

Kick-off checklist for a remote UX study

The product under testing			
How would you describe the purpose of the product?	Describe the purpose of the product in the words of the study sponsor.		
What are the most important functions?	List the 3 most important functions of the product.		
How often would the product be used in a normal user scenario?	Is it a product that is used multiple times a day like an email app or maybe once a week like a banking app etc?		
What are the most frequent use cases?	Are the most important functions also the use case which are mostly frequently used?		
What are known pain points?	Are there are known pain points gathered from customer service calls, app store reviews, internal feedback etc?		
Who are the main competitors?	Which products would the study sponsor consider to be competing products? Are there are other products which customers might consider competition?		
The goal of the study			
What is the goal of the study?	Why is the study sponsor kicking off this usability test now? What was the trigger? What is the goal? What are their expectations? What do they hope to do with the results?		
The budget			
What is the available budget?			
The scope of the study		Estimated duration and/or max duration	Success criteria
List the tasks			
Breadth or depth?	If not all of the tasks listed above can be completed in the available timeframe, is depth more important than breadth i.e. should certain tasks be prioritised or should all be included albeit at a more superficial level.		
Benchmark scores to use	Are there benchmarks already in use which should also be used for this study? If yes, which ones? What are the questions to ask and how is the score evaluated?		
The test environment		OS version	Browser and version
Which are the target devices for the study? And in which ratio?	Smartphone		
	Tablet		
	Desktop/Laptop		
	Other		

What state is the test object in? Early stages	Wireframe	Prototype	Test or staging
	What format are the wireframes in?	What format or tool is the prototype in?	
Live or production			
(If test) is representative test data available?			
(If test) is an NDA required? How will it be provided?			
What version number of the product will be tested?			
(if live) how long has the test object been live?			
Product access		URL	
(if virtual) what URL should be used to access the product? Are there different URLs for mobile and desktop?	Mobile		
	Desktop		
	Other		
(If app) what is the name of the app as listed in the app stores?			
(if app) in which app stores is the product available?			
(if physical) are the participants required to own the product? Or will it be shipped to them?			
Credentials			
Are credentials required to perform task?			
Do they participants need to create an account?			
Will the participants be required to share personal information such as bank details?			
(if one set of credentials) can the participants use the same credentials concurrently?			
Can the accounts be deleted after the study?			
Should a list of created accounts be provided after the study for mass deletion of accounts or placed orders etc			
Are there any known bugs?			
Are there any known bugs or areas of the product that do not yet work as intended?			
The participants		Ranges / exclusions	Ratios
Demographic requirements:			

Age			
Gender			
Marital status			
Number and age of children			
Ethnicity			
Occupation			
Income			
Location			
Education			
Digital literacy			
Device requirements			
Other criteria			
The number of participants			
Participant incentive / compensation			
The study methodology	Remote moderated	Remote unmoderated with videos	Remote unmoderated with surveys
The schedule			
When is the product available for testing?			
Are there any hard deadlines?			
Are there any update cycles that need to be taken into consideration?			
Do the participants need to be equipped with physical devices? (who will ship / will require list of addresses)			
Does the study fall into typical vacation or holiday periods?			
Is a pilot run with participants/stakeholders Necessary?			
Is a reset or reload required between sessions?			
The deliverables			Target date
Study framework			Click or tap to enter a date.
Participant screener			Click or tap to enter a date.
Discussion guide / survey (number of iterations)			Click or tap to enter a date.
Report (format and language) with or without recommendations / topline report			Click or tap to enter a date.

Next steps	