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Investing in Usability: Testing versus Training

by John S. Rhodes

January 25th, 2005

“Usability professionals offer so much more than just testing. Usability dollars can be spent in other ways; in fact, I argue that usability training is often a far better investment than testing.” Assume that you are in charge of a development project and you have about \$10,000 to spend on usability. What would you do? What is the best way to use the money? What is the right way to spend it? What will make the project a success? What is the right thing to do for the organization? What will make the customers happy?

This line of questioning is important because it makes you think about how usability should be invested in usability. It gives you a chance to think about what usability is really worth. It forces you to think about usability as a process and a set of tools, not just a set of tests. Unfortunately, most usability professionals are worried about getting money for usability in the first place, but not worried about how to spend that money once they get it.

In my experience, usability professionals use their budgets to run usability tests. That is, when given money, they immediately start setting up usability programs to solve particular problems. This shouldn’t surprise anyone because many usability professionals think the value of usability is derived entirely from the results of the tests they run.

misconception frustrates me.

Usability is rooted in research and testing

Usability can be considered both an attribute and a process. Usability is an attribute when people characterize something as having “good usability.” For example, if a phone menu is easy to use, we might say it has good usability. But usability is also a process. There are many ways to increase a product’s usability; the usability process can be supported by a wide variety of tools and methods.

Usability professionals like to focus on research. This is not surprising, since usability has strong academic roots in basic and applied psychological research. Because usability professionals are often minted as researchers, they feel that getting results means that they must do testing. This approach is blatantly wrong. There are many ways to get incredibly useful business results from usability practices without performing usability tests.

Further, the lack of business focus in the usability community is appalling. In organizations, usability is a poorly defined business concept. Even though usability offers incredible returns, it is hard to sell. It is hard to sell, I think, because of the focus on *usability testing*. Most business managers have a difficult time understanding how research (i.e., usability testing) generates revenues or reduces costs. The business benefits of usability as a whole are lost because the usability specialists are so narrow in their focus, limiting their focus to *usability testing* to the exclusion of everything else. Business managers and usability managers are confused; I cannot blame them and, in fact, I am on their side.

This focus on testing is a failure in the usability community that needs to be addressed. Usability professionals offer so much more than just testing. Usability dollars could be spent in other ways; in fact, I argue that *usability training* is often a far better investment than *usability testing*. It is often a lot easier to sell training than testing.

Designers and developers versus usability specialists

It might shock people to hear this from me, but when I am acting as a project manager, I'd rather have a great designer on my side than a usability specialist. Given limited time and money, I need someone who can get the job done right. Designers and developers produce tangible results, and the great ones produce incredible results. In most projects, I don't need a usability professional if I have a great designer. Furthermore, most usability professionals can't design or develop their way out of a wet paper bag. They are often limited because they can only do research and analysis, which doesn't mean anything until it is applied to a design. So, usability specialists are usually limited in two ways: they want to test everything and most of them are not worth a damn.

My guess is that, at this point, designers and developers are smiling and reading this and probably feel vindicated. At the same time, usability specialists are loading their shotguns and getting out their pitchforks. They're coming to get me. Hold on, I'm coming. Now I'm going to aim my guns at designers and developers. They have the last word. Believe me.

In my experience, there aren't many great designers and developers. Some are good, certainly, but most are mediocre at best. Too many get along by using old tricks and boring effects. As a project manager, I will trust only the very best designers and developers to do things right. Most of the time, in a project manager role, I have to spoon-feed designers and developers so that they can get the job done. I'm forced to go back to most designs again and again because they are poorly implemented. To spin this another way, designers tend to design for themselves, not for users. If I have limited time and money, which is virtually always the case, I don't have time for below-average designers. The best people get my money and attention because they produce the results I need.

know that I am wrong in some ways and that I am generalizing too much, trying to illustrate how business people think. Usability specialists are seen as academics in white coats, obsessively focused on research and testing. They have poor design skills. On the other hand, most designers and developers generate results that are good for users, and rework is often needed.

So, we are at an impasse.

If only we could get more usability knowledge into the minds of designers and developers. If only we could get usability specialists to expand their horizons beyond usability testing. If only we could help good designers and developers become better. If only we could get everyone to add real value to the bottom line.

Usability training bridges the gap

There is at least one solution: usability training. Instead of spending so much energy on usability testing, usability specialists should spend more time training designers and developers.

The idea is rather simple. Teach designers and developers to better understand usability as both an attribute and a process so that these intelligent folks understand how usability can be added to a product or service. Training can take many forms: interactive workshops, hands-on exercises, user test observations, live user testing, usability heuristics application, card sorting, listening sessions, and so on. Through these exercises, designers and developers are watching users use their products. Imagine: a usability boot camp.

As a result, designers and developers end up with a ton of usability knowledge. More importantly, they can apply simple usability methods to their work going forward. Usability can be built into products by the people building the products. A

A final point: usability training will help designers and developers eliminate pesky issues that detract from product usability. Similarly, training gives people the ability to see non-critical issues more easily. These issues are more general and may actually be overlooked by highly focused usability specialists. Designers and developers, given a little training, have the power to see the human gestalt of the products they are building. They start to see how their products drive emotions, including satisfaction, appreciation, and happiness. In summary, training brings the human side of design to designers and developers who are often unaware of the issues people regularly face.

Let's get the usability community to transfer knowledge. Of course not all knowledge can be transferred, but we can make usability professionals more productive by improving the skills of designers and developers.

Maybe you don't agree. That's fine. But below are some reasons why usability training is a better investment than usability testing.

1. **Usability testing is a one-time investment.**

A research program is designed, testing is done, results are analyzed, and recommendations are provided. The research doesn't generate much value for specific recommendations for that specific research program. In plain talk, research recommendations don't generalize. However, if you train people, they can use the knowledge from one project to another project after project. To use an old metaphor, usability testing is about giving people a fish, whereas usability training is about showing designers how to fish.

2. **Usability testing is often done at the end of a project when it is too late.**

Of course, this isn't how it should be done, but that is how it often works out. In necessity usability training is provided before a project. Indeed, even if it comes after a project, training is useful on nearly every subsequent project. Designers and developers can apply tools and methods to their own work, without the intervention of a specialist. They can do quick and dirty testing, apply heuristics, and so much more.

- 3. Usability testing is more complex than usability training.**

Because it is generally more complex and more focused, it consumes more time and also more expensive.
- 4. Usability testing is often too focused and too isolated.**

It is nearly impossible to run a usability test and get results that apply to other projects. The results are targeted and do not generalize. However, usability training is always general. It is about helping people think about customers. It is about getting the right people involved with the customers at the center of the project, not the technology.
- 5. Usability specialists who are focused on research and testing make it hard time explaining their complex results to designers and developers.**

In my experience, knowledge transfer issues are far less prevalent with usability training than with usability testing. Indeed, usability training is focused primarily on the issue of knowledge transfer, whereas usability testing is focused primarily on applying a process. The results of usability testing do not necessarily translate to action items for other projects.
- 6. Usability testing is nearly always more expensive than usability training.**

As a long-term investment, usability testing generally produces one-time results. The returns are limited to one project. In contrast, usability training is about generating long-term returns.
- 7. Usability testing often leaves developers out of the loop until it is too late.**

Developers often have key insights that are left out of usability research projects. For example, a usability test might generate great recommendations that are not feasible. Usability training eliminates this disconnect.
- 8. If you teach developers to apply even simple usability techniques, usability specialists can focus on the hard questions.**

This is a win-win proposition because it gets the developers and designers involved in usability and users, but it frees up the professionals to tackle the harder problems they tend to prefer.
- 9. Usability has the greatest impact when it is part of the culture.**

organization.

Overall, training is often a better investment than testing because it takes energy, produces long-term benefits, and transfers essential knowledge to and developers. It helps usability specialists, designers, and developers be productive. Training provides huge value in getting more people to focus on which is ultimately what is needed to improve project quality and the bottlenecks in the process.

How to choose between usability testing and usability training

I'll conclude with a refinement of the points made above. It can be hard to choose between spending money on usability testing and usability training. You should do both. You should do training if you want to eliminate the more basic usability issues, and if you want to "bake" usability into the culture of an organization. Even if training is appropriate, there will still be many, many usability problems to solve (the most difficult ones!), so you will still need specialists. In a sense, usability training moves basic usability testing from the hands of designers and developers, whereas the most difficult and perplexing usability issues will continue to be solved by usability specialists.

Here are some heuristics to help you make the right choice.

Budgets

When should you test and when should you train? If budgets are limited, it usually makes the most sense to train designers and developers. Even two or three days of usability training (a relatively small investment) can make a big difference. Usability testing is expensive-research and analysis are cheap if you want to do it right. Of course, you need to pick a usability specialist, and that costs more than testing; training presents its own challenges.

Scope of issues

It often makes sense to train when there are broad issues to tackle. If you want to address a specific usability problem then you will probably want to do usability testing, but if you want to improve the skills of your designers and developers, then usability training is the way to go.

Culture shift

Usability testing is the perfect tool to change the culture of a company. If there to listen to customers and learn from them, then training is the perfect vehicle. customers is a skill that can be taught to designers and developers. Once usability via training, and the developers and designers buy into it, the culture of the company slowly change. Usability training is ideal for your top developers, those who are move to the next level of design. Note that executives and managers can benefit from training too. You'll get a much more rapid culture change by involving top managers can easily take a top-down or bottom-up approach to training, or you can do both. either case, you can more easily change the culture of company through usability training than usability testing.

In short, if you have a big budget, focused questions, and your designers and developers already understand usability, then, by all means, attack problems with usability testing. However, if you want to maximize your investment in usability, want to bridge the gap between designers and usability specialists, or if you want to create a customer-focused culture, then I strongly recommend usability training.

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John S. Rhodes cannot fly. However, he is the founder and principal of **Onward Consulting**, a consulting organization that is focused on solving the problems that people have with technology. He also runs **WebWord**, which is one of the oldest and best blogs on usability. In his spare time, John runs marathons, juggles flaming torches, and travels around the globe. Throw him an email at john (at) webword.com, if you have any questions.

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July 7, 2005 at 6:51 am

I think what John is trying to point out is that with a limited budget and experience with usability professionals he would prefer to have the usability people provide insite to the designers/developers. There is some truth to what John says about usability people not being able to design, most come from a non design background and have read all the literature about usability, but very few have a background in design and this is a major limitation to the usability environment. As people adapt to the new technologies usability should also adapt to the abilities of the users. We can not treat everyone as an novice and design for that, there has to be a middle ground. Usability needs to evolve as the users and technology evolves.

Alok Jain

March 29, 2006 at 6:55 pm

I think it depends on what is the problem you are trying to solve. The Usability field seems to assume every interface has same goals but Usability itself is not an absolute. There are trade-offs in usability and the biggest one I believe is between efficiency v/s intuitiveness.

Mostly usability tends to get associated with intuitiveness, which I disagree with. It has to be based on user goals

Let me take an example, if you are building an application a call center, the main goal (tied to their appraisal) is to complete max # of calls per unit of time.

etc etc..

The goal is efficiency. In such scenario it is fine to let intuitiveness take seat and can be supported with training.

But if the base goal of system requires greater intuitiveness then there point investing in training alone.

I agree that budget constraints would require alterations to process and more efficient mechanisms but conclusion that training is better would be the right one.

Anonymous

April 5, 2007 at 5:38 pm

If I had \$10,000 I would keep usability fully in the project. Don't succumb to "either/or" statements, but how can we get user input AND remain cost effective?

You see, you can have testing early and cheap. Use paper prototyping as part of development for testing. Walk down the hallway of your building and ask people to walk through the pencil sketch, wireframe or mockup. Ask questions like "what would you do first if you needed to enter your expense report, what would you do without first", etc. Granted this is very informal, but you can gain an understanding of the UI by asking 15 people – 5 minutes a piece. If my dev team needs an answer today, I can get very close to accurate in 75 minutes.

Also, I use UT to show our success rates for CBA – not only for enhancement

Lastly, training over testing can be very expensive. Our accounting company is one of the largest in the nation/world with multiple offices in every state and nation and abroad. We have a large amount of new hires who are here – just out of college for their first big job. Can you imagine the training costs? In this case, it would be well over \$10,000.

Daniel Szuc

January 29, 2005 at 8:17 pm

John raises some great points.

The importance of asking the right user research questions and helping Managers to define/design products in the right direction that helps employees and the business make more monies.

How to bridge usability testing and user research data into designs that help the business positively. Often a huge gap can appear between the testing data and how this data can be used to drive the design more effectively.

Suggest there is also an wonderful opportunity for usability folks to move from a tools (bottom up approach) to assisting drive products strategy (top down approach). As we plan to pass on the knowledge and tools to who need it most.

Hiya John,

I think I agree w/ your overall statement. That if I have \$10k to put into testing, wouldn't that be better spent on training designers to be better at self analysis. I tend to agree with this sentiment a lot.

What others have said about usability being more than just testing to me obviously ignores your major premise. There is nothing here that does not acknowledge that there can't be more to what the designer does (it is a human being w/ the ability to do many roles; so the education can just keep continuing).

The one area that I feel where this doesn't work is when the complexity of a solution reaches a critical level. I can't quantify what that level is, but I believe that when complexity reaches a certain level another central nervous system that is more experienced in specifically evaluating designs is required, that is separate from the formation and generative processes. Sometimes you just need another body with a different POV.

Sorry, comments are closed.

John S. Rhodes

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