

IS 214 Needs Assessment and Evaluation of Information Systems

Contextual Inquiry

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Contextual Inquiry

- As defined in the Contextual Design process of Karen Holtzblatt and Hugh Beyer of InContext Enterprises
- Scope is product definition, not just user interface usability

Contextual Inquiry - Principles

- Context – understand customers in the context of their work
- Partnership – work with customers as partners in inquiry
- Interpretation – uncover the meaning and implications of customer action and language
- Focus – listen and probe from a clear intention

Context

- Observe users while they are working, doing what they normally do when you aren't there
- Don't let them summarize, tell you what 'we' or 'they' do 'most of the time' or 'usually'
- Don't let them abstract, grouping work together in pre-defined categories
- Don't ask "what would you do" or "how often", "show me what you do", observe how often

Partnership

- You are the apprentice with the master user
 - Master shows how it is done
 - Apprentice observes and interrupts for clarification
 - Apprentice is humble, does not criticize or correct
- It is hard for experts to explain what they do
- You help users see their work practice
- Avoid being questioner, teacher, or guest

Interpretation

- Your interpretation is the most valuable data
- You and the user build a shared understanding
- You must test your interpretations in the context of the user's work, ask the expert
- Test your design ideas, ask the expert
- Don't use neutral, open-ended questions

Focus

- Your project focus and objectives
- Your assumptions about users and tasks
- Your limited perspective, biases
- Don't dismiss surprises, each user is many
- When you see something that validates your assumptions, check it with the user

Performing Contextual Inquiry

- Picking the project
- Recruiting participants
- Setting up the interview
- Conducting the interview
- What to record

Picking the Project

- Significant, customers want it, management supports it, and high visibility
- Organization is open to new ideas, process
- Clear focus with minimal dependencies on other groups
- Big user interface, not a programming interface
- Easy to identify and contact customers

Recruiting Participants

- 15-20 users, but any better than none
- 5 customer sites, 3-4 users at each
- Direct mail or web site to solicit participants
- List of existing customers, through sales force
- Beta test sites, competitor's customers
- Keep a list of users from all of the above

Setting up the Interview

- Provide a description of what you will do
- Ask them to save tasks for while you are there
- Ask them to save artifacts to discuss
- Tell them not to clean their desks
- Tell them they will get work done
- Set expectations, not all suggestions get in
- Assure confidentiality, bosses don't get data

Conducting the Interview

- Introduction, get overview of their work
- Deal with opinions about tools, write down
- Reset rules to "you do work, I'll watch"
- Observe and take notes
- Be nosy, interrupt for interpretation
- Wrap-up, your major interpretations, ask "pet" questions, give tips on system use

What to Record

- 15-20 pages hand written notes for 2 hours
- User words, actions step-by-step
- Coordination with others
- Shared interpretation of the meaning and intent
- Indications of culture and feelings of user
- Collect artifacts and annotate with usage
- Draw the user's physical environment

What's Important

- Observe the user in context of work
- Record the details of the work
- Share your interpretations

Contextual Inquiry Assignment

- You are working for an online grocery service
- Perform contextual inquiry with someone doing their grocery shopping
- Record their planning process, if any, who they work with, what they do in the grocery store
- Sketch the home and grocery store environs
- Obtain any artifacts like lists and receipts