eGUIDE

WRITING GOOD USABILITY TASKS AND SCENARIOS

UX24/7

5 Decemeber 2017

UX247: Guide: Writing Good Usability Tasks and Scenarios

At UX247 we provide the option of writing your own tasks or scenarios. This guide will help you to write a good task or scenario that will deliver the maximum value.
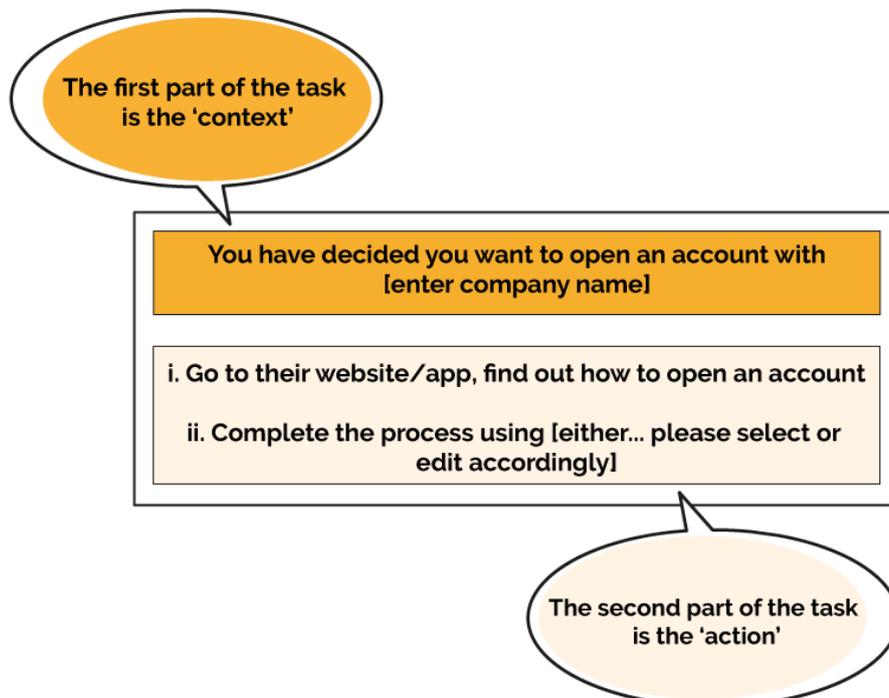
First though you should check whether one of our pre-written tasks can be altered to provide what you need. Our booking process is configured so that you can copy (ctr c) and paste (ctr v) our pre-written tasks into the "Write your own task" field where it can then be edited to your specific requirements. The existing structure should help guide you but if you need or would like to know more about writing a good task and scenario the following should help.

We have provided a table containing all our pre-written tasks in Appendices at the end of this document.

Task or Scenario Structure

Let us first look at one of our own pre-written tasks and break it down into its component parts:

This task is from the category 'apply/register/buy' and is a "Registering for an account" task.

Context

As the example illustrates the context provides the user with an understanding of the situation they find themselves in. This should be written in such a way that it is

recognisable to the user as a real-world scenario that they might encounter in everyday life. The 'Context' will use expressions such as:

"You're thinking about getting…"

"You have recently seen…"

"You have decided to…"

The context will also include information about the company, proposition, information or other focus subject.

Action

The next part of the task is the action. This is where we explain to the user the activity we want them to perform and can include the goal we want them to achieve. We also need to provide them with a start point such as 'Google search', 'app store', 'registration page', 'basket' etc.

The 'Action' will use expressions such as:

"Learn how to…"

"Register for…"

"Find out how to…"

The action can be broken down into a number of parts if there are specific steps to be taken all of which combine to create an overall scenario and so each should be clear in terms of the start point and the required activity.

Core Principles

Tasks should not be too long; between 200 and 350 characters is normally sufficient. Keep in mind participant's act quite similarly to how they do in the real world and will scan read to find the key instructions. If you write very long tasks they will become distracted and may go off at a tangent. It is better to break a scenario up into manageable bits if you are interested in granular feedback about each step.

If none of our pre-written tasks work for you and you would like assistance writing a task or scenario specifically for your requirement, please get in contact with us at info@ux247.com *or +44(0)800 0246 247 and we will help you craft the right wording.*

Appendix - Task List

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Financial Services	discover	Searching for a financial product using Google	You are interested in [enter product] and want to do a bit of research. Start your search using Google and select the search result that appeals to you the most. i. Use Google to find a website that will help you find and compare different providers. ii. Use this website to compare [enter product] and find those that initially appeal to you the most. iii. Use this website to find [enter product] from [enter company name] and compare them to other providers of your choice.
Financial Services	browse / find	Researching a financial product (single website)	You are interested in applying for a [enter product] and want to see what [enter company name] provide. i. Go to [enter company name] website and find out where you can read all about their [enter product]. ii. Read all the information you can find on their [enter product] to help you understand what is available and decide whether you want to apply or not. iii. Use the [enter tool or specific function] provided to help you [describe use of tool or function].

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Financial Services	browse / find	Researching a financial product (multiple websites)	You have narrowed your search for [enter product] down to 3 providers [enter company name and 2 other providers] and want to find out a little bit more information to help you decide between them. Go to their websites in turn and perform the following: i. Find out where you can read all about their [enter product]. ii. Scan the website to get a sense of the information they provide and which one appeals to you the most.
Financial Services	apply / register / buy	Apply for a financial product	You have decided you want a [enter product] with [enter company name]. Use the website to apply [either… *please select or edit accordingly*] a. making use of the following information as you go [provide details]. b. making up the information as you go. c. using your own details, which will not be stored by [enter company name].
Financial Services	apply / register / buy	Apply for a financial product using saved information	You decide to return to complete an application for [enter product] with [enter company name] which you have saved. Go to the website and complete your application, using [provide further information required *e.g. reference number*]. Imagine you experience a problem with your application and are unclear how to proceed. Find out what you can do to help you resolve problems you may have with your application.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Financial Services	use / play / manage	Set up account for online access	You have a [enter product] account and want to manage it online. Using the following information [provide account / sign-in details], go to the website to: i. Find out what you have to do to set up your account for online access. ii. Complete the process to set up your account for online.
Financial Services	use / play / manage	Using a financial product - review bank account	Use the following information [provide account / sign-in details] to: i. Sign in / log on to your [enter product] account. ii. Check your [enter product] balance. iii. Look at your latest [enter product] statement. iv. Change your address on your [enter product] account
Financial Services	use / play / manage	Using a financial product - account transactions	Use the following information [provide account / sign-in details] to: i. Sign in / log on to your [enter product] account. *choose any 2* ii. Pay a bill from your [enter product] account. iii. Transfer some money from your [enter product] account to *a friend or [enter product] account.* iv. Pay off a lump sum from your [enter product] account. v. Set up a direct debit / standing order from your [enter product] account.
Financial Services	use / play / manage	Using a financial product - order foreign currency	Use the following information [provide account / sign-in details] to: i. Order foreign currency.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Financial Services	use / play / manage	Using a financial product - use new tool (logged in state)	Use the following information [provide account / sign-in details] to: i. Sign in / log on to your [enter product] account. ii. You notice a [enter name for tool or feature] which you have not seen before. Use IT to find out what it does.
Financial Services	use / play / manage	Using a financial product - online account query (logged in state)	Use the following information [provide account / sign-in details] to: i. Sign in / log on to your [enter product] account. You have a query about [add description] on your [enter product] account. i. Find out all the different ways you can get help to resolve your issue. ii. Without phoning, get as much information as you can to help you.
Financial Services	use / play / manage	Using a financial product - lost/stolen card	Your credit card / debit card was lost / stolen. Using the following information [provide account / sign-in details] find out what you have to do.
Financial Services	use / play / manage	Using a financial product - fogotten username & password	You have forgotten your username / password / login details for your [product name] account. Using the following information [provide details] find out what you can do and complete the process to log in to your account.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Financial Services	close / cancel	Closing or paying off a financial product	You have a [enter product] account but have decided to close it down. Using the following information [provide account / sign-in details] find out what you have to do. *or* You have a [enter product] account and want to pay it all off. Using the following information [provide account / sign-in details], go to the website and find out what you have to do. *or* You have a [enter product] account and you want to close it down and transfer everything across to another provider. Using the following information [provide account / sign-in details], go to the website and find out what you have to do.
Gaming/Casino/Sportsbook	discover	Searching for a gaming product using Google	You are interested in [enter product] and want to do a bit of research. Start your search using Google and select the search result that appeals to you the most. i. Use Google to find a website that will help you find and compare different providers. ii. Use this website to compare [enter product] and find those that initially appeal to you the most. iii. Use this website to find [enter product] from [enter company name] and compare them to other providers of your choice.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Gaming/Casino/Sportsbook	browse / find	Find a bet	You are interested in placing a bet on [enter details] and want to see if [enter company name] list this event and what odds they offer. i. Go to their website/app and find out if you can place a bet on [enter event]. ii. Find out the best odds on offer for [enter event]. iii. Use the [enter tool or specific function] provided to help you [describe use of tool or function i.e. "change to fractional odds"].
Gaming/Casino/Sportsbook	browse / find	Place a single bet	You are interested in placing a bet on [enter details] and want to see if [enter company name] list this event and then place a bet. i. Go to their website/app and find out if you can place a bet on [enter event]. ii. Place a bet of £[insert amount] on the event that you believe is good value. iii. Use the [enter tool or specific function] provided to help you [describe use of tool or function i.e. "change to fractional odds"].
Gaming/Casino/Sportsbook	browse / find	Place an in-play bet	You are interested in placing an in-play bet on [enter details] and want to see if [enter company name] list this event and then place a bet. i. Go to their website/app and find out if you can place an in-play bet on [enter event]. ii. Place a bet of £[insert amount] on the event that you believe is good value. iii. Use the [enter tool or specific function] provided to help you [describe use of tool or function i.e. "change to fractional odds"].

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Gaming/Casino/Sportsbook	browse / find	Place a multiple bet	You are interested in placing a multiple bet on [enter details] and want to see if [enter company name] list the event and then place a bet. i. Go to their website/app and find out what multiple bet options are available to you on [enter event]. ii. Place a bet of £[insert amount] on the [insert details of bet]. iii. Use the [enter tool or specific function] provided to help you [describe use of tool or function i.e. "change to fractional odds"].
Gaming/Casino/Sportsbook	browse / find	Check results	You would like to find out the results of [enter details] and want to use [enter company name] to find them . i. Go to their website/app and find out what the result of [enter event] was. ii. Use the [enter tool or specific function] provided to help you [describe use of tool or function i.e. "change to fractional odds"].
Gaming/Casino/Sportsbook	browse / find	Check the form	You would like to check the form of [enter details] and want to use [enter company name] to find them. i. Go to their website/app and find out what the current form is. ii. Use the [enter tool or specific function] provided to help you [describe use of tool or function i.e. "change to fractional odds"].

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Gaming/Casino/Sportsbook	browse / find	Find a game	You would like to find a game [enter details] and want to use [enter company name] to find it. i. Go to their website/app and find the game. ii. Find out what you need to do to play it.
Gaming/Casino/Sportsbook	apply / register / buy	Open an account with an operator	You are interested in opening an account with [enter operator name]. i. Go to their website/app and find out how you can open an account. ii. Complete the registration process [either… please select or edit accordingly] a. making use of the following information as you go [provide details] . b. making up the information as you go. c. using your own details, which will not be stored by [enter company name].
Gaming/Casino/Sportsbook	use / play / manage	Play a game for money	You would like to play a game for money and want to use [enter company name] to do so. i. Go to their website and find a game *or* find [enter name of game]. ii. When you have found the game, find out what you need to do to play it.
Gaming/Casino/Sportsbook	use / play / manage	Play a demo game	You would like to play a game without paying any money and want to use [enter company name] to find it. i. Go to their website and find a game *or* find [enter name of game]. ii. When you have found the game, find out what you need to do to play it.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Gaming/Casino/Sportsbook	use / play / manage	Switch games	You are playing [enter game name] and would like to play a different game using [enter company name] to do so. i. Go to their website and start playing the first game. ii. After playing the game for a short period find out what you need to do and then switch to and start playing [enter second game name].
Gaming/Casino/Sportsbook	use / play / manage	View game rules	You would like to find the rules of the [enter details] game. i. Go to the website/app and find the rules of the game.
Gaming/Casino/Sportsbook	use / play / manage	Fund your account	You have an account with [enter operator name] and need to add funds so that you can use it. i. Go to their website/app and find out how to add funds to your account. ii. If required use the following information to login to your account: [username: insert & password: insert] iii. Deposit £[insert amount] using the dummy payment information provided: [dummy credit card /bank account information].
Gaming/Casino/Sportsbook	use / play / manage	Withdraw funds	You have an account with [enter operator name] and wish to withdraw funds. i. Go to their website/app find out how to withdraw funds from your account. ii. If required use the following information to login to your account: [username: insert & password: insert] iii. Withdraw £[insert amount].

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Gaming/Casino/Sportsbook	use / play / manage	Check your account for promotions	You have an account with [enter operator name] and want to check whether you have received any incentives or promotions. i. Go to their website/app find out whether you have received an promotions. ii. If required use the following information to login to your account: [username: insert & password: insert]
Gaming/Casino/Sportsbook	use / play / manage	Check your account transactions	You have an account with [enter operator name] and wish to check your previous transactions. i. Go to their website/app find out what transactions have taken place o your account [in the past xx days]. ii. If required use the following information to login to your account: [username: insert & password: insert]
Gaming/Casino/Sportsbook	close / cancel	Closing your gaming account	You have a [enter product] account but have decided to close it down. Using the following information [provide account / sign-in details] find out what you have to do and then close the account. *or* You have a [enter product] account and you want to close it down and transfer out any remaining funds before doing so. Using the following information [provide account / sign-in details], go to the website and find out what you have to do and then close the account.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Retail	discover	Searching for a product using Google	You are interested in [enter product] and want to do a bit of research. Start your search using Google and select the search result that appeals to you the most. i. Use Google to find a website that will help you find and compare different providers. ii. Use this website to compare [enter product] and find those that initially appeal to you the most. iii. Use this website to find [enter product] from [enter company name] and compare them to other providers of your choice.
Retail	discover	Find a store	You want to find your nearest [enter name] store. i. Start your search using Google and select the search result that appeals to you the most. Ii. Find the address of the nearest store to you.
Retail	browse / find	Browse and find a product	You are interested in buying a [enter product] and want to see what [enter company name] provide. i. Go to their website/app and find out where you can look at all about the product. ii. Look at everything you can find on the product to help you understand what is available and decide whether you want to buy or not. iii. Use the [enter tool or specific function] provided to help you [describe use of tool or function]. iv. Add the product to your basket.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Retail	browse / find	Browse and find multiple products	You are interested in buying an [enter products/descriptor i.e. "outfit", "set-off xxx"] and want to see what [enter company name] provides. i. Go to their website/app and find each of the items. ii. Look at everything you can find on each [product] to help you understand what is available and decide whether you want to buy or not. iii. Use the [enter tool or specific function] provided to help you [describe use of tool or function] make a decision. iv. Add the products to your basket.
Retail	apply / register / buy	Buy a product	You have decided you want to buy a [enter product] from [enter company name]. i. Go to their website/app, find the product and add it to your basket. ii. Complete the purchase process using [either… please select or edit accordingly] a. the following information as you go [provide details] . b. information that you make up as you go. c. your own details, which will not be stored by [enter company name] and stopping at the point of payment.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Retail	apply / register / buy	Registering for an account	You have decided you want to open an account with [enter company name]. i. Go to their website/app, find out how to open an account. ii. Complete the process using [either… please select or edit accordingly] a. the following information as you go [provide details] . b. information that you make up as you go. c. your own details, which will not be stored by [enter company name] and stopping at the point of payment.
Retail	apply / register / buy	Order and collect	You have decided you want to buy a [enter product] from [enter company name] and collect it form your local store. i. Go to their website/app, find the product and add it to your basket. ii. Proceed through the purchase process selecting collection from a store local to you iii. Use [either… please select or edit accordingly] a. the following information as you go [provide details] . b. information that you make up as you go. c. your own details, which will not be stored by [enter company name] and stopping at the point of payment.
Retail	apply / register / buy	Remove from basket (note you must select an add to basket task first)	You have decided you no longer want to buy the product. i. Remove the item from your basket.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Retail	apply / register / buy	Gift list set-up	You have decided to set up a gift list with [enter company name]. i. Go to their website and find out how to set up a gift list. ii. Create a list for a [enter event] and add a number of items that you would consider appropriate.
Retail	apply / register / buy	Gift list buy	You have decided you want to buy a [enter product] for a friend from the gift list they have set up with [enter company name]. i. Go to their website/app, find the gift list. ii. Select a product from the list and add it to your basket. ii. Complete the purchase process using [either… please select or edit accordingly] a. the following information as you go [provide details] . b. information that you make up as you go. c. your own details, which will not be stored by [enter company name] and stopping at the point of payment.
Retail	use / play / manage	Return a product / getting a refund	You have decided that you no longer want an item that you bought from [enter company name]. i. Find out what the returns and refund rules are. ii. Find all the information you can about how to return a product for exchange or refund.

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Retail	use / play / manage	Track delivery	You have ordered a [enter product] for delivery from [enter company name] and want to find out where it is. i. Go to their website/app and find out information about the delivery of your order using the following information [order information].
Retail	use / play / manage	Delivery information	You are interested in buying a [enter product] and want to see what [enter company name] delivery information is. i. Go to their website/app and find out what you can about delivery for this product. ii. Look at everything you can find on delivery to help you understand what is available.
Retail	use / play / manage	Loyalty scheme registration	You are interested in signing up to the loyalty scheme with [enter company name]. i. Go to their website/app and find out what you can about the loyalty scheme. ii. Apply to join the loyalty scheme using [either… please select or edit accordingly] a. the following information as you go [provide details] . b. information that you make up as you go. c. your own details, which will not be stored by [enter company name].

Sector	Task/ Journey Type	Task Context	Tasks as participants will see them
Retail	use / play / manage	Loyalty scheme account information	You have a loyalty scheme with [enter company]. Go to their website/app and use the following information [provide account / sign-in details] to: i. Sign in / log on to your loyalty account. ii. Check your account rewards balance. iii. Look at your latest statement. iv. Change your address
Retail	close / cancel	Close account	You have an account with [enter company] but have decided to close it down. i. Using the following information [provide account / sign-in details] find out what you have to do to close the account. ii. Complete the account closing process.