

For people in design teams who need to base their designs on reality, not on assumptions, *“Contextual inquiry: how to plan, execute and analyze a site visit”* is a 1-day seminar that teaches delegates how to get the most from a field visit to a customer location. Unlike academic courses, delegates on this seminar carry out their own study and so learn the practicalities of contextual inquiry on the job.

Duration

This is a one-day workshop.

Overview

Field studies are invaluable when you need to understand first-hand how users work or behave, the kinds of tasks users carry out and the variety of environments in which users operate. Real-world observation provides insights that user self reports or surveys can't provide - often because users can't explain what they are doing or because their behavior is so practised that users can't articulate how they work.

But carrying out a field study has a number of difficulties. How do you select the right users? When should you observe and when should you ask questions? How do you collect observational data and how do you analyze it to improve your design?

Who is the course for?

This course is for you if you are part of a design team that wants to develop a new product or that wants to identify new features for an existing product. This is a hands-on course and is most effective for delegates who have day-to-day responsibility for product design.

How will I benefit?

After attending this course, you will be able to:

- Collect rich, detailed data that will help you gain a holistic view of users and their tasks.
- Learn how to project a professional image to clients and customers.
- Target the right kind of users for potential site visits.
- Develop field study forms and checklists to quickly and accurately record observations.
- Practise techniques like KJ Analysis to quickly analyze observational data.

What will I learn?

Introduction – Why carry out a site visit?

- Where field research fits in the user centred design process
- Observing and interviewing users in context: Why field research is important
- Field study methods to choose from
- Discussion: Agree the focus for the syndicate activity

Planning the site visit

- Determining the appropriate participant mix
- Developing surveys and screeners
- Scheduling participants and planning the day
- The ten focal points of an observation
- Developing field study forms and checklists to structure the observation
- Roles and responsibilities: investigator, note-taker and photographer
- Syndicate activity: Develop materials for the syndicate activity

Executing the site visit

- Establishing rapport with the participant
- How to avoid bias in your observations
- Conducting the inquiry: The Discount User Observation (DUO) method
- The four kinds of information to collect
- Syndicate activity: Carry out the site visit

Analysing the data

- KJ Analysis: Getting started
- Fun with sticky notes: Brainstorming, posting, grouping, labelling and ranking observations
- Analyzing key tasks
- Syndicate activity: Analyze the data from the site visit

Presenting the results

- Personas and scenarios
- Fishbone timeline diagrams
- Syndicate activity: Groups report back on the data collected

What is the workshop format?

A fast-moving, interactive, but structured training session with a focus on active participation: about half the time will be spent in discussion and on exercises. Activities and case studies will enable you to apply the concepts to check your understanding. You will be encouraged to ask questions and to contribute to the seminar.

Who is the workshop leader?

Philip Hodgson is the Managing Director of Blueprint Usability, an independent consultancy specializing in usability training and consultancy. He has over twenty years of experience as a researcher, consultant, and trainer in usability, user experience, human factors and experimental psychology. His work in usable design has influenced products in the consumer, telecoms, manufacturing, packaging, public safety, web, and medical domains for the US, European, and Asian markets.

Philip is a contributor to the ISO product usability standard (ISO 20282: Ease of operation of everyday products), and a member of the NIST/ANSI working group for a common industry format (CIF) for usability reporting. Philip previously worked as an internal usability and human factors consultant with Nortel, Motorola, and Whirlpool. He holds a BSc (Hons) degree, an MA and a PhD in Experimental Psychology and is a member of the Usability Professionals' Association, the Industrial Design Society of America, and the Association for Psychological Science.

How do I book?

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