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# Usability Vendor Checklist

A checklist for use when  
evaluating potential usability vendors

**[ W CRAIG TOMLIN – USABILITY VENDOR CHECKLIST ]**

## INTRODUCTION:

### Choosing a usability vendor can be a daunting task



*A typical 1-on-1 usability test in action*

Choosing a qualified usability vendor can be a difficult proposition for firms seeking usability services. Unlike most other professional services (such as accounting or human resources consulting) usability is a relatively unknown quantity for many companies, and often they have little or no experience with the methodology for evaluating usability vendors.

Often, usability vendors will provide varying types of generic information, testimonials and related data about their services that may have little or no bearing to the firm's needs. This makes it difficult to compare vendors side by side, on an “apples to apples” basis, because

the generic information provided by the vendors varies so greatly.

Typically, a company seeking usability services will ask for referrals from other companies, or may seek to qualify usability “experts” on their own by looking for usability vendors that rank in the top of search results for terms such as “usability” or “usability testing.”

However, referrals and word of mouth references may be rare to find from other companies, and even if referrals are provided, there is no guarantee that the services provided to the referring company would be the same services for the firm's project needs.

Relying on the relative positioning of top-ranked usability vendors in search results cannot guarantee that the usability vendor will be the best vendor for the company's particular usability needs either. Judging side by side “apples to apples” comparisons of vendors based on their rankings, and the content of their web sites is highly unreliable, as often there's a lack of “apples to apples” information, and what information is available may not address the firm's unique situation.

So how then can a company seeking usability services compare vendors on a fair and impartial basis? And how can an “apples to apples” comparison of vendors be conducted so as to accurately determine the best usability vendor for the firm's unique needs?

## USABILITY VENDOR CHECKLIST:

### The benefits of using a usability vendor checklist


A recommended approach for fairly and accurately evaluating potential usability vendors is to incorporate a checklist of common usability practices and procedures in a Request For Information (RFI) or Request For Proposal (RFP) that any competent usability vendor can respond to.


By using this checklist as a part of the early information-gathering process, and requiring potential vendors to provide this information as part of a RFI or RFP response, firms will have the information they need with which to compare usability vendors in a fair and impartial manner.


In addition to this checklist, a company can request a sample report or deliverable. Although it's not always possible to compare apples to apples, the sample report coupled with the checklist can provide a better picture of the capabilities and deliverables a usability vendor typically produces.


## OVERVIEW – THE USABILITY VENDOR CHECKLIST:

The checklist is divided into 4 sections, each of which will provide valuable data a firm can use to make apples to apples comparisons of usability vendors.

 **Usability Company & History** - The first section provides an overview of the usability vendor's business. Firms seeking to hire a usability vendor should evaluate the vendor's business to ensure the firm is reputable and in good economic condition.

 **References from Past Usability Client** - The second section provides reference information the firm can use to evaluate references from the usability vendor's prior clients. It is vital for a firm to create a single list of questions to ask each reference, and to ask each reference the same set of questions. The questions should include how the usability vendor performed for the reference, including what worked well, and what the usability vendor needed to improve (if anything).

 **Usability Project Review** - The third section provides high-level project recommendations from the usability vendor. The more details a firm can provide about the desired goal of the usability project, the more detailed the vendors' responses can be. A firm should evaluate the approach, deliverables and time-line to compare how each vendor recommends proceeding, but with an understanding that the approach may change after a vendor is selected and more details are available to the vendor.

 **Usability Testing and/or Analysis** - The fourth section provides high-level information a firm will use to analyze the testing or analysis methods recommended by the vendors. Usability vendors should be able to clearly and concisely explain their rationale for developing Personas, and using those Personas to find and conduct testing with the usability participants. It is also important to define how each vendor intends to make the usability data actionable for the firm.

## OVERVIEW – THE USABILITY VENDOR CHECKLIST:

### Usability Company and History:

- How long has the usability company been providing services?
- Who is on the team, and what are their professional qualifications?
- If a corporation, what does the balance sheet look like?

### References from Past Usability Clients:

- Can the company provide a list of 3 or 4 past clients to use as a reference?
- Call the references and ask about the project, what worked, what could be improved?

### Usability Project Review:

- What approach would the vendor use for your project?
- How long might it take, who would be involved, where would it be done?
- What metrics will be captured and analyzed?
- What best-practices or standards will be used?
- What is the cost range for the project? What are the deliverables?

### Usability Testing and/or Analysis:

- What types of testing are suggested? What are the benefits & pitfalls?
- How will the vendor determine whom should be tested?
- Can the vendor explain how those testers are accurate representatives of your web site or application?
- How will the results of testing and analysis be actionable by you and your web team?

## THE USABILITY VENDOR CHECKLIST:



### Section 1 - Usability Company and its history:

- 1. How long has the usability company been providing services?
- 2. Who is on the team, and what are their professional qualifications?
- 3. If a corporation, what does the balance sheet look like?



### Section 2 - References from past usability clients:

- 1. Can the company provide a list of 3 or 4 past clients to use as a reference?
- 2. Call the references and ask about the project, what worked, what could be improved?



### Section 3 - Usability project review:

- 1. What approach or methodology would the vendor use for your project?
- 2. How long might it take, who would be involved, where would it be done?
- 3. What metrics will be captured and analyzed?
- 4. What best-practices or standards will be used?
- 5. What is the cost range for the project?
- 6. What are the deliverables?



### Section 4 - Usability testing and/or analysis:

- 1. What types of testing will be performed?
- 2. For each type, what are the benefits and pitfalls?
- 3. How will the vendor determine whom should be tested?
- 4. Can the vendor explain how those testers are accurate representatives of your site?
- 5. How will the results of testing and analysis be actionable by you and your web team?