

TOOL TEMPLATE: HEURISTIC EVALUATION

References: Nielsen, J. (1994). Heuristic evaluation. In J. Nielsen and R. L. Mack (eds.) Usability Inspection Methods. New York: John Wiley & Sons.

What features do you need to test?

Complexity: High
Time required: 3-4 hours
Material required: prototypes, paper, pen, computer, printer
Note: the ideal number of evaluators is 5.

What is it for?

Heuristic evaluation is a usability inspection technique that is cost-efficient while also effective. It is a process in which evaluators analyze on their own the usability of a service/product according to a set of heuristics, i.e. a set of pre-defined criteria to test usability. Doing so allows innovators to iterate the design process quickly.

How to use it?

The initial heuristics used were made to evaluate user interfaces in computer software but based on the product at hand the following heuristics should be modified according to market research and requirements. For services, these could be based on touchpoints, i.e. the points along the service where the users and the organization “meet”.

There are three phases of heuristic evaluation. The ideal number of evaluators is five.

Phase 1: The Briefing Session in which the evaluators are told what to do. It is useful to prepare a specific document to either read off of or have the evaluators read on their own so that each evaluator is given the exact same information.

Phase 2: The Evaluation Period, in which the evaluators inspect on their own the product/service at least two times. During the first time, the evaluators become familiar with the process.

In the second run, the evaluator can stop and specific points and identify specific usability problems.

Evaluators can be given specific evaluation tasks. In some cases, it could also be useful to provide the evaluator a second person who writes down the problems encountered.

Phase 3: The Debriefing Session, in which the evaluators come together as a group to discuss their findings and brainstorm ways to fix any problems.

When setting up your own evaluation, the first step is to define your heuristics. Then evaluators must be chosen and the briefing document prepared.

Visibility of system status

- _Are users kept informed about what is going on?
- _Is appropriate feedback provided within reasonable time about a user's action?

Match between system and the real world

- _Is the language used at the interface/touchpoint simple?
- _Are the words, phrases and concepts used familiar to the user?

User control and freedom

- _Are there ways of allowing users to easily escape from places they unexpectedly find themselves in?

Consistency and standards

- _Are the ways of performing similar actions consistent?

Help users recognize, diagnose, and recover from errors

- _Are error messages helpful? Are information points/customer care centers helpful?
- _Do they use plain language to describe the nature of the problem and suggest a way of solving it?

Error prevention

- _Is it easy to make errors? If so where and why?

Recognition rather than recall

- _Are objects, actions and options always visible?

Flexibility and efficiency of use

- _Have accelerators (i.e. shortcuts) been provided that allow more experienced users to carry out tasks more quickly?

Aesthetic and minimalist design

- _Is any unnecessary and irrelevant information provided?

Help and documentation

- _Is help information provided that can be easily searched and easily followed?