

Contextual Inquiry

NUMBER OF PARTICIPANTS	FACILITATORS	CATEGORY	DURATION	LEVEL OF DIFFICULTY
3 Per Group (Interviewer, Notetaker, Interviewee)	1	Empathize & Define Phase	80min	Moderate

Description

The Contextual Inquiry is an interview that appears in the context of use. This means that the interview takes place where the interactive system under investigation (e.g. a product, software, etc.) interacts with the interviewee. For example: In a factory, in an office, or on a farm. The Contextual Inquiry is a semi-structured interview. Like the structured interview, you have an Interview Flow with questions that you have prepared, but you can also ask spontaneous questions to gain deeper knowledge, as in the non-structured interview. Contextual Inquiry is a qualitative method. This means that it is good if you already have some knowledge and want to deepen it or to explore a new research field. Since the user is interviewed in his/her work environment, the answers given in the interview additionally provide contextual information (e.g. workplace, temperature etc.), compared to an interview in a laboratory. The Contextual Inquiry is a method that requires a lot of preparation and a long subsequent analysis and can therefore often only be carried out in small numbers. For further information, please read the PowerPoint presentation.

Goal of the workshop

The aim of the workshop is to give the participants a deep insight into the method Contextual Inquiry. Afterwards, the participants should be able to carry out the method and explain the functionalities to co-workers:

- ▶ What the Contextual Inquiry is about
- ▶ When to use it
- ▶ How it is conducted

The workshop PowerPoint presentation serves as an introduction to the Contextual Inquiry method. The slides are self-explanatory, so that everyone can read and understand them. The workshop exercise will not focus on the whole process of conducting a Contextual Inquiry. The exercise focuses on the most important aspects of the method: Creating an Interview Flow, formulating questions and conducting a Contextual Inquiry.

Materials

- ▶ For the moderator of the workshop:
 - ▶ Computer and projector
 - ▶ The PowerPoint presentation
 - ▶ Timer (to control the duration of the workshop exercise and presentation)
 - ▶ A room large enough to build tables for small groups
- ▶ For the participants of the workshop (per group):
 - ▶ Two workshop documents "Contextual Inquiry — Interview Flow" and "Contextual Inquiry — Cheat Sheet" (printed and/or digital — e. g. tablet, computer)
 - ▶ A pen (If you prefer to print the documents to take notes)
 - ▶ A smartphone to create an audio recording
 - ▶ A computer with a stable internet connection for the interviewee, to visit the website for the workshop exercise

Preparation

- ▶ Read the presentation slides before the workshop and get to know the method.
- ▶ Provide general information about the location, time and date of the workshop in a reasonable time for the participants.
- ▶ Contact all participants in a reasonable time to bring the materials or the workshop moderator must provide the materials. Always bring more workshop materials than necessary in case something breaks.
- ▶ Ensure that a suitable room is available for the workshop.
 - ▶ Look at the room for the workshop, are there enough tables and chairs, do you have the technical equipment to show your presentation?
 - ▶ Test your PowerPoint presentation in the room.
 - ▶ The room should be prepared for group work. It is best to set up group tables and equip them with the workshop materials.
- ▶ Before the presentation, the moderator should consider how she/he would like to put the groups
- ▶ together. If the participants already know each other, it may be advisable to form random groups and distribute name cards. This can increase the diversity of the individual groups.

- ▶ Test the materials before the workshop starts, if you have provided them yourself. If the participants have brought their own material, test it with them together:
 - ▶ Can you access the website with a computer?
 - ▶ Do you have an audio recording app on your smartphone?
 - ▶ Do you have pens for writing and taking notes?
 - ▶ Are the two workshop documents available to everyone?

Step-by-Step Instructions

1. Start the workshop with a small introduction session where the moderator and the participants can introduce themselves.
2. The moderator should then present the schedule of the following workshop to the participants so that they know what to expect. It is advisable to present the agenda visibly during the workshop, so that participants can follow the programme. In addition, the agenda also provides a brief summary of the workshop.
3. Start with the presentation of the method using the PowerPoint slides.
4. Open questions from the participants should be answered now, so that everyone understands the method.
5. Introduce the workshop exercise.
6. Explain to the participants the two documents of the workshop exercise "Contextual Inquiry – Interview Flow" and "Contextual Inquiry – Cheat Sheet" (printed and/or digital)
 1. Contextual Inquiry – Interview Flow: This document contains a description of the task and space for notes.
 2. Contextual Inquiry – Cheat Sheet: This document contains information from the presentation to help participants to apply all the rules and advices in the exercise.
7. The moderator should clarify all open questions regarding the exercise.
8. Set a timer for 30 minutes and let the groups start with the exercise.
 1. Remind the groups every 10 minutes to finish one part of the exercise and to start with the next part.
 2. If necessary, provide hints and help while the groups do the exercise.
9. Finish the exercise after 30 minutes. It is useful not to break off exactly after 30 minutes, but to give the participants 1 or 2 minutes to complete the work, if necessary.
10. Moderate a discussion on the results of the exercise and how the participants experienced the method. Each group has the opportunity to present their results and their experiences with the method. Having a discussion can be difficult for non-

routine workshop participants, it is helpful to prepare specific questions in advance that can initiate a discussion. These could be, for example:

1. How did you feel about the method?
2. When could you imagine using this method?
3. What were the biggest challenges?
4. What surprised you?

11. End the workshop by offering to answer some last additional questions and asking for feedback to improve the workshop for the next time (slide 28). To get feedback, it is possible to have a discussion or to distribute a survey. The feedback discussion carries the risk that the participants do not dare or do not want to speak in front of the group. Anonymous variants have the advantage that everyone can express themselves, but on the other hand, the moderator cannot ask questions if anything is unclear. The workshop moderator must decide which method promises the most advantages for him/her.

Remarks, Tips, Limitations

Limitations

- ▶ Participants don't need to create a User Profile due to time constraints, and the focus of the exercise is on creating an Interview Flow and conducting the Contextual Inquiry.
- ▶ Participants don't need to transcribe the audio recordings they made while conducting the interview — this would take too long.
- ▶ This workshop cannot be conducted online as the key function of the method requires context information that can only be provided by the physical presence in the user's environment.

Tips

- ▶ Ask participants for feedback after each workshop in order to improve the workshops in the future (e.g. survey, feedback discussion)
- ▶ If you conduct the workshop for the first time, try to test it with volunteers before conducting it seriously with participants.
- ▶ You should always plan a time buffer for the workshop. This way you don't have to stop the workshop if the schedule is delayed. Especially the discussion at the end can quickly take up more time than planned. However, the exchange is very supportive for all participants and should therefore be brought to a satisfactory conclusion.

Strengths: Receive deep knowledge about the interviewee and important information about the context. Often unconscious things can be discovered.

Weaknesses: The method is time consuming and expensive, only worth for small sample. Comparison of results is not recommended.

References

References that are used to create the workshop materials (at the end of the PowerPoint you also find reference slides that show more precisely which slide uses which reference).

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