

Contextual inquiry

Going remote with an in-person technique

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WHAT is contextual inquiry?



contextual inquiry

An ethnographic research method for understanding user behavior, needs, and expectations, accomplished by observing users as they complete tasks in their own environment.



FOCUS

Go in with a strong understanding of what you want to learn and why



CONTEXT

Embed with your user and watch them perform their daily tasks



PARTNERSHIP

Work with users to understand their behaviors - the what and the why



INTERPRETATION

Ensure shared meaning with users about the aspects of their activities that matter



WHY is it awesome?



why contextual inquiry?

Because what users do and what users SAY they do is very different.

Also, what users need and what users SAY they need is very different.

The only way to truly understand what a user does, needs, and expects is to observe them in their natural habitat, doing their natural things. This will help you create personas, articulate user journeys, and design meaningful solutions to user and business problems.



HOW do we do it?



the 3 main activities of contextual inquiry



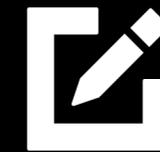
OBSERVE

Watch users to see what they are doing and how they are doing it. Identify how their context impacts their behavior.



ASK

Inquire about why users are doing what they are doing, what their thoughts are about the process, and how it could be improved



CAPTURE

Document, via notes, photos, videos, or audio, what the user is doing and saying.

But how do we do this when we are remote?

1. Break it up
2. Use technolog(ies)
3. Narrow your focus
4. Play with your tools
5. Self reflect



break it up

Instead of doing everything at the same time, spread out the activities over multiple sessions:

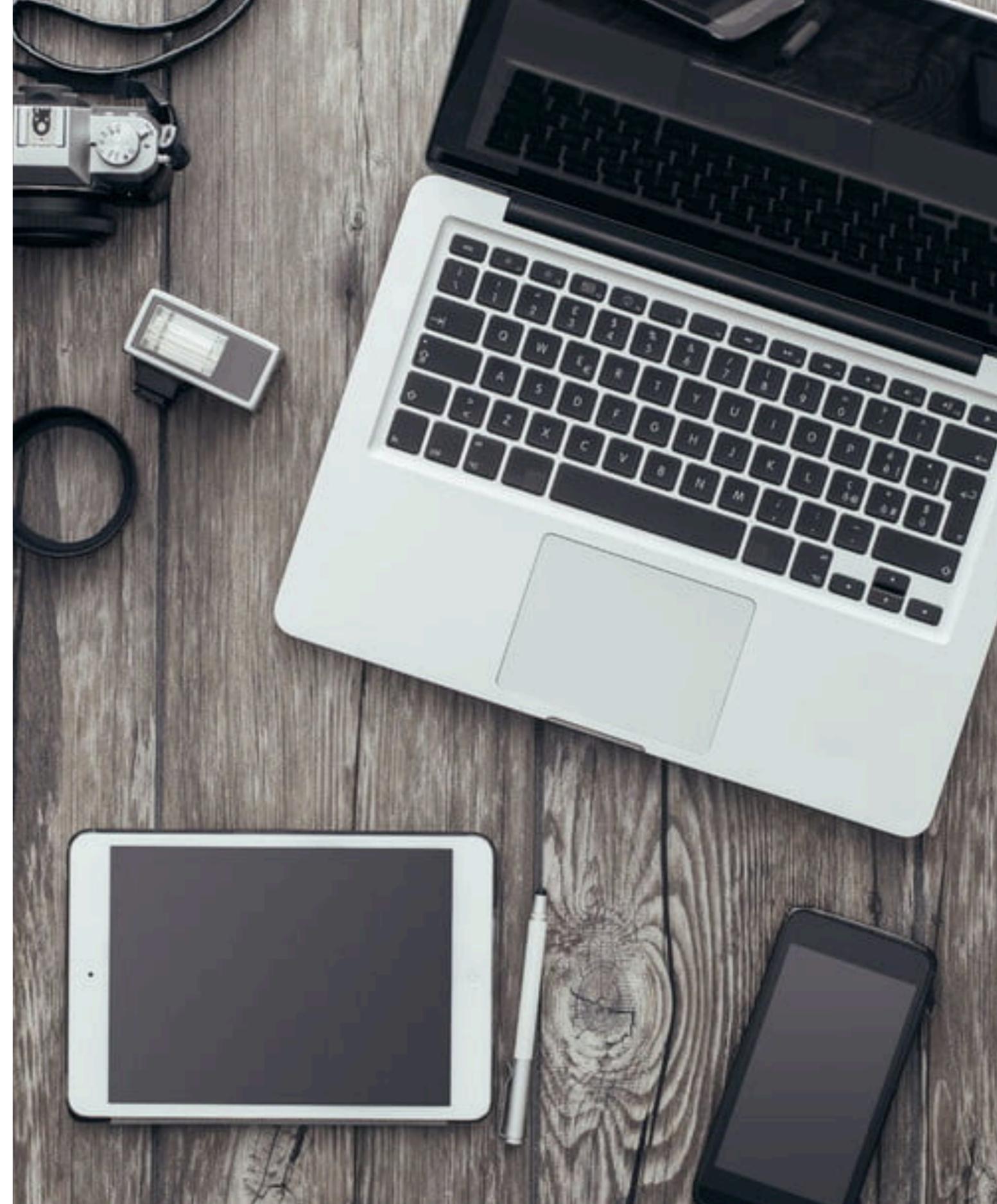
- **observe:** spend one session watching the participant complete a task
- **ask:** do a separate interview session either before or after the observation
- **document:** ask the participant to take photos or record themselves completing additional tasks

use technolog(ies)

This is the trickiest and most stressful part of any remote research. Technology can be temperamental. For remote contextual inquiry, you'll likely be using multiple devices and applications to get the level of context you need.

Plan out ahead of time exactly what you need and send the participant a checklist of things they will need to do ahead of time to get ready for the session.

Try to use tools that your participants already have or already know. This reduces the learning curve and makes them feel more at-ease during the study.

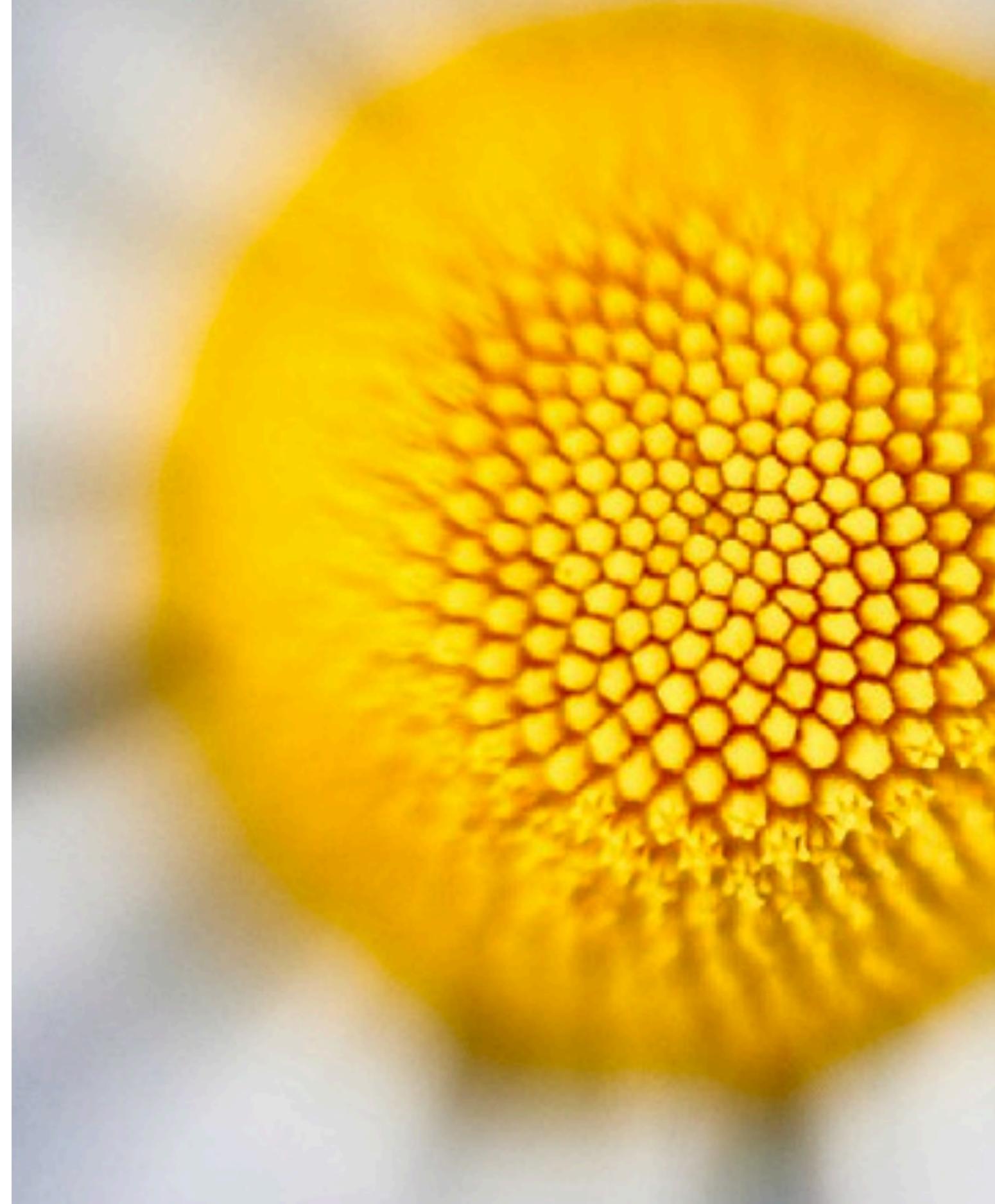


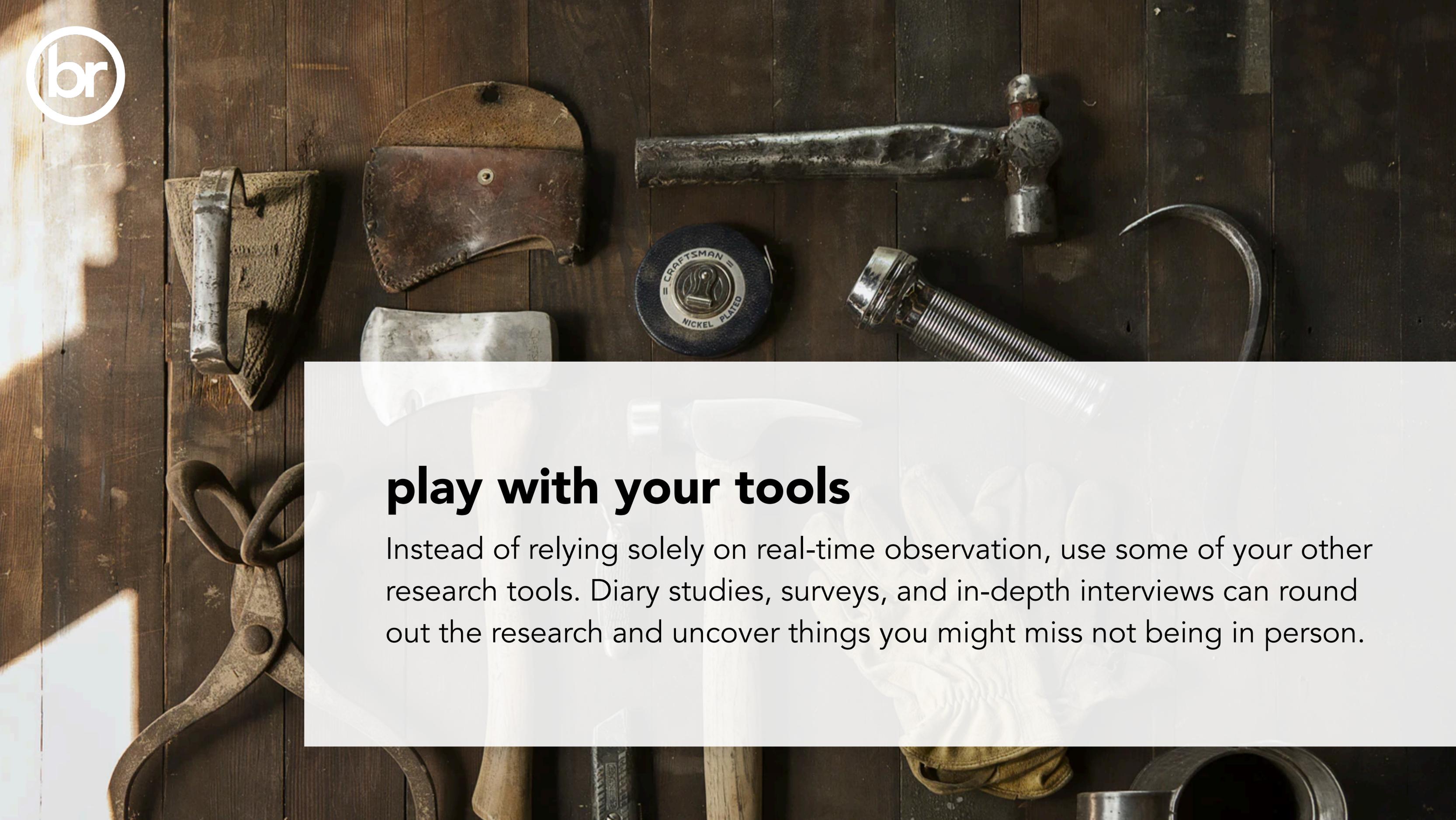
narrow your focus

Instead of observing multiple tasks at once, focus on a single flow per participant, per session. This gives you time to make sure the technology is working, helps you get the participant comfortable with the format, and lets you go deep.

If you try to research several tasks during a single remote session, you run the risk of the participant losing focus and skipping steps.

Plus, it's really hard to be observed in normal circumstances, but being observed virtually feels extra creepy.





play with your tools

Instead of relying solely on real-time observation, use some of your other research tools. Diary studies, surveys, and in-depth interviews can round out the research and uncover things you might miss not being in person.

self reflect

When you are doing remote contextual research, you are NOT embedded in the participants' physical context. You are in your own context. This presents its own unique set of challenges.

- Try to remove yourself from your everyday distractions
- Ground yourself in your physical space
- Be mindful of the world around you
- Document any biases, impressions, or reflections you may have
- Follow up as needed
- Be kind to yourself



q&a

