UX Feedback Collection Guidebook

Integrating Feedback Collection from High-risk Users into Existing Training Practices

Last Updated: September 2019

USABLE

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Acknowledgments

Since 2015, the USABLE (Usable Security Apps By Leveraging End Users) project has worked with over 50 trainers from around the globe, 11 designers and UX experts, and 7 open source tool teams who build products that focus on privacy and security for high-risk communities to develop and test these feedback collection activities.

The USABLE team would like to give our deepest thanks to the digital security trainers, usability experts, open source development tool teams, and at-risk communities around the world who we have been honored and lucky to work with along the way. Without the enthusiasm and willingness of these groups to explore and experiment with a new, long-term approach to improving the tool development / training / usage cycle, this resource would not be possible. The trainers the USABLE team worked with developed, piloted, and refined these activities and provided feedback that allowed the USABLE team to make critical improvements and adaptations. In total, the project has engaged with over 430 at-risk end users, developed 84 user personas, and collected over 180 individual pieces of user feedback.

Special thanks to the trainers, developers, and desigers who further took time to review and contribute valuable feedback to this guidebook: Mario Felaco (Conexo), Helen Nyinakiiza, Robert Hansen (Enigmail), Soraya Okuda (Electronic Frontier Foundation), Georgia Bullen (SimplySecure), and Nancy Reyes (Accessibility Lab).

This resource would not have been possible without the support of Internews' USABLE team: Adriana Balcazar, Amelia Ayoob, Ashley Fowler, Megan DeBlois, and Jon Camfield.

The USABLE program and this resource were made possible with financial support from the U.S. Department of State - Bureau of Democracy, Human Rights and Labor.

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Introduction

Many of the most at-risk communities around the globe rely on open source privacy and security tools. However, these tools are often designed, developed, and maintained by individuals or small teams who have little to no access to their target audience — journalists, activists, human rights defenders, and other high-risk groups. This often results in tools that poorly fit the threats, challenges, and/or accessibility or usability requirements of end-users. Internews and the USABLE Team have worked with many community members across the globe to support tool developers who want to better understand their users' needs, security practices, and operating environment, **establishing stronger feedback loops between the communities who make the tools and the communities who use them.**

What is the purpose of this guidebook?

When developers receive feedback and insights into end-users' needs, practices, and operating environments, they are able to employ more ***human-centered design*** (See Appendix A) approaches, resulting in usable and accessible products that reflect the needs of real users. The UX Feedback Collection Guidebook aims to facilitate feedback loops between users and tool developers by equipping digital security trainers and other trusted facilitators with the skills and resources they need to:

1. Safely gather information around end-users' needs, practices, and operating environments
2. Collect tool-specific feedback from at-risk users
3. Synthesize, prioritize, and structure information or feedback
4. Share information or feedback with relevant developers or tool teams

The guidebook is a compilation of activities designed to integrate user-feedback collection into existing digital security training frameworks. The four-part resource contains:

- background information,
- facilitation instructions,
- editable templates, and
- guidance on communicating with tool developers.

Most activities were inspired by existing formal methods of feedback collection and were adapted by the USABLE team, digital security trainers, and user-experience (UX) specialists as part of the larger USABLE project (https://usable.tools). The activities take into account the specific limitations of open source projects and the sensitivities around working with high-risk communities.

Who should use it?

The guidebook can be used by a variety of practitioners including digital security trainers (new or experienced), user-experience (UX) specialists, trusted facilitators, and open source tool teams. **The resource will help these practitioners understand the value and process of capturing feedback where possible and how to share it with developers**. When done effectively, this process can transform the design and development of the most commonly used privacy and security tools for at-risk users.

What skills are required?

Prerequisites to working with high-risk users under any circumstances are trust and competence. If you are unsure whether or not you are the right person for the job, a great place to start is the Electronic Frontier Foundation's Security Education Companion articles: "*Am I the Right Person?*" and "Harm Reduction Approach".[2] To successfully implement the activities within this resource, the facilitator should have a strong relationship with the participants built on mutual trust.

All sessions are meant to integrate into any existing digital security training curricula. For more guidance on developing a digital safety curriculum, visit level-up.cc. LevelUp is a collection of community-created resources and is based on the ADIDS Approach (Activity-Discussion-Inputs-Deepening-Synthesis) to adult learning. This Medium article by Martin Shelton tracks additional updated digital security guides and training resources.

What if I have time constraints?

It is important to note up front that there are inherent trade-offs involved in integrating feedback work into digital security trainings. The goal of training is to increase knowledge and enhance the skills of the participants. The goal of gathering feedback is to contribute to the design and development process of the tools themselves. Providing critical security skills must always come first. However, the activities outlined below are designed to be flexible, fit within existing training approaches, and, most importantly, contribute to long-term change in user-experience. More user-friendly tools will make trainings better for everyone, eventually reducing the time required in the future to explain and train on specific products.

In the real world, trainers and facilitators often face significant time constraints and competing priorities during digital security trainings. **These feedback collection activities were designed with this in mind and aim to be as straight-forward and time efficient as possible**. Feedback collection does not need to be a time-consuming process requiring extensive resources or skills. In fact, valuable information and tool feedback can be collected quite easily with strong facilitation. In the next section, please review specific guidance on how to select a feedback collection activity to run during your next training or event.

What if I want to collect feedback without combining it with a training?

If you are interested in collecting feedback outside of a "traditional" training, Part III: Collecting Feedback Outside of Trainings of this guidebook offers alternative options including:

- In-Person Developer Engagement
- Digital Security Trainer Meet-Ups (to Document, Synthesize, and Prioritize Tool-Specific Feedback or Create User Personas)
- Tool Feedback Session at International or Local Events
- Collecting Feedback Virtually

Navigating the Guidebook

The UX Feedback Collection Guidebook is broken down into four thematic sections:

Part I: Collecting Feedback to Better Understand the User
Part II: Collecting Tool-specific Feedback During Trainings
Part III: Collecting Feedback Outside of Trainings
Part IV: Communicating with Developers and Tool Teams

Each activity includes:

- a brief summary,
- list of required resources,
- actions that must be completed before the activity,
- a facilitation guide,
- discussion questions, and
- relevant templates.

Any of the activities may be adapted or localized to fit the context or situation. Templates have been developed using Google Slides to ensure ease of translation or adaptation.

Part I: Collecting Feedback to Better Understand the User	The first set of activities focuses on feedback to better understand the user, or participants in a training. These activities are designed to capture users' needs, current practices, and operating environment challenges of at-risk individuals and communities. Similar to digital security trainers who are better equipped to design and implement relevant trainings when they are more aware of the needs and risks of their participants, privacy and security tool developers are more likely to meet the needs of at-risk users when they too have this knowledge. **Activities in this section are listed by the length of time it takes to facilitate. Those that require less time are listed first.**
Part II: Collecting Tool-specific Feedback During Trainings	The second set of activities focuses on capturing tool-specific user feedback. These activities capture usability and accessibility challenges that prevent at-risk users from more easily adopting tools. **Activities in this section are listed by the length of time it takes to facilitate. Those that require less time are listed first.**
Part III: Collecting Feedback Outside of Trainings	The third set of activities provides options for facilitators who do not have time during a training or event, but are still interested in documenting and sharing feedback with developers and tool teams. These activities can be facilitated outside of more "traditional" dedicated trainings.
Part IV: Communicating with Developers and Tool Teams	The fourth and final section includes recommendations and guidance for digital security trainers and user experience experts who may be less familiar with communicating with open source tool teams. From communication channels to best practices, this section will provide facilitators with the basic skills needed to connect with tool teams and share relevant feedback.

How to select an activity?

It is not necessary to integrate every activity into your training or event. As the facilitator, you should select which activities to run based on your available resources and time. You may select one activity to integrate into your existing training or combine multiple activities from this resource to create a standalone feedback collection event. This resource is designed to make the feedback collection process as straight-forward and time efficient as possible for the facilitator.

A complete list of every activity (including the Activity Name, Feedback Type, Time Required, and Outputs/Impact) is available in Appendix B, and each section leads with a summary of the activities within it to assist with the selection process.

There are several key factors that will change the specific approach used to implement these activities. As the facilitator, you will need to select a feedback collection activity to run based on the following considerations:

1. **Time:** For every activity, there is a time estimate for the facilitator. Time will vary depending on how many of the prepared materials, templates, and resources provided must be adapted in advance, and how much time it takes the trainer or facilitator to synthesize the information afterward. We highly recommend reviewing any additional materials that will need to be prepared before or after each activity, in addition to choosing based on the amount of time you may have to dedicate to feedback collection during your training or event.

2. **Relevance:** Whether you might be hosting an event or implementing a training, an agenda can guide the event and help set expectations of those who are attending. It is up to the facilitator to determine an appropriate agenda and then based on this, look for feedback collection activities that would be most relevant and feasible. For example, if you are running a training, but are not showcasing or doing any walk-throughs on tools, you would want to focus mainly on Part I: Feedback Collection to Better Understand the User.For more resources on building a relevant and useful agenda for training, see Internews' resources such as SaferJourno or LevelUp, or the Electronic Frontier Foundations' Security Education Companion.

3. **Resources:** Before beginning any of the activities outlined below, consider the resources that may be required. Types of resources may include:
   - **Supplies:** Some activities require printed materials, software, or specific devices. For example, if you want to test the accessibility of a tool, you will want screen reader software, speakers, and a way to cover the screen.
   - **Budget:** Some activities require travel budget for a member of a tool team or training participants. You may also consider providing snacks, meals, or other incentives for participants or attendees.
   - **People:** Some of the user-feedback activities require additional human resources such as a co-trainer or notetaker. Also consider the ***tool developers*** — where possible, reach out to the developers of tools you intend to train on and see if they can be available to join remotely (or even in person, depending on budget, location, and timing). Even a quick, post-training question and answer session may reveal "hidden" functionality, upcoming changes, or inform the tool's development roadmap!

Considerations for Tool-specific Feedback

Trainers should have the ability and framework to do quick research on tools before beginning the feedback collection process. This quick checklist helps trainers and trusted facilitators determine whether or not they should choose to spend time collecting feedback on a particular tool.

Prior to beginning feedback collection on **ANY** specific tool, it is important to consider the following:

Is the project active? Is the project sustainable?

Before doing anything else, ensure the project is currently active. This means developers are currently working to update and make improvements on the product. With many open source projects, development may fluctuate due to lack of funding, volunteers, or time. In order to assist trainers and facilitators interested in giving tool-specific feedback, please refer to the checklist below to ensure the tool is actively maintained.

- Begin with a Google search.
- Explore the project's website to find where they host their code. This is often GitHub, but could also be GitLab, SourceForge or a custom site for larger projects.
- Check for information on OpenHub.net (https://openhub.net). OpenHub is a platform that gives you immediate data around current open source projects hosted on GitHub. Simply type the name of a tool in the search function and the output is a status report of the project.
- Reference the criteria used by the Open Integrity Index by iilab (https://openintegrity.org/framework/tool_selection_criteria/).
- Additional considerations may also be taken depending on your context or concerns within the high-risk community you're working with - e.g., has the tool been audited or peer-reviewed?

It can also be helpful to check if the project seems to be stable. Does the project have funding? Is it part of an organization? This is often harder to determine, but can save a lot of wasted effort.

Is there a way to submit feedback? Is there a preferred method of feedback submission (specifically for user-feedback)?

To maximize the impact of the feedback you are able to collect, look up the tool developers and how to contact them in advance. It can be frustrating to collect valuable feedback, but have no one to share it with. See Part IV: Communicating with Developers and Tool Teams.

You may not always be able to know which method of feedback is preferred. If you do and you are comfortable or familiar with this method, contact the developers through this channel. If not, submit the feedback via the method with which you feel most comfortable. Submitting feedback via a less common channel is better than submitting no feedback.

To make things a bit easier, USABLE has put together a quick list of products that have been vocal about wanting feedback from their users. This list of tools can be found as Appendix C.

Part I:
Collecting Feedback to Better Understand the User

This set of activities focuses on better understanding the users, or participants, who are the target user-group for specific open source security and privacy tools.

These activities are designed to capture:

- Current practices,
- User needs,
- Operating environment challenges,
- Risks and threats, and
- Common user questions.

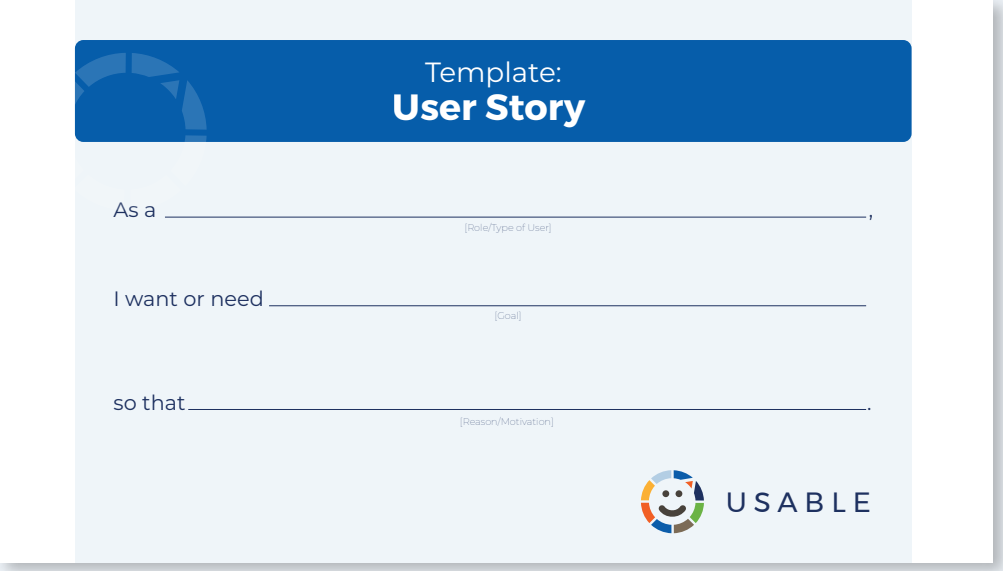
Digital security trainers are better equipped to design and implement relevant and responsive trainings when they are fully aware of the needs and risks of their participants. Similarly, privacy and security tools are more likely to meet the needs of at-risk users when tool teams are designing and developing with these particular users in mind.

Activity	Feedback	Time	Outputs/Impact
User Stories	User-focused	30-45 mins	*User Stories* help developers clearly identify specific needs of a community
Mapping Digital Security Practices, Concerns, and Questions	User-focused	45-60 mins	Collection of user practices and concerns helps developers better threat model and design their products
Persona Generation	User-focused	60-90 mins	Community-representational *User Personas* can be shared with a variety of developers and designers

Activity: User Stories

Summary

User stories are short descriptions that capture the wants and needs of real users. These stories help tool teams understand the ultimate goal of the user, which can inform feature or tool development. They typically follow a very simple template. A sample framework can be found below. Ideally, a user story will tell tool teams exactly why and how a person is using their tool.



Feel free to adapt the "verb" to accommodate how the participants are discussing their problems - see these examples:

- *As a journalist, I **want** to be able to securely communicate with sources, so that I can protect my information and sources.*
- As a journalist, I ***want*** to protect my information and my sources, so I need a secure way to communicate with sources.
- As a journalist, I **worry** that my information and sources may be compromised. I need to know that my communications are secure.
- As a human rights defender, I am **afraid** that I am being surveilled. I need a way to prevent my communications and information from falling into the wrong hands.

Time Required

This activity runs between 30 and 45 minutes.

Required Resources

- Examples of user stories
- User Story Template
- Writing Utensils

Before the Activity

Prior to the activity, the facilitator should explain what a user story is and how it is useful for tool teams (providing context about user needs and behaviors). The facilitator should also print out the User Story Template. Each participant should receive a copy.

Facilitating the Activity

To begin, the facilitator should share several examples of effective user stories. Examples may be pulled from trusted sources or created by the facilitator.

The facilitator should then spend a few minutes brainstorming with the group about their goals when using privacy and security tools. This general brainstorm will provide ideas for the individual development of user stories. **Instead of focusing on a specific technological solution, the user story should focus on the human and their specific goal or need.**

The facilitator should ask each participant to develop their individual user stories using the template provided (Appendix D).

Discussion

Once the user stories are complete, the participants should present to one another. The facilitator can use this time to clarify stories that may be unclear or too vague. If the activity is focused on a specific tool, these stories may already be focused enough.

However, if the stories are higher-level, around a concept or set of needs (e.g., "password management"), it can be useful to provide further context to the story. To do this, the facilitator can introduce the "**Five Whys**" technique to help participants build out the user story more fully. In order to get to the underlying or root causes of an issue, the user should repeatedly ask: "why?" Each answer will form the basis of the next question. This process will allow users to capture multiple causes for issues or challenges they are facing. Please see the example below.

User Story:

As a nonprofit employee, I'm worried about losing or forgetting my password, so I write it on a sticky note that I keep by my desk.

1. **Why?** They keep forgetting their passwords and must be able to login to their computers.
2. **Why?** They attended a training where they learned passwords must have certain characteristics (at least X characters, upper-case, lower-case, numbers, and special characters) and were not able to memorize them.
3. **Why?** The passwords were too complex to memorize and they don't want to be locked out.
4. **Why?** They have a part-time IT staff member offsite and being locked out means significant delay of work.
5. **Why?** They cannot afford a full-time, onsite IT person.

The answers to these questions can help reveal additional barriers and context around the user story and make them more broadly useful for both tool developers as well as the trainers, who can refine their understanding of the nuances of the community.

Review and Follow-up

Following the activity, the facilitator should collect the user stories and review the content. The facilitator should ensure that the story provided is relevant and useful. If more information or context is needed, the facilitator should follow-up with participants.

Before sharing the user stories with developers, designers, or tool teams, the facilitator will need to digitize, format, and possibly translate the user stories. To ease this process, the USABLE User Story Template is available via Google Slides.

Activity: Mapping Digital Security Practices, Concerns, and Questions

Summary

When working with at-risk communities, it is essential to build trust and understand participant or user needs, This quick interactive session is designed to collect a large amount of information in a short period of time.

Time Required

This activity runs between 45 and 60 minutes.

Required Resources

- Sticky Notes
- Writing Utensils
- A Whiteboard, Wall, or Other Flat Surface

Before the Activity

The facilitator should distribute sticky notes to each participant, making sure each person has multiple sticky notes in three different colors.

Facilitating the Activity

To begin, the facilitator delegates the following categories to three different colored sticky notes: Current Digital Security Practices; Security Concerns; and Questions/ Topics or Tools You Want to Learn.

1. Current Digital Security Practices: What current measures are the participant or user taking to protect their information, communicate securely, etc.?
   Example: Using full disk encryption on devices, using long and strong passwords, using a password manager, etc.

2. Security Concerns: What concerns does the participant or user currently have around security and safety?
   Example: Someone who works as a human rights abuse documenter may be concerned about arrest or an office raid, which could compromise their data.

3. Questions/Topics or Tools You Want to Learn: What questions does the participant or user have with regards to security? Are there specific topics or tools that they are interested in learning more about?
   Example: A participant or user may want to learn about easier ways to encrypt their entire organization's databases and how to transfer them to other staff outside of the country securely.

The facilitator should allow participants around 5 minutes to quickly document two to three responses for each category.

After five minutes, the larger group should work together to cluster the responses within each category on a large whiteboard or wall, capturing common areas of concern and interest.

Discussion

The facilitator should begin the discussion by reviewing current practices to highlight procedures and practices already in place. The facilitator should then review outstanding security concerns. Some of these concerns may be addressed in following trainings. The discussion should end with questions, topics or tools that the group would like to explore further, as this will likely inform the remainder of the training or gathering.

Review and Follow-up

The facilitator should document the responses, either taking a photo of the whiteboard or other surface used to cluster sticky notes or collecting the sticky notes at the end of the activity. The facilitator should review and prioritize the responses. The behaviors, concerns, and questions from participants could be used to create user personas, design future trainings, or develop user stories to be shared with tool teams.

Activity: Persona Generation

WARNING FOR FACILITATOR: Personas should not be real people. They are meant to be a compilation of characteristics relevant to a specific community or demographic. Be sure to remove any personal information from personas, including real names, locations, organization names, age, etc.

For examples, see: https://usable.tools/personas

Summary

The objective of the Persona Generation activity is to develop real-world examples of community profiles that highlight non-sensitive pieces of information that could help inform tool teams and build empathy in their development process.

What is a Persona?

A *persona* is a fictional "character", or "profile" of a user, that represents a summary of real, community-wide characteristics. The *persona* synthesizes community-level challenges, needs, and practices, in order **to build a greater understanding and empathy for the end-users by the people creating the tools - people who will likely never meet their users and vice versa.**

Personas facilitate the creation of user stories and more concrete use-cases for their products. Too often developers in the open source community rely on assumptions from their respective locations and experiences, which can be dramatically different than those high-risk groups using their products. Whether they are designing for a human rights activist in China or a journalist reporting on the frontlines in Crimea, for developers to design products that are useful and usable, they must better understand who their users are, their motivations, and their willingness to adopt such important security tools.

Personas can also be valuable for digital security trainers, allowing them to better understand their participants in trainings. This understanding of participant needs, risks, and the work they do can inform the design of the digital security training – helping the trainer determine what topics should be covered and the best mitigation strategies to recommend. Trainers may also use personas to facilitate threat-modeling activities during training. Participants are sometimes more willing to discuss risky behaviors when they are referencing a fictional character, such as a persona, instead of themselves as a user.

The Persona Generation activity includes:

- a brief explanation of personas,
- an introduction to the persona template, and
- time to practice developing personas based on real needs and risks.

Outputs include a collection of information specific to the communities with which the facilitator is working. Participants will gain a basic understanding of what a persona is and practice generating personas that reflect their own communities' needs; however, they will not be trained on how to develop personas more broadly and it will be the facilitator's responsibility to review, remove personal information, and finalize the personas generated during this activity.

Time Required

This activity runs between 60 and 90 minutes.

Required Resources

- Pre-Reading:
  - Using Personas in Open Source Projects
  - User Personas for Privacy and Security
- Persona Template
- Writing Utensils
- Review Examples of Personas:
  - USABLE Personas
  - Okthanks Personas
  - SimplySecure Personas
  - Gus Andrews Personas

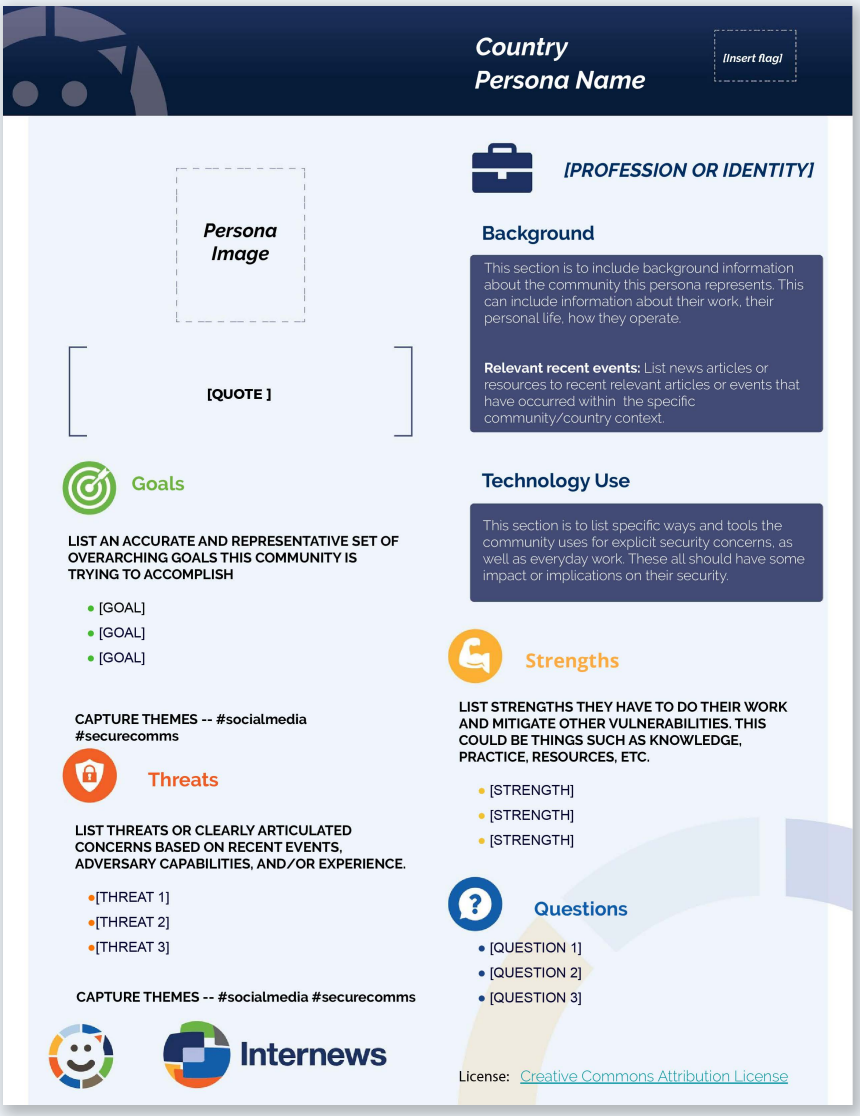
Before the Activity

Most participants will likely be unfamiliar with the concept of personas and therefore it is critical to explain what they are and how to create them. The facilitator should prepare and provide a brief explanation of the purpose of user personas:

- What they are
- How they are used
- Why they are important

Once you describe the objectives of the activity and purpose of personas, the facilitator will then walk-through in detail each component of the persona template, giving examples of each or referencing existing personas listed in the resources above.

While the goal is to capture real needs, practices, and threats, **the final persona should be fictional and not an exact representation of a real individual**. Participants should be encouraged to pull from multiple people to create a user that embodies the needs of a specific community or type of user, without linking the persona directly back to a real person. This is important when working with at-risk communities as it could be dangerous to identify real people in a persona. For example, documenting the specific story or profile of an LGBTQIA person in a persona could put them at risk in their home environment. It is also important to note that there are many different templates for user personas and the process of generating a persona can vary based on both its intended purpose and audience.



Facilitating the Activity

Following the persona overview, the facilitator should provide each person with a copy of the USABLE Persona Template. This template can be found as Appendix E. A description of each section and potential guiding questions can be found below.

- **Demographic Information:** Information such as name, general age range, country, and profession provide context for the overall community.
- **Quote:** Attention-grabbing quote that captures the personality of the persona.
- **Description of the person:** A 6-8 sentence description of the person, including details such as their daily activities, community, and what they do. This can also be a good place to include country-specific context for threats and risks faced. Additional questions to guide the development of this section can be found below:
  - Are there other pieces of demographic information that may be helpful in understanding this persona (gender, gender identity, sexual orientation, belief system/religion, etc.)?
  - Are there any relevant laws the tool team should know about this country/context? For example, are there laws criminalizing LGBTQ people? Are there laws that restrict freedom of speech and expression, or privacy?
  - What else does this persona do in their free time? Are they a photographer, activist, blogger?
  - Is this persona well known in the community? Do they have a community or support system?
  - Are there any relevant news stories that illustrate criminal cases or conditions for human rights defenders in this country?
  - Are there any relevant findings from the Freedom of the Net report?
  - What languages does this persona speak?
  - Would this persona need or benefit from using accessibility software, such as a screen reader?
  - Are there other considerations that may impact this persona's ability to use a tool (e.g., limited vision)?
- **Why/How they use technology:** List any social media, messaging platforms, or other tools used by the persona. Also capture the type of device, browser, etc. when relevant. Include the frequency of use and what each tool is used for. Additional questions to guide the development of this section can be found below:
  - What tools do they use to communicate with other people?
    - How do they communicate with friends?
    - How do they communicate with colleagues?
    - How do they communicate with other groups they are involved in?

- What social media platforms do they use? How and for what purpose? Are their profiles personal, professional, or both?
- What is this persona's technical skill level?
- Who does this persona go to for technical support?
- How does this persona identify new tools? Who trains them on these new tools?

- **Goals and motivators:** What is the persona attempting to accomplish? This can be their long-term work goal (advocacy, documenting human rights violations, protecting their community, etc.) or more specific to privacy and security (data protection, secure communication, etc.)
- **Threats and risks:** What threats or risks is this persona facing? This may include surveillance, harassment, arrest, etc. Where possible, also document the adversary (the government, extremist groups, etc.). Additional questions to guide the development of this section can be found below:
  - Does this persona connect to open/public WiFi networks?
  - What sort of surveillance technology does their government or adversary have?
  - Are there multiple groups targeting this individual?
  - Is this persona sharing information that would put themselves or their community at risk if leaked?
- **Strengths:** What actions is this persona already taking or what skills do they have already which make them more secure.
  - Is the persona fluent in English (the language of most digital safety guides, tools, etc.)?
  - Do they use two-factor authentication?
  - Do they always update their software?
  - Are they a strong, trusted leader in their community?
- **Questions:** Capture key questions that this persona may have about risks, privacy, security, or specific tools or platforms.

After reviewing the template and each section together, participants are then asked to generate their own persona. This allows participants to spend time developing a user profile based on their own experiences or the experiences of a community they know well. The facilitator should once again remind participants that the persona should not be based on one single individual and no personal identifying information should be included. Participants can develop the personas individually or in small groups, depending on the size of the group and their comfort level with the exercise.

Discussion

Once each participant has completed their personas, willing participants should present their personas to the group. Another option, if folks are less comfortable in a group setting, is to present personas to a smaller group or pair up. Depending on time, the facilitator may allow time for several to be presented to everyone, then split into small groups to provide more in-depth feedback. Below are sample questions that may be used during the small and large group discussions. These questions will help participants begin to consider threat-models for their specific communities and possible strategies to mitigate these threats.

- Do you feel like you have a good understanding of the persona's needs?
- What parts of developing a persona are difficult? What parts are easy?
- What challenges did you face when creating the persona?
- What are the top three things a developer should know about this person?
- What strategies would you recommend to this persona to mitigate their threats?
- What are feasible, actionable next steps that this persona can take to be more secure?

Review and Follow-up

Following the activity, the facilitator should collect the user personas that were created and review the content. It is the facilitator's responsibility to remove any sensitive or personal details that may reveal the identity of the real individual or individuals.

Examples of information that should be removed from personas:

- Real name of the individual or individuals
- Names of specific cities or towns (particularly small towns)
- Names of specific organizations or publications
- Circumstances or situations that are specific to one person (a case or profile that may have received a lot of public attention and would therefore be easy to trace back to a specific person).

When reviewing personas, the facilitator should make sure the language is vague enough to be safe, but thorough enough to be useful. In some cases, the facilitator may need to follow-up with participants if they did not provide enough information.

Finally, if the facilitator plans to share the personas with developers, designers, or tool teams, they will also need to transfer the information into a digital format, and possibly translate content. To ease this process, the USABLE template is available via Google Slides.

Personas can also be shared via the USABLE.tools site - please contact the team via email at connect@USABLE.tools to share new personas.

Part II:
Collecting Tool-specific Feedback During Trainings

This set of activities focuses on capturing tool-specific user feedback. These activities are designed to capture usability and accessibility challenges that prevent at-risk users from easily adopting tools. Once shared with developers, this tool-specific feedback will lead to the design and development of more usable and accessible privacy and security tools for at-risk users that need them most. All outputs can be shared with developers to inform design or development processes and decisions.

Activity	Feedback	Time	Outputs/Impact
Pluses vs. Deltas	Tool-specific	15-30 mins	Collection of likes and dislikes of a specific tool to inform design and development changes or determine priorities
Mark-up a Screen - shot	Tool-specific	30-45 mins	Collection of tool-specific usability and accessibility recommendations
Tool Task Ranking (as an individual)	Tool-specific	30-45 mins	Participants' rankings of various tasks related to a specific tool on a 1-5 scale, with 1 being easy and 5 being difficult
User and Observer Activity	Tool-specific	45-60 mins	Collection of tool-specific feedback documenting the step-by-step process of installing, setting up, and using a privacy or security tool
Tool Matrix: Plot - ting Usability vs. Adoption	Tool-specific	45-60 mins	A tool matrix capturing the software and products the community uses and where users are having the most challenges with regards to usability and tool adoption
Tool Task Usabil - ity Ranking (as a group)	Tool-specific	45-60 mins	A summary of user pain points when using different tools, and comparison across tools concerning usability on a particular task
Tool-Specific Task Usability Ranking (as a group)	Tool-specific	45-60 mins	Identification of usability challenges for a specific tool, and a way to more quickly prioritize improvements based on the comparison of tasks

Activity: Pluses vs. Deltas

Summary

This activity allows users or participants to quickly document their pluses (things they liked) and deltas (things they would like to see changed) about a specific tool. It is meant to be used as a supplement to a digital security training when teaching a specific product and should be facilitated after introducing or training participants on a new tool. This activity could also be facilitated with participants that have previously used or are familiar with the specific tool.

Time Required

This activity runs between 15 and 30 minutes.

Required Resources

- Sticky Notes
- Writing Utensils for Participants
- A Whiteboard, Wall, or Other Flat Surface

Before the Activity

Prior to the activity, the facilitator should identify a relevant tool that is being used by the participants. Each participant will also need several sticky notes in two different colors.

Facilitating the Activity

To begin, the facilitator delegates the following categories to two different colored sticky notes: Pluses and Deltas.

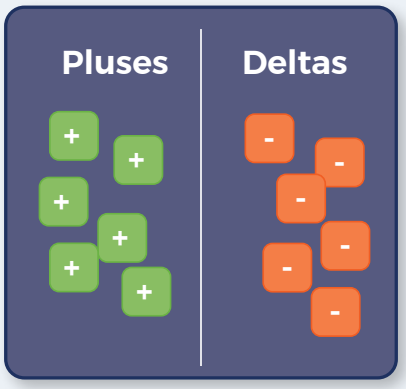
1. Pluses: What aspects of this tool or application do you like? What areas are particularly easy to use? Why would you recommend this tool to a friend or colleague?

2. Deltas: What aspects of this tool or application do you dislike? Are there any blockers that would prevent you from using this tool (e.g., not compatible with a screen reader)? Are there device or software limitations that would prevent you from being able to use this tool or application (e.g., does it require a newer version of an operating system that your device cannot support)? What areas

of the tool are difficult to use or cause frustration? What areas of the tool are difficult to understand or explain to others?

The facilitator should allow participants around 5 minutes to quickly document three to five responses for each category. It is also helpful to remind participants that **there are no small pain points**. Any frustration or point of confusion is worth documenting.

After five minutes, the larger group should work together to cluster the responses within each category on a large whiteboard or wall, capturing common areas of concern and interest.



Discussion

Once the participants have clustered the sticky notes, the facilitator will bring the group back together for a closing discussion. The facilitator should use this time to capture recurring themes or areas that multiple users found confusing or frustrating. The facilitator can also use this time to ask participants what suggestions they may have to improve the tool or application.

Review and Follow-up

The facilitator should document the sticky notes, taking a photo or collecting the sticky notes in the clusters in which they were plotted. Following the activity, the facilitator should review the results. During the review process, the facilitator should be looking for common areas of frustration or aspects of the tool that may have been difficult for multiple users. The facilitator will collate relevant feedback, including quotes and descriptions that may be useful for a developer, and synthesize feedback into concrete or actionable recommendations. The usability challenges and recommendations should be digitized and prioritized before sharing with the developer, designer, or tool team.

This review, synthesizing, and prioritization of the feedback collected allows the facilitator to remove comments that are not useful or relevant and lift up common issues that were seen across many users.

Activity: Mark-up a Screenshot

Summary

This activity is designed to capture tool-specific feedback after an initial introduction or training on a tool and is ideal for environments with limited or no bandwidth for online activities.

Time Required

This activity runs between 30 and 45 minutes.

Required Resources

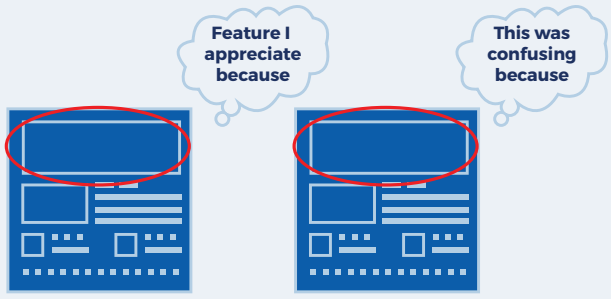
- Printed Copies of Screenshots of Tool or Application (In Original Color When Possible)
- Writing Utensils

Before the Activity

Prior to the activity, the facilitator should select a relevant tool for the community and screenshot key phases of engaging with the tool (installation, set-up, practice, etc.). The screenshots should be printed and copies made for each participant.

Facilitating the Activity

To begin the activity, the facilitator should provide a quick introduction or overview of the tool. Each participant should then receive a copy of the collection of screenshots. The facilitator should give participants 10-15 minutes to walk through the series of screenshots, asking them to mark any points of confusion or recommendations they may have to improve the tool. Participants may circle features or icons that are confusing, suggest new features, or highlight aspects of the tool that they appreciate or value.



Discussion

Once the participants have reviewed and commented on all of the screenshots, the facilitator will bring the group back together for a closing discussion. The facilitator should use this time to capture recurring themes or areas that multiple users found confusing or frustrating. If a projector and whiteboard are available, the facilitator can project the screens onto the whiteboard and capture common themes or concerns as the discussion progresses.

Review and Follow-up

The facilitator will collect the marked-up screenshots at the end of the activity and review the content. During the review process, the facilitator should be looking for common areas of frustration or aspects of the tool that may have been difficult for multiple users. The facilitator will collate relevant feedback, including quotes and descriptions that may be useful for a developer, and synthesize feedback into concrete or actionable recommendations. The usability challenges and recommendations should be digitized and prioritized before sharing with the developer, designer, or tool team.

This review, synthesizing, and prioritization of the feedback collected allows the facilitator to remove comments that are not useful or relevant and lift up common issues that were seen across many users.

Activity: Tool Task Ranking (as an individual)

Summary

This activity allows users or participants to rank various tasks related to a specific tool on a 1-5 scale, with 1 being easy and 5 being difficult. It is meant to be used as a supplement to a digital security training when teaching a specific product and can be facilitated either during or immediately following a tool-specific training.

Time Required

This activity can be done independently, minimizing in-training time. If done entirely in person, it runs between 30 and 45 minutes, or can be reduced to between 15 and 20 minutes if done as part of a pre/post-survey.

Required Resources

- Tool Task Ranking Template
- Writing Utensils

Before the Activity

Prior to the activity, the facilitator must identify a relevant tool and compile a list of tasks that the user will complete when learning the new tool. These tasks may include installation, configuration, practice, etc. A list of sample tasks for Signal might include:

1. Create a group chat
2. Turn on disappearing messages
3. Turn off disappearing messages
4. Turn off "preview" notifications when phone is locked

Appendix H includes sample tasks for additional open source privacy and security tools.

Facilitating the Activity

The participant will be asked to rank each task on a scale of 1 to 5, with 1 being easy and 5 being difficult. There is also space for the participant to make suggestions or explain the ranking. It is important to note that this requires the facilitator to be specific about the tasks the participant will be asked to complete prior to distributing the template.

The Tool Task Ranking template can be found as Appendix I.

Discussion

While this activity does not require a discussion, the facilitator can bring the group together afterward to capture shared points of confusion or frustration as well as tasks that most users agreed were easy to complete.

Review and Follow-up

The facilitator will collect the completed Tool Task Ranking templates at the end of the activity and review the content. During the review process, the facilitator should be looking for common areas of frustration or tasks that may have been difficult for multiple users. The facilitator will collate relevant feedback, including quotes and descriptions that may be useful for a developer, and synthesize feedback into concrete or actionable recommendations. The usability challenges and recommendations should be digitized and prioritized before sharing with the developer, designer, or tool team.

This review, synthesizing, and prioritization of the feedback collected allows the facilitator to remove comments that are not useful or relevant and lift up common issues that were seen across many users.

Activity: User and Observer

Summary

This activity is designed to capture tool-specific feedback by documenting the step-by-step process of installing, setting up, and using a new privacy or security tool. The activity can be facilitated during digital security trainings by pairing participants with one another and assigning roles, either a “User” or an “Observer”, or in a one-on-one setting, in which case the facilitator would become the “Observer”.

Time Required

This activity runs between 45 and 60 minutes.

Required Resources

- User and Observer Templates
- Writing Utensils
- Devices for Testing Relevant Tool or App

Before the Activity

Prior to the activity, the facilitator should choose a tool that is both relevant for the community and receptive to feedback (see Preparation and Required Resources section for more information on selecting a tool).

Once a tool has been selected, the facilitator must document discrete tasks for the Users to complete. The tasks should fit within the three core phases (Installation, Setup, and Practice). These task-based practice scenarios are very customizable, as you can adjust them to fit the experience level of the group and base it on the type of work your participants might encounter in real life. For example, to collect feedback on Tor Browser the facilitator may assign the following tasks:

Task 1: Download (Installation)

Task 2: Start Tor Browser (Setup)

Task 3: Properly Choose Your Settings (Setup)

Task 4: Open Tor Browser (Setup/Practice)

Task 5: Verify Tor is Working (Practice)

Task 6: Access Content (Practice)

Note, it is important to begin at the download phase rather than having participants search for the software on the Internet. It is not a good use of time, and more importantly, there is too much room for error in downloading something incorrectly or the wrong software. Pointing participants at the appropriate website or location for download is much safer.

Additionally, the facilitator should provide any necessary context for why, when and how the selected tool should be used. For example, if the community is interested in secure communication, the facilitator should cover the concept of end-to-end encryption before introducing a tool and explaining how the tool works and why it is the best solution. This background knowledge will be helpful context for the participants as they complete the User and Observer Activity. It is best to facilitate this activity with first-time users who have not previously used the tool. While it can also be facilitated with users experienced with the specific tool, the feedback may be less comprehensive as users will already be familiar with the tool and its features.

Facilitating the Activity

To begin the activity, the facilitator should explain the two roles and divide participants into small groups of two or three. Within each group, the facilitator should delegate roles, preferably two Users and one Observer. Each person then receives the corresponding worksheets to complete during the exercise.

The Users will receive three User templates assigning tasks broken down into 3 categories or "phases": Installation, Setup, and Practice. Each phase will have its own worksheet. The Observer will only receive one Observer template. These templates can be found as Appendix F and G.

During the activity, Users will complete each phase, task by task. They should be vocalizing their process and thoughts as they work. The Users will also complete the three worksheets, documenting pain points or points of confusion, aspects of the tool that they like or appreciate, any questions they have about the tool, and ideas for improvement.

The Observer will watch the Users and document the experience. They will capture quotes and behaviors, as well as any ideas they may have for improvements to the

tool. By assigning two Users, the idea is that they will be able to speak out loud to one another during the exercise, making it easier for the Observer to document thoughts and behaviors.

The goal should never be to make the participants struggle through this process. In a live training scenario, it is very important for the facilitator to keep strict time during each phase and be very aware of the temperament and attitude of participants as they are going through each phase. The facilitator should be prepared to step in if a participant is continuing to struggle. The primary goal of a digital security training or tool walk-through is to make sure that participants know how to properly use the tool. Feedback collection is a secondary goal and should not impede the participants ability to learn a new concept or tool. Please refer back to "*What if I have time constraints?*" in the introduction for additional guidance or consider using a different activity if this one is not meeting your participants' needs in your training.

Discussion

After each phase is completed, the facilitator should hold a quick discussion, taking notes on participant thoughts on the tool and any ideas or recommendations for improvement. The facilitator should then go through each task to answer questions and make certain participants know how to properly use the tool.

Review and Follow-up

The facilitator will collect the completed User and Observer worksheets at the end of the activity and review the content. During the review process, the facilitator should be looking for common areas of frustration or tasks that may have been difficult for multiple users. The facilitator will collate relevant feedback, including quotes and descriptions that may be useful for a developer, and synthesize feedback into concrete or actionable recommendations. The recommendations should be digitized and prioritized before sharing with the developer, designer, or tool team.

This review, synthesizing, and prioritization of the feedback collected allows the facilitator to remove comments that are not useful or relevant and lift up common issues that were seen across many users.

Activity: Tool Matrix, Plotting Usability vs. Adoption

Summary

The Tool Matrix activity aims to build a shared understanding between developers and trainers around the ecosystem of tools used by a specific high-risk community and provides a framework for hosting a more in-depth conversation around usability and adoption challenges that can be documented and shared. This moves the conversation beyond the vague and unhelpful, “it’s hard to use” statements often heard by trainers and developers alike.

We recommend completing an activity like this at the beginning of an engagement, as it can enable digital security trainers to more effectively shape their digital security sessions, The Tool Matrix activity highlights areas of potential risk and provides an opportunity to identify where people are struggling to adopt better security practices and behaviors.

The results of the activity can be shared with a tool team so they better understand usage patterns and particular blockers to adoption, as well as increase their knowledge around the overall tool environment the community is operating in. The matrix results allow developers to see where their tool may have potential value for specific communities and how it compares with other privacy and security tools available.

Time Required

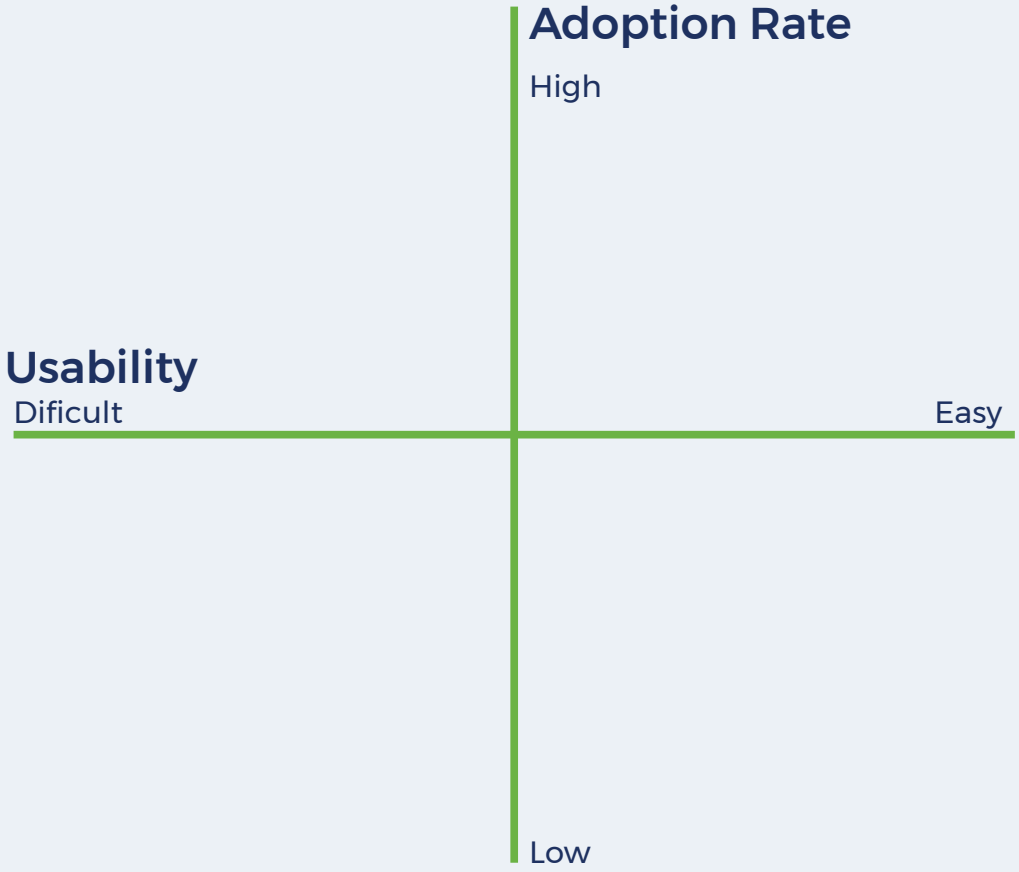
This activity runs between 45 and 60 minutes. The overall run time can be reduced to between 30 and 45 minutes by asking participants to share the various tools their community uses in a pre-event survey. This would allow the facilitator to create sticky notes with each tool in advance and focus solely on completing the matrix during the in-person activity.

Required Resources

- Sticky Notes
- Writing Utensils
- Tool Matrix
- A Whiteboard, Wall, or Other Flat Surface

Before the Activity

Prior to the activity, the facilitator should create the Tool Matrix. The matrix can be replicated on a wall using tape or a large whiteboard and consists of a simple grid. The horizontal axis measures usability, how easy or difficult the tool is to use for the specific community. The vertical axis measures the community-level adoption, or it's prevalence in the at-risk community. Please see the figure below as an example.



Facilitating the Activity

To begin this simple brainstorming exercise, the facilitator will ask participants to spend 3-5 minutes independently writing down tools they know their communities are currently using to do their work on individual sticky notes. These could be security tools, but they also could include other products that have security implications such as collaboration tools (e.g., Dropbox or Google Drive) or even social networking platforms (e.g., Facebook, Twitter, and LinkedIn). It is important to note, this is meant to be a sprint, writing one tool per sticky note. Participants should be encouraged to quickly write down as many tools as possible. The facilitator should be prepared to share several examples, as some participants may not know what to write. The examples can also be used to include tools that may be of specific interest to the facilitator.

The facilitator could also limit the tool matrix activity to focus exclusively on one group of tools, such as secure messaging tools, file encryption tools, browsers, VPN clients, collaboration platforms, social media, etc. This would provide more focus and would allow the participants and facilitator to compare similar tools to one another.

Once the group has completed their independent brainstorm, participants will be invited to collect their sticky notes and gather together in front of the Tool Matrix.

Discussion

The facilitator will then lead a larger discussion and plotting of the tools identified by participants by simply placing the sticky notes on the grid. The activity is meant to stimulate discussion rather than plotting hard and concrete points on the matrix. Tools may be moved around, but if there are differences in opinion the group must stop and discuss. The plotting is also intended to encourage more thoughtful conversation around what qualities make tools less user-friendly.

Review and Follow-up

Following the activity, the facilitator should document the tool matrix, either taking a photo of the matrix or collecting the sticky notes per quadrant, and review the results. The completed matrix gives the facilitator a strong understanding of the software and products the community uses and where users are having the most challenges with regards to usability and tool adoption. These findings may be used to inform future digital security trainings.

Additionally, the facilitator may wish to digitize the matrix and share with relevant tool teams to demonstrate how their tool may compare to other tools with regard to usability or frequency seen in the field.

Activity: Tool Task Usability Ranking (as a group)

Summary

Inspired by the larger Tool Matrix activity, this activity allows participants to plot how easy or difficult it was to complete a task in the training or walk-through. The goal of the exercise is to prioritize areas where tasks were more difficult and document specific issues mentioned by high-risk users. Facilitators can use this exercise to summarize “pain points”, or challenges, when using different tools and compare tools with similar tasks with one another.

Time Required

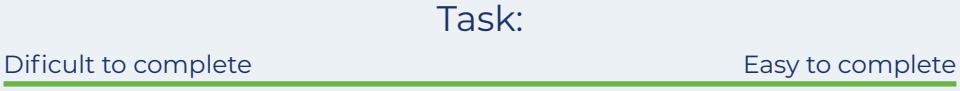
This activity runs between 45 and 60 minutes.

Required Resources

- Sticky Notes
- Writing Utensils
- Tool Matrix
- A Whiteboard, Wall, or Other Flat Surface

Before the Activity

Prior to the activity, the facilitator should create the axis. The axis can be replicated on a wall using tape or a large whiteboard and consists of a simple horizontal axis. The horizontal axis should measure how easy or difficult a task is to complete for a family of tools. The task should be outlined above and can be updated throughout the activity to reflect different phases of interacting with the tool or application. Please see the figure below for reference.



Tools should be categorized and ranked based on the following families of tools: secure messaging, file encryption, browsers, VPN clients, collaboration platforms, social media, etc. After selecting the family of tools, the facilitator will also need to establish set tasks relevant to each tool group. For example, if the activity will focus on secure messaging, tasks may include:

- Downloading or installing the tool or application
- Setting up the tool or application
- Sending an encrypted message
- Utilizing advanced features (such as disappearing messages)

When selecting this activity, the facilitator should be sure that participants are familiar with each of the tools being ranked. To effectively complete this activity, participants will need to be aware of each tool and familiar with each task within the tools.

Facilitating the Activity

To begin, the facilitator will ask participants to spend 3-5 minutes independently writing down tools within a family of products on individual sticky notes. Facilitators may also contribute to the list of tools.

Once the group has completed their independent brainstorm, everyone collects their sticky notes and gathers together in front of the axis.

Discussion

The facilitator will then lead a larger discussion and plotting of the tools identified by participants by simply placing the sticky notes on the task-specific axis. Tools may be moved around, but if there are differences in opinion the group must stop and discuss.

Review and Follow-up

The facilitator should document the axis for each task that the tools have been plotted, taking a photo of the axis. Following the activity, the facilitator should review the results. Each completed axis gives the facilitator a strong understanding of where users are having the most challenges within specific tools. These findings may be used to inform future digital security trainings.

Additionally, the facilitator may wish to digitize the axes and share with relevant tool teams to demonstrate how their tool may compare to other tools with regard to usability.

Activity: Tool-specific Task Usability Ranking (as a group)

Summary

A variation of the previous activity would be to write tasks on the sticky notes (an example of a sticky note might be “Install” and another “Configure”) which would be plotted on an axis per tool.

This activity allows participants to plot the usability of specific tasks within a specific tool. This would be beneficial if a training or event is focused on one specific tool. Facilitators can use this exercise to summarize pain points when using tools and compare the usability of tasks within a particular tool.

Time Required

This activity runs between 45 and 60 minutes.

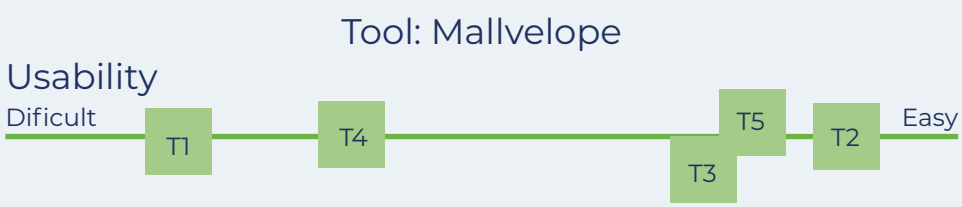
Required Resources

- Sticky Notes
- Writing Utensils
- Task Matrix
- A Whiteboard, Wall, or Other Flat Surface

Before the Activity

Prior to the activity, the facilitator should create the axis. The axis can be replicated on a wall using tape or a large whiteboard and consists of a simple horizontal axis. The horizontal axis should be labeled “difficult to complete” on the left side and “easy to complete” on the right side. Please see the figure below for reference.

Example of completed axis:



Facilitating the Activity

To begin, the facilitator should ask participants to spend 3-5 minutes independently writing down tasks within a specific tool on individual sticky notes. Facilitators may also contribute to the list of tasks. Examples of tasks include:

- Installing the tool or application
- Setting up the tool or application (generating a key pair, setting a master password, etc.)
- Practicing with the tool or application (sharing a key, sending an encrypted message, etc.)

Once the group has completed their independent brainstorm, everyone collects their sticky notes and gathers together in front of the axis.

Discussion

The facilitator will then lead a larger discussion and plotting of the tasks identified by participants by simply placing the sticky notes on the axis. Tasks may be moved around, but if there are differences in opinion the group must stop and discuss. The end result gives the facilitator a good understanding of the usability of tasks within a specific tool the community uses.

Review and Follow-up

The facilitator should document the axis, taking a photo of the axis or collecting the sticky notes in the order in which they were plotted. Following the activity, the facilitator should review the results. The axis gives the facilitator a strong understanding of the usability of tasks within a specific tool the community uses. This activity can highlight if users struggle with installation, set-up, or some other aspect of using the tool. These findings may be used to inform future digital security trainings.

Additionally, the facilitator may wish to digitize the axis and share it with the tool team to demonstrate areas of their tool that may be difficult for users.

In-Person Developer Engagement

Summary

This is an activity that will directly increase a developer's understanding of their users and help their ability to empathize with the specific challenges they face when using their tool. Digital security trainers, localization experts, and other facilitators can invite a developer (or another relevant member of a tool team) to observe or participate in a tool overview or training.

This activity does require additional **preparation and resources** (funds for developer to travel, etc.), but also removes the need for the facilitator to learn a complicated new system in order to effectively communicate user feedback to the developer virtually.

Time Required

This activity may be scaled to fit the context or situation. For example, a developer may be invited to attend a 1-3 hour tool feedback session (TFT) or a full-day or even multi-day training exploring various aspects of a tool (installation, setup, practice).

Required Resources

- Support (e.g., funding, travel, preparation) to bring developer to event
- Willing and available developer to bring on a tool relevant for the community's expressed needs

Before the Activity

It is often logistically complex to align community needs, interested developers, and everyone's availability, so try to allow for a few months to schedule and organize this activity.

With the Community: The facilitator will organize a tool overview or training and invite a community which has expressed interest and would derive value by learning the product. If the training will take place in another location, the trainer should provide a pre-travel briefing with some basics (local electricity, water safety, airport to hotel transit) as well as insights on visa/immigration, security (physical and digital) considerations, and a point of contact is strongly recommended.

With the Developer: The facilitator should also invite and coordinate with the developer on the proposed agenda and discuss what specific feedback will be most useful and relevant for the developer. Other things to consider when organizing an in-person developer engagement include:

- Set engagement expectations: Review the agenda and work with developers on when and how to engage, and specifically when to be in observation mode. It is both critical and challenging to keep an open mind and absorb criticism of your tool. See also the shared Code of Conduct note below on mutual respect.
- Prepare the developer for the local context. Let the developer know what sort of participants will be in the room, if there are any cultural considerations, travel or security considerations, etc. — a pre-travel briefing with some basics (local electricity, water safety, airport to hotel transit) as well as insights on visa/immigration, security (physical and digital) considerations, and a point of contact is strongly recommended.

Build shared expectations: Develop a code of conduct for the event (feel free to adapt USABLE's Creative Commons-licensed Code of Conduct) to ensure that everyone involved in the engagement agrees to be respectful and assume good intentions.

Facilitating the Activity

The facilitator should introduce and train the tool just as they typically would. The developer or tool team representative will observe the participants, noting areas where they struggle with the tool. This engagement allows developers to see firsthand the challenges users face and also humanizes the tool for users, as they meet the developer behind the tool.

During the course of the training, the developer will collect tool-specific feedback and gain a better understanding of users. Developers may want to provide a specific option for further follow-up and/or feature requests.

Discussion

Make time for private discussions after the training with the developer to help understand their takeaways and compare them to the results of a participant survey or similar feedback from the event.

Review and Follow-up

The facilitator should schedule time to debrief with the developer after the engagement. The facilitator should be available to help the developer synthesize and prioritize the feedback collected during the training.

Part III:
Collecting Feedback Outside of Trainings

This set of activities provides options for facilitators that do not have time during a training or event, but are still interested in documenting and sharing feedback with developers and tool teams. These activities can be facilitated outside of "traditional" trainings.

- Trainer Meetups
- Tool Feedback Session as a Standalone Event
- Virtual Feedback Collection

This set of activities provides options for facilitators that do not have time during a training or event, but are still interested in documenting and sharing feedback with developers and tool teams. These activities can be facilitated outside of "traditional" trainings.

Digital Security Trainer Meet-Ups

As mentioned previously, digital security trainers are uniquely aware of the needs and risks of the communities with which they work. It can also be difficult to find time during a traditional digital security training to incorporate a UX feedback collection activity. This activity is an alternative option that would allow trainers to collect and communicate feedback outside of a training.

A regular meeting of digital security trainers could be organized, gathering trainers that work with similar types of communities or simply trainers that are in the same location. At these meetings, trainers would discuss and document the specific needs of their end-users as well as the various challenges that they are facing. These meetings may result in the development of new user personas, or a collection of tool-specific feedback.

These gatherings will also provide space for the trainers to synthesize feedback, make concrete suggestions for tool improvements, and submit the feedback and suggestions to developers via the appropriate channel.

Tool-Feedback Session at International or Local Event

There are numerous regional and international events that bring together at-risk users that rely on open source privacy and security tools. Trainers and tool teams alike can take advantage of these gatherings by hosting tool-feedback sessions at these events. From the Internet Freedom Festival to RightsCon to ILGA World, these spaces provide a unique opportunity to convene users, designers, trainers, and open source tool teams.

Tool-feedback sessions may vary depending on the circumstances, but most large-scale events allow some form of formal or informal meetups. The activities outlined in this methodology may be adapted for this context to accompany a brief tool walkthrough with new users. Examples of activities that could be facilitated alongside a larger event include:

- Persona Generation
- User Stories
- User Observer Activity
- Tool Task Ranking Worksheet (as an individual)
- Mark-up a Screenshot
- Pluses vs. Deltas Activity

Templates such as the Tool Task Ranking worksheet can be used with both new and experienced users, and are therefore easy to use at larger events with diverse participants. The USABLE team piloted this activity at ILGA World 2019 and RightsCon 2019.

Collecting Feedback Virtually

Another option is to collect feedback virtually. This works particularly well when a trainer is engaging long-term with an organization or community. Following a training, the trainer should follow-up virtually to seek feedback on the tools covered during the training. This process can be repeated at regular intervals (one week later, one month later, three months later) to verify whether the organization or community is continuing to use the tool and identify whether new usability challenges have emerged over time.

A follow-up feedback survey template that can be shared with participants following a training can be found as Appendix J.

Additionally, some of the activities outlined in this guidebook could be facilitated remotely. For example, participants could be asked to complete the Mark-up a Screenshot activity or Tool Task Ranking template independently. The facilitator would still need to collect, compile and synthesize independent results before sharing with the developer, designer, or tool team.

Part IV:
Communicating with Developers and Tool Teams

This final section includes recommendations and guidance for digital security trainers and user experience experts who may be less familiar with communicating with tool teams. From communication channels to best practices, this section will provide facilitators with the basic skills needed to connect with tool teams and share relevant feedback.

Understanding the Open Source Ecosystem

Many of the most-used and most-critical open source digital security tools are maintained and updated by "tool teams" rather than businesses or organizations. These ad-hoc groups have little if any institutional capacity, are often under-resourced, and have limited insight into the specific needs of at-risk users. The survival of many of these tools is dependent on the dedication of volunteers, often working in their free time simply because they are passionate about the project.

Additionally, these small teams seldom include specific UX, user-research, or design experts. While USABLE has experienced great results with tool teams that have the capacity to devote towards addressing identified usability barriers, many tool teams simply lack the necessary personnel or organizational structures that would allow them to respond directly or even receive funding to support a response. This traps tool teams – and by extension, the community of high-risk tool users – in a vicious cycle of only being able to focus on the most immediate and urgent needs without being able to make long-term sustainability or scalability improvements.

Given these limitations, relevant and synthesized feedback from at-risk users via proper channels is incredibly valuable. As a trainer or facilitator, take the time to submit an issue or file a bug report. It could lead to meaningful usability and accessibility enhancements within the tools you and your community use.

Virtual "Ask Me Anything" Session with Developer

Many digital security trainers and at-risk end users have not met or communicated with a tool developer. Arranging a virtual call during which participants can ask developers a range of questions is a simple way to begin a relationship. This interaction will allow users to put a face to the project and understand who is working on the tool that they use in their daily lives.

Prior to the call, the facilitator and participants should familiarize themselves with the tool and draft a list of questions for the developer. Sample questions can be found below.

- **General Questions**

- How did you become involved with this project?
- What are your motivations for this work?
- How large is your team? Who else is working on the project?
- Who do you intend to use your tool?
- How is the project funded?
- What are the future plans for the project?

Feedback Related Questions

- How do you all currently receive feedback?
- Is there someone on the team focused on design?
- Do you currently use personas? If not, would personas be useful?
- How do you currently prioritize bug fixes? How much time is spent on this?
- What is the best way to share feedback?
- Do you prefer small or large requests on GitHub?
- What role do trainers play in the feedback loop? How do you view trainers?
- How has feedback previously been incorporated into development?

Ask the developer to provide a brief introduction at the beginning of the call. This three to five minute introduction will quickly address several of the questions and allow more time for tool-specific questions during the remainder of the call, It can also be useful to begin the call by explaining what type of users are in the room, how they use the tool, and what the goal of the call will be.

This call can be transformative for trainers and end users, as developers can affirm the usefulness of user feedback in the design process. End users that may have been skeptical of whether developers would be receptive to feedback will likely be much more receptive after the call. Similarly, this is an effective way for developers to meet and better understand at-risk users quickly.

Synthesizing and Prioritizing Feedback

Collecting feedback from at-risk users is a critical first step, but it is not the final step in this process. To maximize the impact of this feedback loop by ensuring that the feedback shared is of high quality, relevant, and consistent, trainers should spend time reviewing, synthesizing, and prioritizing which pieces of feedback should be shared with the developer. The questions below will help guide trainers and facilitators through this process.

What are the common areas of confusion or frustration?

It is important to focus on feedback that is common among multiple users. If multiple users are experiencing similar frustrations, this demonstrates that it is a shared challenge and not a one-off “user” error or misunderstanding. Understanding the scale of the issue will also help the developer prioritize the improvement

- **What are the common features or processes that users appreciate or are able to navigate easily?**

  While it is easy to focus on areas of a tool that users struggle with, it can also be helpful to highlight features or processes that users appreciate. This information will ensure that developers do not change or remove these features in the future.

- **How frequently does the user need to complete the frustrating or confusing task?**

  Consider the frequency of the task, as well as how important the task may be to the overall function of the tool. For example, if the user is struggling with a particular task within the tool, but it is not a task they will need to complete regularly (such as configuring settings), this may not be a priority for the developer. However, if it is a task that the user will need to complete on a regular basis that is causing frustration, this likely will be a priority for the developer.

  Alternatively, if a task does not need to be completed often, but is essential to the functioning of the tool, this can also be a major barrier that should be prioritized by the developer. For example, if a user struggles to install the program properly or setup the program to run, this may prevent them from properly using the tool, even though it may only need to be completed once,

- **Is this piece of feedback relevant and actionable?**

  The facilitator or trainer is also uniquely positioned to ensure that the feedback is relevant and useful. Not all users will have technical knowledge, which will influence the type of feedback that they are able to provide.

  For example, a user who does not understand how attackers could "spoof" a trusted contact even in a secure communication tool may not understand the importance of verifying contacts by comparing what is often presented as a very long code of letters and numbers, and therefore, never do it. While the specific complaint about the usability could be "this is too difficult / the code is too long;" a facilitator or trainer would be able to identify the root cause and help provide more actionable feedback to the developer. A request to "shorten" the code would likely be met with resistance from a cryptographic / security standpoint, but the trainer can suggest better ways to present critical information to the user (e.g., has the code changed?) and help identify more user-friendly but still cryptographically sound ways to present the information.

- **What concrete suggestions can I make based on the feedback collected?**

  Beyond simply highlighting areas of confusion or frustration, the facilitator or trainer is also a valuable voice when it comes to concrete suggestions for improvements. For example, if the language used on a specific button or configuration is confusing, suggest another word that may make the function of the button clearer to users. Similarly, instead of only highlighting that a specific word or phrase was not translated accurately, offer an alternative translation. These specific recommendations are very useful for the developer and give them concrete actions that they can take to improve the usability or accessibility of the tool or application.

- **How can I streamline the feedback process and maintain this feedback loop with the developer?**

  Most developers receive ad-hoc feedback from passionate users, who typically have some level of technical knowledge, but do not usually represent the average user of the tool or application. Trainers and facilitators are positioned to capture feedback from real users, prioritize it based on relevance and quality, and share it in a streamlined format. By formalizing this process, trainers and facilitators will be able to share feedback more regularly.

Tips for Communicating with Developers

Given that many non-technical people do not have experience communicating with developers, this list is designed to give quick tips for engaging. Note, it is not mandatory to follow each item step-by-step. The list is meant to give a quick and overarching view of tried and true methods when communicating with the open source developer community.

- Check to ensure someone is actively updating the project. If a project has not been worked on for several months, or even years, this should indicate the project is no longer active or the developers may be less receptive to feedback.
- Always be respectful and highlight features that you appreciate or value, as well as improvements that could be made.
- Establish a personal connection with the developer.
- Use a story or scenario to illustrate why your request/feedback is important. Explain how the design change will impact real end-users, or how the current feature has endangered end-users.
- Find the proper channel to communicate with the developer. This may be via email, GitHub issues, or some other channel.
- Some tools have guides on what specific feedback they are looking for and what format they prefer. Research and try to follow these recommendations.
- Document the steps you took that led to the issue. This is important for developers, as they will try to repeat the problem. Take screenshots or gifs of the problem. Write out a detailed description. Prepare a user story for the specific issue. Keep logs of how often the issue occurs or the number of people impacted.
- If you know how to use GitHub, see if your issue or concern has already been documented.
- Offer specific suggestions around how the tool could be improved.
- Advocate for more secure and user-friendly tools. Enlist other users to help make your case to the developer.
- Follow-up with the developer. This can be a quick thank you or a general check-in on progress.

Communication Channels

Each tool team has a preferred channel for communication. It is important to research these channels in advance to ensure that you are communicating with the developer or tool team in the most effective way possible. This section outlines some of the main channels tool teams prefer to receive feedback or connect directly with users.

- **In-App/In-Tool:** Some tools also offer avenues to provide in-app or in-tool feedback. There may be a chat feature, quick survey, or entire page dedicated to collecting user feedback within the tool.
- **Via the tool's website** - many tools have specific instructions or contact preferences that they list on their website. Do your best to follow these instructions when you can; but also keep in mind that many of these instructions or forms presume that you are reporting a specific "bug" in the tool about something going wrong, as opposed to suggestions to improve the usability or request a new feature, so they may not all be applicable or even possible to follow - and that is OK, but it is important to try to provide the data they request when they specify it or explain why you cannot. See the ***Bug Reports*** section for more information.
- **GitHub and other issue or ticket tracking systems:** Many tool teams store their code on GitHub (https://github.com). The platform can be used to identify which individuals are contributing to the code and to share feedback directly through the submission of "issues." Other tools use other platforms to help them track, prioritize, and discuss issues and feature development (Tor, for example, has a very active issue system at https://trac.torproject.org/projects/tor/query, and enigmail uses SourceForge for its system: https://sourceforge.net/p/enigmail/bugs/).
- **Email:** Tool teams typically have a general email account for the tool or project. Some also post the PGP key associated with the account so users can send encrypted emails. Individual developers may also post their personal email accounts.
- **Social Media:** Several tools have social media accounts, such as Twitter or Facebook, where they post updates and engage with users. Look on the tool's website or in their profile on GitHub, but be respectful of developers who keep their personal social media accounts separate from their tool development work.

GitHub for Non-developers

GitHub (https://github.com) is a powerful tool developers use for version control and storing their code in an open and transparent way. However, this platform is complex with many different features that can be daunting for the non-developer. This section will break down several features in a way that makes the most sense for non-developers, reviewing only what is needed to investigate a tool and to provide feedback.

There are three key ways that non-developers can use GitHub:

1. To check if a project is active
2. To investigate who is contributing to the code
3. To directly share feedback with developers

Before collecting feedback, it is essential that you make sure the project is still active and that someone is actively maintaining or updating the code. A quick search for a tool on GitHub can lead you to the project's repository. From there, the "Insights" tab provides additional information about the authors contributing to the code, the date of the last release or update, as well as any outstanding issues.

Developers that have previously worked or are currently working on the project are identified as "Contributors." The profiles of these developers can be found under the "Contributors" tab, which is under the larger "Insights" tab. Each profile captures the contributors work on the project over time, and any other projects or repositories that they work on. Additionally, some developers will include contact information on their profiles, such as their email address or Twitter handle.

GitHub can also be used by non-technical users to submit feedback directly to developers via issues. An issue is a term GitHub uses primarily as a "bug tracker", meaning if you encounter a problem with the software, you can submit an issue and the developers (who are in theory monitoring the issues in the queue) will address them according to their internal process and priority level. All issues are public, so this can also be a space to see what challenges or requests other users are submitting. More on GitHub issues can be found here: https://guides.github.com/features/issues

Bug Reports

In order to simplify and standardize the feedback process for digital security trainers, the USABLE team worked with developers to create a quick guide for submitting tool feedback.

The template included below outlines the key components that should be included when submitting tool feedback to a developer. It is important that a developer is able to recreate the issue or problem the user is facing. In order to do so, they will need basic information such as the operating system, version, and web browser (if applicable).

When providing feedback, it is also critical to explain exactly what you as the user expected to happen and how your expectations differed from what happened in reality. Attempts to report issues can be easily misunderstood, as the developer may not realize that users expect something different from a particular feature or process.

Other possible components to include when providing feedback are suggestions for improvements, logs, screenshots/GIFs, or error messages. This template can also be used to highlight positive features of a tool that users find useful. Sharing with a developer the parts of a tool that users appreciate can ensure that they remain unchanged in future versions.

Must Include	Try to Include
• Operating System • Version • Web Browser (if applicable)	• Suggestions • Logs • Screenshots • Error messages
• What was I doing? • What was I expecting? • What happened instead?	

GIFs as Feedback Method

When capturing feedback, a simple screenshot can fail to capture the process or path taken by the user. If a developer is able to review a recording the user's screen and see precisely the path taken to reach a specific point or error message, they will better be able to understand how the issue occurred or from where the confusion is stemming. There are various screen capture tools that can be used to capture feedback as a GIF. This is an additional way to catch a developer's attention and effectively share feedback on a tool, feature, or process.

LICEcap is one example of a tool that can be used to easily capture your screen and share user experience feedback. Similarly, PowerPoint can be used to create a "presentation" or series of slides with screenshots and markups that can be exported as a GIF or video. These GIFs can be easily shared with developers, via a range of communication channels.

For more information and tips on creating GIFs, check out these resources:

- How to GIF by Martin Shelton
- GIFs for Education Handout by Martin Shelton
- Teaching an educational GIF workshop by Soraya Okuda
- If you're not using GIFs to reach & teach your community, what are you doing? by Dina Ariss

Appendices

Human - **Centered Design** and User - **Experience**

Human-centered design[1] is a principle that intentionally places humans, their needs, their concerns, and their experiences front and center when building a system. This system could be a piece of software or a product, but it could also be a process like conducting a security assessment or creating a resource for your community. Components of human-centered design include:

- **Building empathy** with the users
- **Identifying needs** based on observations, interactions, and user feedback
- **Creative ideation** to solve challenges users experience
- **Prototyping** without technical implementation
- **Testing** to validate decisions made
- **Implementing** based on findings during the testing phase
- **Observing** and collecting more user feedback

User-experience, or UX, is a holistic way someone may experience the service, the product, or the system from all aspects - usability to information architecture and layout to things like likelihood of making a mistake or being able to recover from said mistake.
How are these two concepts related? If we are able to understand our users, better yet, we can even empathize with them using human-centered design principles, we are often left with better results. Our products, services, processes, or overarching system will be more resilient and more effective in achieving its goals.

A key feature to both human-centered design principles and good user-experience is communicating with the user in the form of feedback. In the software development world, it is important **to collect feedback early and often** to avoid problems later on in the development lifecycle, For example, spending hours engineering a product without inputting user feedback into the process can result in a product that no one will use. Not only is it likely to be difficult for your users, but changes will be more costly if made at the end of the cycle rather than the beginning, when very little to any code is written.

By involving trainers in the feedback process through the activities in this guide, USABLE provides a space for tool developers to learn about specific threats faced by their users, the risks they take, and challenges they face, in addition to tool-specific feedback to improve the design for high-risk users. Likewise, it gives trainers and high-risk users a platform to share their feedback and lived experiences, while impacting security and privacy products their communities need.

To learn more, we recommend checking out:

- Nielsen Norman Group
  https://www.nngroup.com/articles/design-thinking/
  https://www.nngroup.com/articles/definition-user-experience/
- Ideo
  http://www.designkit.org/human-centered-design
- Stanford University
  https://dschool.stanford.edu/resources/design-thinking-bootleg
- SimplySecure
  https://simplysecure.org/knowledge-base/

1. Don Norman on HCD Principles - https://www.youtube.com/watch?v=rmM0kRf8Dbk

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List of all **Activities**

Activity	Feedback	Time	Outputs/Impact
Pluses vs.Deltas	Tool-specific	15-30 mins	Collection of likes and dislikes of a specific tool to inform design and development changes or determine priorities
User Stories	User-focused	30-45 mins	*User Stories* help developers clearly identify specific needs of a community
Mark-up a Screenshot	Tool-specific	30-45 mins	Collection of tool-specific usability and accessibility recommendations
Tool Task Ranking (as an individual)	Tool-specific	30-45 mins	Participants rankings of various tasks related to a specific tool on a 1-5 scale, with 1 being easy and 5 being difficult
Mapping Digital Security Practices, Concerns, and Questions	User-focused	45-60 mins	Collection of user practices and concerns to help developers better threat model and design their products
User and Observer Activity	Tool-specific	45-60 mins	Collection of tool-specific feedback documenting the step-by-step process of installing, setting up, and using a privacy or security tool
Tool Matrix: Plotting Usability vs. Adoption	Tool-specific	45-60 mins	A tool matrix capturing the software and products the community uses and where users are having the most challenges with regards to usability and tool adoption
Tool Task Usability Ranking (as a group)	Tool-specific	45-60 mins	A summary of user pain points when using different tools, and comparison across tools concerning usability on a particular task
Tool-Specific Task Usability Ranking (as a group)	Tool-specific	45-60 mins	Identification of usability challenges for a specific tool, and a way to more quickly prioritize improvements based on the comparison of tasks
Persona Generation	User-focused	60-90 mins	Community-representational *User Personas* that can be shared with a variety of developers and designers

List of Tools

Note, if you are an open source security or privacy tool developer or are actively part of a development team, please contact us to add your tool to this list! Alternatively, if you are a trainer wishing to connect with an open source tool developer, you can also request an introduction. Please email connect@usable.tools.

Tool	Website	Channels for Feedback
Deflect	https://deflect.ca	https://equalit.ie/#contact
Enigmail	https://engimail.net	https://enigmail.net/index.php/en/support/reporting-defects
Jitsi Meet	https://jitsi.org/jitsi-meet	Github: https://github.com/jitsi/jitsi-meet/issues Jitsi Community Forum: https://community.jitsi.org
KeePassXC	https://keepassxc.org	Github: https://github.com/keepassxreboot/keepassxc/issues Freenode IRCt: https://webchat.freenode.net/#keepassxc-dev
Least Authority	https://leastauthority.com	Email: support@leastauthority.com GitHub: https://github.com/LeastAuthority/leastauthority.com/issues Twitter: @LeastAuthority
Mailvelope	https://mailvelope.com	Email: info@mailvelope.com (PGP key available on website) Github: https://github.com/mailvelope/mailvelope/issues Twitter: @mailvelope
Passbolt	https://www.passbolt.com	Github: https://github.com/passbolt Community Forum: https://community.passbolt.com
Psiphon	https://psiphon.ca/en/index.html	Email: info@psiphon.ca Facebook: https://www.facebook.com/Psiphon-207377692624236
SecureDrop	https://securedrop.org	Github: https://github.com/freedomofpress/securedrop/issues
TAILS	https://tails.boum.org	https://tails.boum.org/doc/first_steps/bug_reporting/index.en.html
Tella	https://www.hzontal.org/tella	Email: contact@tella-app.org https://www.hzontal.org/home
The Guardian Project (CameraV, Checkey, Courier, Círculo, Haven, LocationPrivacy, ObscuraCam, OpenArchive, Orbot, PixelKnot, ProofMode, Ripple)	https://guardianproject.info	Github: https://github.com/guardianproject Twitter: @guardianproject Freenode IRC: https://webchat.freenode.net/#guardianproject Toot: @guardianproject@librem.one
Tor Browser	https://torproject.org	Email: frontdesk@rt.torproject.org Trac: https://bugs.torproject.org Blog Post Comments: https://blog.torproject.org OFTC IRC: https://www.oftc.net (use #tor)
Umbrella	https://secfirst.org/umbrella	Email: info@securityfirst.org Github: https://github.com/securityfirst
VeraCrypt	https://www.veracrypt.fr/en/Home.html	Email: veracrypt-contact@lists.sourceforge..net Github: https://github.com/veracrypt/VeraCrypt
Zom	https://zom.im	Email: support@zom.im

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Template:
User Story

As a: _____,
[Role/Type of User]

I want or need: _____.
[Goal]

so that: _____.
[Reason/Motivation]

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Country
Persona Name

[Insert flag]

Persona Image

[QUOTE]

[PROFESSION OR IDENTITY]

Background

This section is to include background information about the community this persona represents. This can include information about their work, their personal life, how they operate.

Relevant recent events: List news articles or resources to recent relevant articles or events that have occurred within the specific community/country context.

Technology Use

This section is to list specific ways and tools the community uses for explicit security concerns, as well as everyday work. These all should have some impact or implications on their security.

Goals

LIST AN ACCURATE AND REPRESENTATIVE SET OF OVERARCHING GOALS THIS COMMUNITY IS TRYING TO ACCOMPLISH

- [GOAL]
- [GOAL]
- [GOAL]

CAPTURE THEMES -- #socialmedia #securecomms

Threats

LIST THREATS OR CLEARLY ARTICULATED CONCERNS BASED ON RECENT EVENTS, ADVERSARY CAPABILITIES, AND/OR EXPERIENCE.

- [THREAT 1]
- [THREAT 2]
- [THREAT 3]

CAPTURE THEMES -- #socialmedia #securecomms

Strengths

LIST STRENGTHS THEY HAVE TO DO THEIR WORK AND MITIGATE OTHER VULNERABILITIES. THIS COULD BE THINGS SUCH AS KNOWLEDGE, PRACTICE, RESOURCES, ETC.

- [STRENGTH]
- [STRENGTH]
- [STRENGTH]

Questions

- [QUESTION 1]
- [QUESTION 2]
- [QUESTION 3]

Internews

Role: User

Task	Dislikes	Likes
Text area	Text area	Text area

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Role: Observer

Task	Observation	Ideas
Text area	Text area	Text area

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Sample Tasks for Tool Task Ranking Worksheet

Orbot & Orfox

1. Install Orfox
   https://play.google.com/store/apps/details?id=info.guardianproject.orfox
2. Install Orbot
   https://play.google.com/store/apps/details?id=org.torproject.android&hl=en
3. Setup Orbot application
4. Open Orfox and verify you are using Tor
   a. Lookup the IP (iplocation.net)
5. Configure Orbot so that Chrome is running through Tor
   a. Verify Chrome is using Tor
   b. Lookup the IP (iplocation.net)
6. Select several other application(s) of your choice to run traffic through Tor
   a. Verify the application(s) are running through Tor
7. Start [application]

Advanced Users

8. Toggle between VPN mode and Tor

KeepassXC

1. Search and download KeepassXC
   a. Select the right version
   b. Download
2. Run the installer .exe or .msi
3. Search for KeePassXC in installed software
4. Start KeePassXC
5. Create a Database (explain the concept of the Database)
6. Save as *
a. Select the location where to save
b. Explain best practices to safely keep the file and master password
7. Explore the application (folders, entries)
8. Create an entry for Facebook or Gmail
   a. Fill the details : URL, login, password
   b. Validate, save

Advanced Users

9. Add a second entry for another platform
   a. Explore the random generated password
   b. Use it later on to change password when people are more comfortable with the tool

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Sample Tasks for Tool Task Ranking Worksheet

Tor Browser

1. Download software
2. Start Tor Browser
3. Setup Tor Browser Network Settings
4. Open Tor Browser
6. Verify Tor is working
7. Access Content

Signal (Advanced Users)

1. Create a group chat
2. Turn on disappearing messages for one day
3. Turn off disappearing messages
4. Turn off “preview” notifications when phone is locked
5. Require a pin code to open the Signal application

Mailvelope

1. Installation Process
2. Setup [Key Generation]
   a. Create a new public/private key pair
   b. Backup private key
   c. Upload public key to MIT key server
   d. Verify key is uploaded properly
3. Practice [Key Sharing]
   a. Share your public key with a friend
   b. Import a public key
   c. Send an encrypted email

Tool Task Ranking Worksheet Template

Product Name:

Operating System:

Browser Version (if applicable):

User Profile: profession/how they identify (for example: journalist, student activist, etc.)

Is this your first time using the product?

Task	Ranking (1 is easy to 5 is difficult)	Explanation / Suggestions
Installation Process	Text Area	Text Area
Setup and Configuration	Text Area	Text Area
Additional Task	Text Area	Text Area
Additional Task	Text Area	Text Area
Practice	Text Area	Text Area

Tool Task Ranking Worksheet
Mailvelope Example

Product Name: Mailvelope

Operating System:

Browser Version (if applicable):

User Profile:

Is this your first time using the product?

Task	Ranking (1 is easy to 5 is difficult)	Explanation / Suggestions
1. Installation Process	Text Area	Text Area
2. Setup [Key Generation]	Text Area	Text Area
2a. Create a new public/private key pair	Text Area	Text Area
2b. Backup private key	Text Area	Text Area
2c. Upload public key to MIT key server	Text Area	Text Area
2d. Verify key is uploaded properly	Text Area	Text Area
3. Practice [key sharing]	Text Area	Text Area
3a. Share your public key with a friend	Text Area	Text Area

Tool Task Ranking Worksheet
Signal Example

Product Name: Signal

Operating System:

Browser Version (if applicable):

User Profile:

Is this your first time using the product?

Task	Ranking (1 is easy to 5 is difficult)	Explanation / Suggestions
1. Create a group chat	Text Area	Text Area
2a. Turn on disappearing messages for *1 day*	Text Area	Text Area
2b. Turn off disappearing messages	Text Area	Text Area
3. Turn off "preview" notifications when phone is locked	Text Area	Text Area
4. Lock the application, even when you are using your device	Text Area	Text Area

Follow-up Feedback Survey Template

Purpose?

The purpose of this Follow-up Feedback Survey is to collect and **share valuable user-feedback about the products** being used by high-risk communities with those who are creating tools and technologies. The survey also allows facilitators or trainers to capture **environmental shifts in threats, risks, or other operational challenges** that users may be facing. The audience of this feedback could range from an open source product to a private sector platform or suite of tools.

When to use?

Best practice after training is to follow-up with the community to offer support and facilitate the adoption of better practices to keep users safe. This Follow-up Feedback Survey Template was created so that it can be incorporated and adapted into existing follow-up workflows and processes. Whether you are training a group for one hour or several days, follow-up allows you to understand barriers to adopting stronger practices or behaviors. Follow-up also benefits the broader training community with feedback that can be used to improve existing approaches to teaching information security.

How to use?

After your training engagement, review and adapt the survey according to your existing workflows, process, and time or funding constraints. Trainers should modify the survey to make it more appropriate for their local context.

Depending on your circumstances, long-term engagement may only be one month post training, but also could be six months or longer.The survey can be sent at multiple intervals following a training engagement to capture long-term adoption. If the opportunity arises where you can look at adoption of better practices for more than a month, think about what time intervals or touch points you may want to follow-up. It can be effective to send the survey after one month, three months, and then again at the five-month mark.

Follow-up Feedback Survey Template

Questions related to products learned during training (if applicable)

1. Are you still using [TOOL NAME]?
- Yes
- No

If no, why did you stop?
- Short answer.

2. Have you taught anyone from your community how to use the product since your training?
- Yes
- No

If yes, why?
- Short answer.

3. Have you identified any areas of the product where you or your community are having trouble using the product?
- Yes
- No

If yes, please explain with specific examples:
- Short answer.

Questions related to the changing operating environment

4. Have there been any significant changes in threats or risks within your community?
- Yes
- No

If yes, is it possible to share information safely?
- Yes
- No

If yes, please explain.
- Short answer.

Resources
- Measuring User Adoption by Tomer Sharon
- How are we evaluating our trainings? LevelUp.cc

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