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studio.**

QUALITATIVE DESIGN RESEARCH

RECAP: WHAT IS DESIGN RESEARCH?

Design research is about learning from people in the context of their lives.

Find Problems

Understand a Topic

Build Empathy

FUNDAMENTALS

Design research is not the same as market research.

| Design research | Market research |
|----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Focuses on people. | Focuses on people. |
| Can be qualitative or quantitative. | Can be qualitative or quantitative. |
| Borrows from the social and behavioral sciences. | Borrows from the social and behavioral sciences. |
| Attempts to understand culture . Looks at the styles, words, tools, and workarounds people use, in an effort to inspire design. | Attempts to predict behavior . Looks at what people say they would do, or what they actually do, in an effort to predict what they would do in a new situation. |
| Celebrates the unique and peculiar. The rare or obscure in observations can lead to a new or interesting design idea. | Avoids the unique and peculiar. The goal is to understand mass responses; outliers are frequently ignored. |
| Avoiding bias is nearly irrelevant. The goal is not to be objective, but instead to be rigorous. | Avoiding bias is critical. The statistical analyses of data require an objective point of view. |
| Goal: Build Empathy | Goal: Build Understanding |

INTRODUCING CONTEXTUAL INQUIRY

A Contextual Inquiry is a behavioral interview in the context of an experience.

Unlike a typical interview, a contextual inquiry occurs in the physical (or virtual) context of where an experience occurs. This form of inquiry focuses on actual behavior as compared to hypothetical behavior.

The basic principles of a contextual inquiry are:

Go to the work

Rather than bringing the research participant into the studio or lab, go to them – observe their work or life in their workplace or home (in person) or digitally (via Zoom), so you are able to experience their natural environment.

Learn from the master

Establish a unique form of relationship with your participant: a master and apprentice interaction, where you act as the apprentice.

Observe real behavior

Unlike a typical interview of question and answer, provoke questions based on the actual behavior you observe in front of you, or have prompted by asking for artifacts and documents. Adapt the research based on observation.

INTRODUCING CONTEXTUAL INQUIRY



Go to the work

We are in the student's dorm room

Learn from the master

The student is teaching us about his organizational system

Observe real behavior

The student is planning how he will study and get his homework done for the week

INTRODUCING CONTEXTUAL INQUIRY



Go to the work

We are in a participant's garage

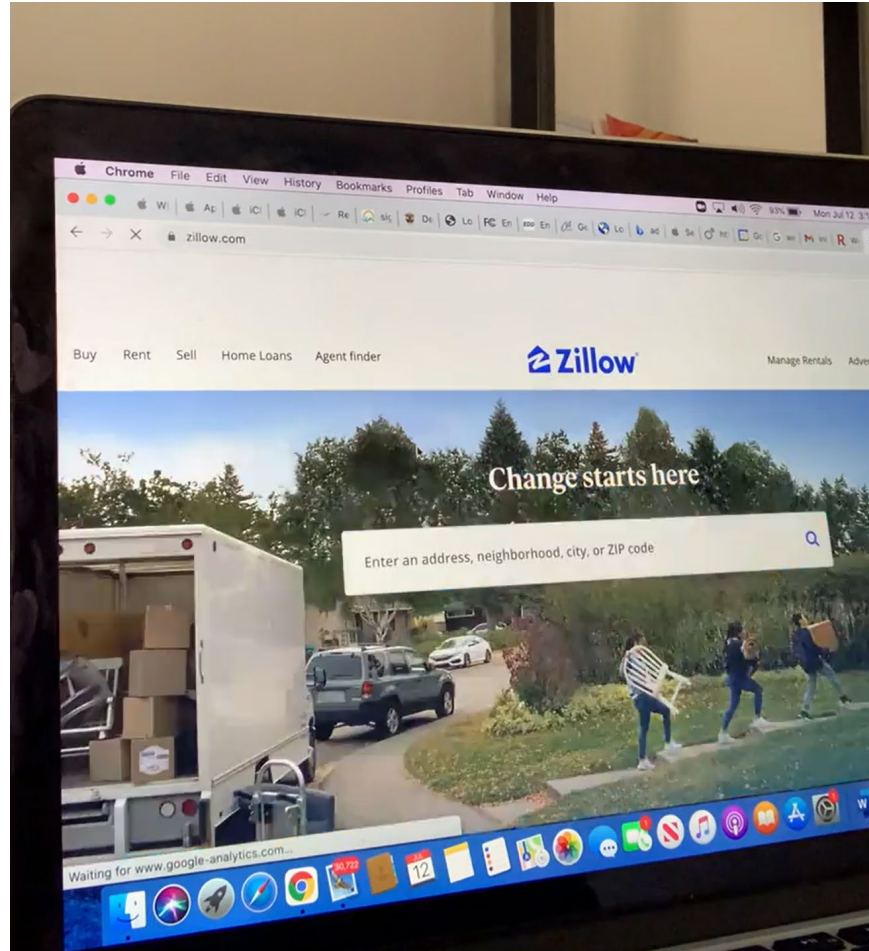
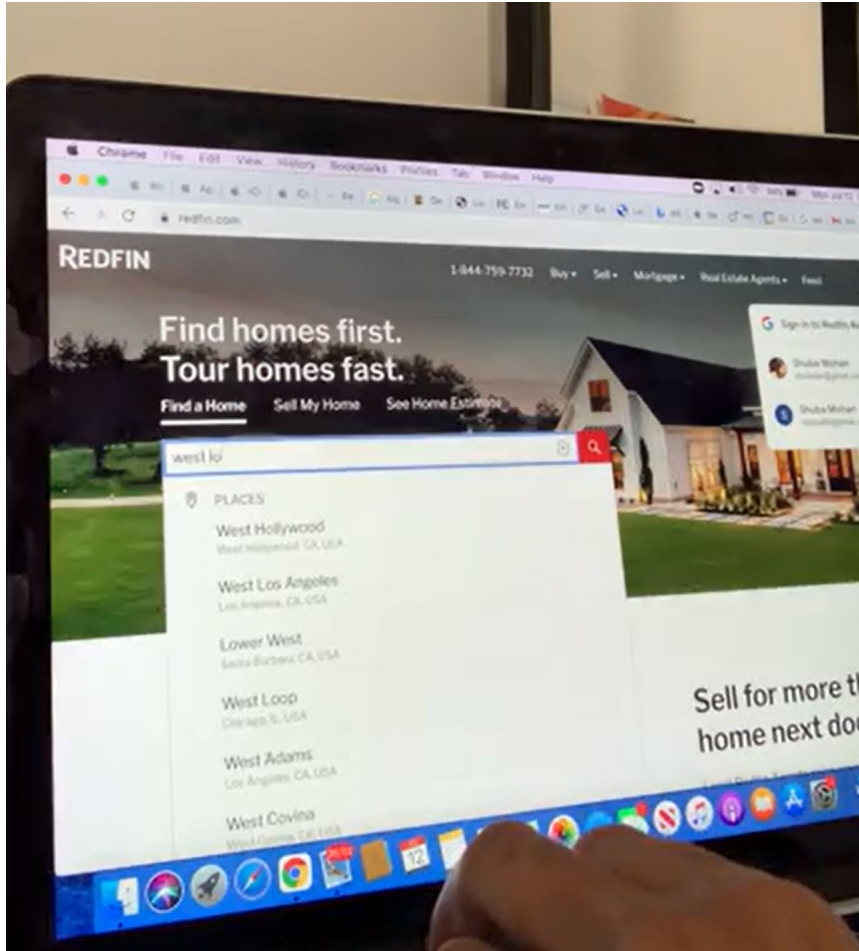
Learn from the master

The homeowner is teaching us about how recycling works

Observe real behavior

The participant stores items in bags because he doesn't know how to recycle them

INTRODUCING CONTEXTUAL INQUIRY



Go to the work

We are in the participant's house digitally, via Zoom

Learn from the master

The renter is showing us how she is hunting for a new home

Observe real behavior

The renter opens multiple sites that have the same inventory, thinking that she'll see different results

INTRODUCING CONTEXTUAL INQUIRY



Go to the work

We are in the baggage sorting facility under an international airport

Learn from the master

The floor manager is giving us a tour of the facility

Observe real behavior

The baggage handler is napping between flight arrivals

WHEN TO USE CONTEXTUAL INQUIRY

Contextual Inquiry helps you see opportunities for new products, services, and capabilities.

Contextual Inquiry can be used throughout the design process to fulfill a variety of goals; it acts as the “base method” for learning about people. It can be used to:

- Learn about a new topic or discipline
- Examine how an existing product is or isn't working
- Develop insights about how people work and live
- Help skeptical team members see the world through their users, customers, or colleagues eyes
- Identify room for new product and service innovations

HOW IT WORKS

Go to the work, establish rapport, and ask open-ended question about real behavior.

To conduct a contextual inquiry, focus on the following steps:

1. Establish a research focus
2. Identify the context of the experience
3. Locate and recruit participants
4. Arrive in context
5. Establish a rapport of partnership
6. Observe behavior
7. Ask open-ended questions

“Arrive” means many things – you can arrive in person, via a phone call, via Zoom in real time, or via a previous asynchronous recording.

SETTING A FOCUS

A good research focus narrows participant selection, but leaves room for exploration.




- Determine what space you will focus on
- Start broad, thinking about large concepts (buying groceries, paying bills, saving for college)
- Don't assume a problem
- Don't assume the boundaries of the focus area fall neatly along business or organizational boundaries
- Recognize that focus is a starting place, not an ending place

Your initial focus doesn't matter that much, because wicked problems are so tangled together.




SETTING A FOCUS

Define your research plan by identifying a focus statement.

 Example of poor focus statements:

-  We are researching problems with the current app.
-  We are studying what people want us to build.
-  We are researching people's finances.

 Example of better focus statements:

-  We are conducting research into people's relationship with money – specifically, how they feel about and manage debt.
-  We are conducting research into inner-city crime, hoping to feel what it's like to raise children in a neighborhood that may be thought of as “unsafe.”
-  We are conducting research with college students, hoping to feel what it's like to experience debt in the context of the community college academic journey.

IDENTIFYING CONTEXT

By observing experience in context, we can better watch real behavior.

“Being in context” means arriving at the place where the work is being done and watching it happen in real time or via asynchronous recording; pay attention to these things:

- Their physical work space
- Their work – tasks, sequences, intentions
- Their language
- Their tools
- Their organizational structures and culture

Be as specific as possible.

Consider that some contexts are dangerous, require permission, or are logistically too complicated to visit. What are next-best solutions?

IDENTIFYING CONTEXT

Identify the place you will go in order to observe real behavior and talk to real people.

For example:

We are conducting research with college students, hoping to feel what it's like to experience debt in the context of the community college academic journey.

We will visit students who live on campus at UDC Community College, in their dorm rooms. We will also ask them to facetime with us while they are in their class.

SELECTING PARTICIPANTS

Identify the people that you are going to spend time with and observe.

Identify the people who are closest to the circumstances you are exploring. What experiences will help you gain empathy, quickly?

This is not a demographic / segmentation exercise.

The people you are targeting have distinct behavioral patterns that make their perspective unique - Be as specific as possible.

The people you are targeting may not want to talk to you. Who would be a next-best proxy?

SELECTING PARTICIPANTS

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For example:

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We will visit students who live on campus at UDC Community College, in their dorm rooms. We will also ask them to facetime with us while they are in their class.

1. We hope to spend time with sophomores and juniors at local community colleges (individuals who are in the middle of their academic journey).
2. We will work with both declared and undeclared students.
3. We will work with students who have large amounts of college debt.

BUILDING A PLAN

Draft a research plan with enough detail that someone else could conduct your research.

Create a plan for your research, and recognize up front that this plan will go sideways very quickly. It's intended as a framing guide, not requirements for execution.

- Write a verbose introduction that explains who you are, what you are doing, and what you hope to achieve.
- Spend a lot of time considering how you will move from “question-answer” to watching behavior. Writing it as a script can help craft the transitions.
- Craft open-ended questions related to your focus, context, and participants.
- Write a research plan that describes what you will do, who you will do it with, where it will be done, and why you will do it.

ROLE PLAY

Role play the research experience to see where things will go sideways.

In your groups, pretend that one of you is the research participant, while the rest of you are the research team. Walk through the entire research plan.

MECHANICS & LOGISTICS

You can never be overly prepared – what can go wrong, will go wrong.

Organize your equipment:

- Video/audio recording (+ *Backup*)
- Camera
- Memory cards (+ *Backup*)
- Batteries (+ *Backup*)
- Pens/paper

Print your script:

- Your introduction
- Questions you can use to initiate behavior
- Consent form
- Any materials that will be used during the study

Ensure you have digital conferencing or recording software ready:

- Prepare a primary tool (such as Zoom) and test it prior to your session
- Have a backup tool (such as Google Meet) ready and open
- Have a backup plan for internet connectivity, such as tethering from your phone
- Ensure you have the participants phone number, so you can call or text them if digital technology fails you

INFORMED CONSENT

When working with participants, it's important to get informed consent.

Like a scientific study, we need to inform participants of the research protocol. This will protect both you and the participant, but more importantly, creates an ethical boundary around your research.

An informed consent form should:

- Explains any compensation that will occur
- Explains the scope of the study
- Explains how the results of the study will be used
- Explains exactly how the individuals name, image, company, and words will be used
- Explain that the participant can quit at any time



INFORMED CONSENT

[DATE]

[RESEARCH STUDY NAME]

I voluntarily agree to participate in this research study. I further grant my permission for the interview/inquiry to be recorded and transcribed, and for my photograph to be taken; I grant permission for these recordings and photographs to be used, but any identifiable information in regard to my name and/or company name will be removed from any material that is made available to those not directly involved the study.

I understand that during this research study, I will be asked to do some or all of the following:

- Describe my experiences in life and work
- Show artifacts and elements of my workplace
- Participate in drawing and writing exercises

I understand that there are no physical risks associated with participating in this study. I understand that I can quit this study at any time.

In exchange for my participation in this study, I understand that I will receive [COMPENSATION]. This will be the only compensation I will receive as part of the study.

Research Participant Name

Date

Granting permission to record and use information

Articulating tasks that will be performed

Risks, and the ability to quit at any time

Compensation that will be offered

ROLES AND RESPONSIBILITIES

Assign roles and responsibilities before the research begins.

Behavioral research works best with two people (a facilitator and a photographer). You can conduct research with three people (a facilitator, a photographer, and a note-taker), but more than three people is intimidating to the participant.

- The facilitator runs the session, and manages the recording device or digital tool.
- The other team member takes pictures and screenshots – as many as possible.

ROLES AND RESPONSIBILITIES – FACILITATOR

The facilitator acts to establish and maintain rapport with the participant.

As the facilitator, it is your responsibility to establish and maintain a master/apprentice relationship, where the participant trusts you and knows you are there to learn from them.

- Make eye contact, but purposefully defer or adjust your gaze regularly to set the participant at ease (don't stare)
- Be conversational, but not chatty.
- Ask 1 question at a time.
- Be patient; count to 3.

ROLES AND RESPONSIBILITIES – FACILITATOR

The facilitator asks questions; asking good questions is an art and science.

| ✓ Good questions to ask | Why? |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------|
| Can you tell me about [x]? | The participant is left to interpret the topic in their own way, showing how they think about a particular subject |
| Why? | The participant has introspection, offering a deeper consideration of the topic |
| Can you tell me more? | The participant builds on what they've already said, adding more detail and refinement |
| Can you show me? | The participant leverages artifacts or processes, describing real behavior instead of hypothetical behavior |
| Can you tell me an example? | The participant grounds their comments in reality, rather than conjecture |
| Can I try? | The participant shifts to the role of teacher |

ROLES AND RESPONSIBILITIES – FACILITATOR

The facilitator asks questions; asking good questions is an art and science.

| ✘ Bad questions to ask | Why? |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Do you always do it like that? | The participant will rely on memory, which is often wrong or over simplified |
| Do you like it? | The participant is offering conjecture, which may not actually reflect their true feelings and opinions |
| You like it, don't you? | The facilitator is leading the participant in a particular direction, and the participant may feel compelled to agree with the facilitator |
| Can you estimate how often you... | Participants are very bad at estimating durations, quantities, and other quantities |
| If [x] existed, would you buy it? | Hypothetical purchasing behavior rarely matches actual behavior; and, contextual research is not the place to conduct market research! |

ROLES AND RESPONSIBILITIES – FACILITATOR

A “master/apprentice” relationship positions the participant as a teacher.

A master/apprentice relationship: you are the apprentice, and you have a humble mindset.

- Let the user lead the conversation
- Assume you don't know
- Downplay your teams presence in person (2 people is ideal, 3 at max)
- Downplay your teams presence digitally (2 people in Zoom max, 1 with camera off)
- Downplay recording technology, like cameras

ROLES AND RESPONSIBILITIES – PHOTOGRAPHER

The photographer visually captures the stories you hear and see in the field.

Visually document everything.

- Know your equipment.
- Makes sure everything is prepared ahead of time (batteries charged, settings, free space, etc).
- Shoot from the hip; get out of their face. Don't use a giant SLR camera and a large lens; smartphone cameras are just fine.
- Turn camera noises off.
- Take several face images, with permission.
- Over-shoot. Shoot everything you can.
- Shoot as many context images as you can.
- Shoot landscape.
- Back-up every day.

DEBRIEFING AND INITIAL ANALYSIS

Immediately after the inquiry is over, regroup to discuss what you heard and saw.

When the session is still fresh in your mind, discuss as a group, and capture in writing:

- The three most important themes
- The three most surprising facts or comments
- The most important story or anecdote

APPLICABILITY

Why are we doing this?

Design research helps us establish empathy with people. This empathy can then be leveraged during design to create new products and services that have appeal – that people find useable, useful, and desirable.

Design research also builds understanding, so that we can make more informed design decisions.

APPLICABILITY

Contextual Inquiry acts as a foundation for tackling a complex design problem.

Find Problems

As you work in context, you'll identify workflow problems, issues with system designs, interaction and usability problems, and other "low hanging fruit" that can be addressed through new product and service development.

Understand a Topic

You'll gain expertise acting as an apprentice to a master, and that means you'll gain a deep understanding of the nuances of a given job or experience.

Build Empathy

As you spend time with a master and observe them, you'll start to see the world through their eyes. You'll be able to imagine how new design changes will feel, and act as an advocate for the people you are trying to help.

- thanks!

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