Remote Testing Checklist

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| Time frame | More than 3 weeks before testing week | Three weeks before testing week | Two weeks before testing week | The week before testing week | After testing |
| Testing dates |  |  |  |  |  |

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| **Task** | **Responsibility** | **Complete** |
| Develop research grid |  |  |
| Develop recruitment matrix |  |  |
| Consider which remote testing software is suitable |  |  |
| Contact recruitment service and provide project briefing documentation, including the recruitment matrix |  |  |
| Begin to develop testing prototypes, for example, the online questionnaire |  |  |
| Develop/agree wording for recruitment advert |  |  |
| Book an area for the interviewer to use if necessary, for example, a private room in your office |  |  |
| Complete participant instructions – include what programme they’ll be using and the step-by-step set-up |  |  |
| Finalise interview materials such as topic guides, observation and routing documents, consent forms |  |  |
| Organise a pre-briefing with those involved in testing to discuss how the test will look. Share the topic guide and allow sufficient time for familiarisation. |  |  |
| Ensure any recruitment ads go live |  |  |
| Review the participant profiles from the recruitment service to ensure participants fit the recruitment brief |  |  |
| Set up and run a testing briefing early this week. This might include a “practice run” of the session. Test any software being used to ensure it works as expected |  |  |
| Send respondent instructions, information leaflets and/ or consent forms alongside a reminder email |  |  |
| Prepare interviewer packs. Include:   1. Topic Guide 2. Observation Routing doc |  |  |
| Place interviews into colleague’s calendars |  |  |
| Organise and charge technology, including Dictaphones or recording software |  |  |
| Prepare transcription document |  |  |
| Prepare an audit trail (if applicable) |  |  |
| Upload recordings to secure area |  |  |
| Follow up to ensure participant wellbeing |  |  |
| Organise and run testing debrief with relevant colleagues |  |  |
| Transcribe interviews |  |  |
| Analyse |  |  |
| Share findings |  |  |
| Update Audit Trail |  |  |