

Call me Ishmael

HOW THIS BOOK CAME TO BE, SOME DISCLAIMERS,
AND A BIT OF HOUSEKEEPING

Excerpted from *Rocket Surgery Made Easy* by Steve Krug.

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I love deadlines. I love the whooshing noise they make as they go by.

—DOUGLAS ADAMS, AUTHOR OF *THE HITCHHIKER'S GUIDE TO THE GALAXY*, WHO WAS NOTORIOUSLY LATE DELIVERING MANUSCRIPTS

I knew I wanted to write this book nine years ago, right after I finished writing *Don't Make Me Think*.

Without meaning to, in the process of writing it I had ended up convincing myself of three things:

- Usability testing is one of the best things people can do to improve Web sites (or almost anything they're creating that people have to interact with).
- Since most organizations can't afford to hire someone to do testing for them on a regular basis, everyone should learn to do it themselves. And...
- I could probably write a pretty good book explaining how to do it.

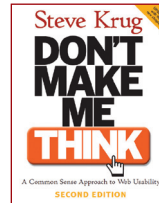
There was just one small problem, though:

I hate writing.

Actually, I don't *hate* it so much as I find it, well, probably the most accurate word is *agonizing*.

And not "Should I buy the white iPhone or the black iPhone?" agonizing. More like red-hot-pokers-in-your-eyes agonizing. I've always said that writing is the hardest work I know of and that I can't understand why anyone would do it unless someone was holding a gun to their head (which, of course, is what deadlines are all about).

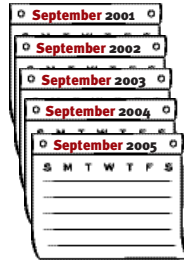
As it turns out, though, it was probably a good thing that I wasn't motivated to write this book right away, because one of the nicest side effects of the first



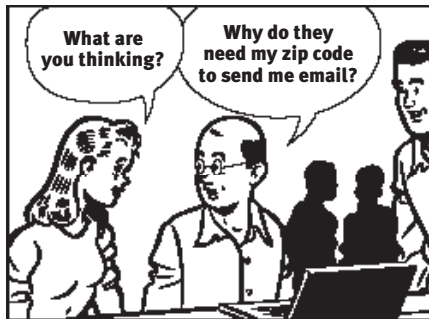
OPENING REMARKS

book was that it gave me the opportunity to teach workshops, which suit my nature much better than writing or consulting.¹

For the first five years, my workshop was a combination lecture-demo format, where I'd do brief expert reviews of attendees' sites to show them how I thought about usability problems. I wanted to teach people how to do their own testing, but I couldn't figure out how to fit it into a one-day workshop.



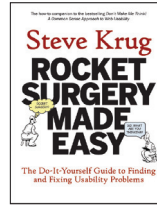
Then three years ago, after a lot of pondering, I finally figured out how to do a workshop that would teach people to do their own testing—including some hands-on practice—in one day. I changed the format so the whole day was about the topic of this book: doing your own usability tests.



After teaching this new format for a few years, I understood a lot more about what people needed to know. (It's true: if you really want to learn how to do something, try teaching other people how to do it.) And having watched a lot of people learn to do it, I was even more convinced of the value of do-it-yourself testing.

¹ *With workshops, you can't procrastinate: you either show up in the morning or you don't. And there's no homework. At the end of the day, you're finished. Period. The first time I taught a workshop, when everyone had gone home I remember having this very odd feeling that my work was actually done—something I hadn't felt in all my years of consulting. I highly recommend it.*

Finally, last year, in a moment of weakness, I gave in and signed a contract (and acquired the necessary deadline/gun) to write this book. After all, there are only so many people who can afford a day-long workshop. I like to think that reading this will be a pretty good substitute.



Does the world really need another book about usability testing?

I didn't invent any of this. Usability testing has been around for a long time, and a lot of people—Jakob Nielsen being the most vocal and influential—have been advocating “discount usability testing” for at least twenty years.

And there are several excellent books available that explain in detail how to do a usability test. I strongly suggest that you read at least one of them after you've had a chance to start doing some testing.²

But this book is a little different, in two important ways:

- **It's *not* comprehensive.** This book assumes that usability is not your life's work and probably not even part of your official job description. Since it's not, there's a limit to how much you really need to know and how much time you can afford to spend learning about it. As with *Don't Make Me Think*, I've tried to keep it short enough to read on a long plane ride.³

The purpose of this book is not to make you a usability professional or a usability testing expert; it's just to get you to do *some* testing. Some of you will get really interested in it and go on to learn everything there is to know. Chapter 15, *Overachievers Only*, is meant for you. But you don't *need* to learn more than what's in this book to get enormous value out of testing.

² You'll find a list of my favorites in Chapter 15.

³ If you actually are going to read it on a plane, you should probably download the demo test video file to your laptop before you leave home, so you can watch it when you get to Chapter 2. You'll find it at www.rocketSURGERYmadeeasy.com.

OPENING REMARKS

- **It's not just about *finding* the usability problems.** Unlike the other books about testing, this one is about finding *and fixing* the problems. Chapters 10 through 13 explain how to decide which problems to fix and the best ways to fix them. This hasn't really been covered in much detail before, and it's kind of, well...important.

Call Me Irresponsible

Some people in the usability profession believe that it's irresponsible to tell "amateurs" that they should do their own testing. These are smart people, and I don't take their opinions lightly. Their two main arguments seem to be

- **Amateurs will do a bad job** and as a result, they'll (a) make the thing that they're testing worse instead of better, and (b) convince people that usability testing isn't valuable.
- **Amateurs will do a good job**, which will take work away from professionals.

Before I try to address these concerns, let me make one thing perfectly clear:

If you can afford to hire a usability professional to do your testing for you,⁴ do it.

There's no question: a good usability professional will be able to do a better job of testing than you will. In addition to having experience designing and facilitating tests, a professional will have seen the same usability problems many times before and will know a lot about how to fix them.

Besides, it always helps to have a fresh pair of eyes looking at what you're building. And for the price of the testing, you tend to get an expert review thrown in for free, because the professional will have to use the thing to figure out how to test it.

⁴ *...and it's not going to consume your entire usability budget doing only one round of testing...*

And then there's objectivity: being an outsider, a professional may be in a better position to point out unpleasant (and important) truths, like the fact that you've created a product that doesn't work or one that no one needs.

The problem is, though, that the vast majority of Web sites can't afford to hire a professional—at least not for more than one round of testing. And even if they could, there aren't enough professionals to go around.⁵

Even more important, *I don't think amateurs will do a bad job*. I haven't seen it happen personally. And for years now I've been asking for anecdotal evidence of cases where someone has made something *less* usable as a result of doing some usability testing, and I haven't gotten any to speak of.⁶

Not that I think it can't happen, just that I think it rarely does. And in most cases, I suspect it would be the result of someone pretending to do unbiased usability testing while actually manipulating the process to push a personal agenda.

And I also doubt that testing by amateurs will take work away from professionals. For one thing, it's not the kind of work professionals really should be doing.

Jakob Nielsen explained it perfectly in a speech about his vision for the future of usability at the UPA's annual conference in 2001.⁷ He said that *everybody* should be doing what he called "simple user testing (debugging a design)," while professionals should be doing things that require more skill and experience, like quantitative tests, comparative tests, and tests of new technologies. Senior professionals, he said, should be doing really sophisticated things like international testing and developing new

⁵ *Best estimates seem to be that there are roughly 10,000 people worldwide who would identify themselves as usability professionals, and only a fraction of them do testing for a living, while there are, at last count, umpteen billion Web sites. You do the math.*

⁶ *In fact, I've been so impressed by the lack of response that I've thought about offering The Krug Prize: ten million Indonesian Rupiah (10,000,000 RIA, or roughly \$1,090.16 US) split among the first ten people who submit reasonable proof of such cases.*

⁷ *The UPA is the Usability Professionals Association (www.upassoc.org). If you end up deciding to really pursue usability, I highly recommend their annual conference. It's usually held in June, in someplace that's ungodly hot. But it's an excellent conference; the sessions are very practical (not academic), and the people are very friendly.*

OPENING REMARKS

methodologies (i.e., thinking deep thoughts and hobnobbing with their fellow wizards).

In my experience, people who have been exposed to testing almost always end up convinced that it's valuable. So I would argue that if more people are doing their own testing (and more people are observing those tests), there will end up being more work for professionals, not less.

Personally, if I had some money to spend on usability, I'd hire a professional to do an expert review and then do the testing myself. Or I'd hire a professional to do an initial round of testing who was willing to teach me how to do it myself.

Not present at time of photo

There are a number of things you won't find in this book:

- **Different testing methods.** There are many kinds of usability testing—qualitative, quantitative, summative, formative, formal, informal, large sample, small sample, comparative tests, benchmarking tests, and on and on—and they're all valuable for different purposes.

I'll discuss some of these variations at the beginning of the next chapter, but you need to know that this book is only about one particular kind: simple, informal, small-sample, do-it-yourself usability testing (sometimes known as discount usability testing).

- **Ways to test instrument panels for nuclear reactors or air traffic control systems,** or any systems where people can be injured or lives lost if someone gets confused while using them. The kind of testing this book describes is not for making things *foolproof* to use; it's just for making them *easier* to use. For life-or-death situations, you want exhaustive, carefully designed, quantitative, large-sample, reproducible, scientific studies that produce statistically significant results. Or at least *I* do.
- **The one right way to do things.** There are many ways to do most of this. Where there are options, I've usually chosen the one I think works best for most people, or the one that's easiest for a beginner to do. But that doesn't mean I think it's the only way that works.

The obligatory companion Web site

Yes, there is a companion Web site (www.rocketurgerymadeeasy.com), with files you can download, like the demo test video and all the scripts, forms, and handouts in the book.

These files are available to everyone, because I really do want as many people as possible to do their own testing. They may be updated at some point, although, knowing myself as well as I do, I have to admit that's pretty unlikely.

Maxims? Really? You're sure you want to call them "maxims"?

One thing you *will* find in this book is a series of what I'm calling—for lack of a better word—maxims. They're easy to spot, because they look like this:



**Recruit loosely and
grade on a curve.**

What are they? I suppose they're what some people would call critical success factors. In teaching people to do their own testing, I've found that there are really only a few things you need to keep in mind to succeed. But for some reason, people seem to have a hard time remembering all of them. So over time, I've reduced them to hopefully-more-memorable maxims.

If you forget everything else in this book, try to remember these; they're my most important pieces of advice. You'll find a list of all of them—suitable for framing and hanging on a cubicle wall—in Chapter 16.

A few words of encouragement

Four words, to be exact: *You can do this.*

For years, my corporate motto has been "It's not rocket surgery™" because I believe that at its heart most usability work is really not very hard to do. I have yet to come across someone who can't do a pretty good usability test—certainly good enough that doing it is much better than *not* doing it.

OPENING REMARKS

Since you're reading this, it's very likely that you're the *de facto* user advocate in your organization or department: the person most interested in making sure that your "product" (whether it's a Web site, a Web or desktop application, or whatever) is user-friendly.

You may not have much (or any) support for this interest. Or you may have moral support, but no resources. As a result, you're probably going to be pursuing it in what we laughingly refer to as your copious spare time.

But take heart, and be of good cheer: it's easy, pretty much foolproof, and you can start doing it next week. And one more thing people always forget to mention: it's fun. All the people I know who have been doing usability tests for years still get a kick out of it and find them fascinating.

So get started as soon as you can, keep it as simple as you can, and have fun with it.

FAQ

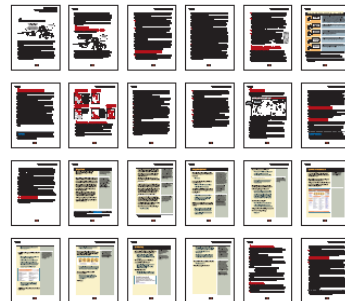
Isn't this just a rehash of your other book?

Who let *you* in?

No, it really isn't. The first book was about how to think about usability; this one is about how to *do* usability.

In some ways, this book *is* an expanded version of the chapter in *Don't Make Me Think* that explained how to do a usability test.⁸

It was very gratifying how many people wrote to tell me that they started doing their own testing based on the small amount of information that was there. This book, on the other hand, is intended to be a complete teach-yourself-how-to-do-it guide.



Chapter 9 from *Don't Make Me Think*

And besides, all of the headings in the first book were red.

⁸ *At one point, I was a little concerned about the possibility of unwittingly quoting large passages of the first book without attribution and then facing the unpleasant prospect of having to sue myself for plagiarism. I think I've managed to avoid it. If not, I hope I can at least convince myself to settle out of court.*

What if I don't intend to do any testing? Should I still read this book?

Yes. Even if you're sure you're never going to do the kind of testing I'm recommending here, I think you'll find reading about the process—particularly the chapters about fixing problems—worthwhile.

I also highly recommend that even if you're not going to be doing full-scale testing, you force yourself to spend half an hour doing a very simple usability test of something that you're working on. If you give it a try, you may find that quick, informal usability testing is a great tool to have at your disposal.

Aren't you oversimplifying this?

Yes. That's the whole point. Doing this kind of testing is enormously valuable *if you do it*, and people don't do it because they have the impression that it's more complicated than it needs to be. So I'm trying very hard to keep it as simple as possible.

Does this work only for Web sites?

The focus in this book is on testing Web sites, because that's what most people are working on nowadays, and to keep the book short and uncomplicated. But the same method and principles can be used to test and improve almost anything that people use. Web applications and desktop software are obvious candidates, but I think it applies equally well to ballots, cell phones, PowerPoint presentations, instructions for digital cameras, and the forms you fill out in your doctor's office. I'd like to think that you could substitute “your product” wherever I refer to “your Web site.”

How can you have “Frequently Asked Questions” in a brand new book?

Good question. They're the questions that always come up at my workshops. I figure it's safe to assume that readers will have the same questions.