Overview:

Assessment can be conducted at several stages of a project or service lifecycle, ranging from early stage user needs assessment interviews, to mid-stage user interface usability testing, to post-launch reviews. Understanding the characteristics of different assessment techniques, as well as the type of information that will likely be gathered by each method, will help match the assessment activity to the project team's need for information.

Method	Characteristics
Observation 1-3 individuals	• Observe and listen: "points of pain", frustrations, work-arounds • Define an existing problem or unmet need • One-to-one; natural work environment • Performed during early stage of development or redesign
Interviews 1-3 individuals per session	• Discover how work is currently performed; identify unmet needs or "wish lists"; uncover attitudes, preferences, and concerns • Solicit feedback on services under consideration or development • Ask participants to respond to sites/services similar to what you are developing • 5-10 open-ended, probing questions; informal dialogue • Face-to-face or phone; one-to-one, "friendly dyads", small groups • Performed during early stage of development or redesign
Focus groups 4-10 individuals per session	• Explore attitudes, concerns, unfamiliar subjects, responses to extant or possible services; generate creative ideas • Small group discussion in one location; participants are heterogeneous, e.g., public service librarians • Moderator introduces subject and directs discussion • Performed at early or exploratory stage of development or redesign
Online surveys Highly targeted or broad distribution	• Gather information on current practices, trends, level of satisfaction with current services, likelihood of adopting new services • Limited number of very specific questions; primarily closed-ended combined with a small number of open-ended questions • Distribute to highly targeted group, e.g., university librarians, or broader group, e.g., CDLINFO listserv subscribers • Performed at any stage of development or redesign

Use case scenarios 3-4 per user group, e.g., end user, system administrator	• Task analysis technique: define the steps the user needs to take to accomplish a task • Help focus design process and assure common tasks are supported by new system • Flexible: highly structured or loose narrative style • Combine with early user interviews; reflect users' expectations
Personas / user profiles 3-5 personas	• Helps define system requirements and features • Describes a specific person for whom the system is being designed • Create narratives of how users might interact with system • Developed as reference tool for several stages of design
Task analysis	• Define skills a user must possess in order to complete a task • Break down high level tasks into components; create task flow diagrams • Determine whether UI supports efficient completion of tasks, whether system feedback is sufficient, etc. • Performed in collaboration with project team at early stage of UI design
Card sorting 3-5 participants	• Uncover how users expect information to be structured, grouped, or named • Create a set of cards with one piece of information on each card; participants arrange cards into clusters • Cluster analysis helps establish and name site categories/hierarchy • Performed during early stage of development or redesign
Expert evaluation / usability checklists	• Usability specialists evaluate an interface by applying a set of established guidelines or "heuristics" • Provides quick feedback/recommendations to designers focusing on interface functionality and design • Optimally performed during early stage of UI design
Usability testing 4-6 individuals	• Uncover UI deficiencies that prevent users from efficiently and successfully completing tasks • Task-based, e.g., "How will you logon to this system?" • "Think-aloud" protocol: users asked to speak their thoughts as they perform a task • May be conducted at several stages of design: early paper prototypes, basic functional prototypes, production sites