Format of the sense making session 11/12/19
We will have screenshots of pages, insights and some printed notes
Following the mygov.scot recommendations:
- Introductions: what we want to get from this session (5min)
- Data review: look at the insights, add post it when things are missing (20min)
- Data theming: in groups, record all opinions, rearrange the post it notes to identify themes and record them (45min)
- Next steps: agree next steps (20min)

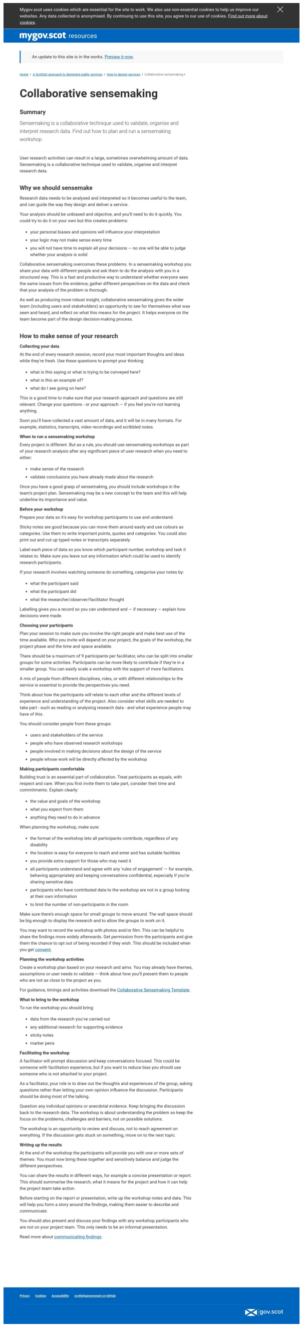
feedback links on service page were not tested

issue is not SEP specific

High priority

Medium or not prioritised

David O notes



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mygov.scot resources

An update to this site is in the works. Preview it now.

Home › A Scottish approach to designing public services › How to design services › Collaborative sensemaking ›

Collaborative sensemaking

Summary

Sensemaking is a collaborative technique used to validate, organise and interpret research data. Find out how to plan and run a sensemaking workshop.

User research activities can result in a large, sometimes overwhelming amount of data. Sensemaking is a collaborative technique used to validate, organise and interpret research data.

Why we should sensemake

Research data needs to be analysed and interpreted so it becomes useful to the team, and can guide the way they design and deliver a service.

Your analysis should be unbiased and objective, and you'll need to do it quickly. You could try to do it on your own but this creates problems:

- your personal biases and opinions will influence your interpretation
- your logic may not make sense every time
- you will not have time to explain all your decisions — no one will be able to judge whether your analysis is solid

Collaborative sensemaking overcomes these problems. In a sensemaking workshop you share your data with different people and ask them to do the analysis with you in a structured way. This is a fast and productive way to understand whether everyone sees the same issues from the evidence, gather different perspectives on the data and check that your analysis of the problem is thorough.

As well as producing more robust insight, collaborative sensemaking gives the wider team (including users and stakeholders) an opportunity to see for themselves what was seen and heard, and reflect on what this means for the project. It helps everyone on the team become part of the design decision-making process.

How to make sense of your research

Collecting your data

At the end of every research session, record your most important thoughts and ideas while they're fresh. Use these questions to prompt your thinking:

- what is this saying or what is trying to be conveyed here?
- what is this an example of?
- what do I see going on here?

This is a good time to make sure that your research approach and questions are still relevant. Change your questions - or your approach — if you feel you're not learning anything.

Soon you'll have collected a vast amount of data, and it will be in many formats. For example, statistics, transcripts, video recordings and scribbled notes.

When to run a sensemaking workshop

Every project is different. But as a rule, you should use sensemaking workshops as part of your research analysis after any significant piece of user research when you need to either:

- make sense of the research
- validate conclusions you have already made about the research

Once you have a good grasp of sensemaking, you should include workshops in the team's project plan. Sensemaking may be a new concept to the team and this will help underline its importance and value.

Before your workshop

Prepare your data so it's easy for workshop participants to use and understand.

Sticky notes are good because you can move them around easily and use colours as categories. Use them to write important points, quotes and categories. You could also print out and cut up typed notes or transcripts separately.

Label each piece of data so you know which participant number, workshop and task it relates to. Make sure you leave out any information which could be used to identify research participants.

If your research involves watching someone do something, categorise your notes by:

- what the participant said
- what the participant did
- what the researcher/observer/facilitator thought

Labelling gives you a record so you can understand and — if necessary — explain how decisions were made.

Choosing your participants

Plan your session to make sure you involve the right people and make best use of the time available. Who you invite will depend on your project, the goals of the workshop, the project phase and the time and space available.

There should be a maximum of 9 participants per facilitator, who can be split into smaller groups for some activities. Participants can be more likely to contribute if they're in a smaller group. You can easily scale a workshop with the support of more facilitators.

A mix of people from different disciplines, roles, or with different relationships to the service is essential to provide the perspectives you need.

Think about how the participants will relate to each other and the different levels of experience and understanding of the project. Also consider what skills are needed to take part - such as reading or analysing research data - and what experience people may have of this.

You should consider people from these groups:

- users and stakeholders of the service
- people who have observed research workshops
- people involved in making decisions about the design of the service
- people whose work will be directly affected by the workshop

Making participants comfortable

Building trust is an essential part of collaboration. Treat participants as equals, with respect and care. When you first invite them to take part, consider their time and commitments. Explain clearly:

- the value and goals of the workshop
- what you expect from them
- anything they need to do in advance

When planning the workshop, make sure:

- the format of the workshop lets all participants contribute, regardless of any disability
- the location is easy for everyone to reach and enter and has suitable facilities
- you provide extra support for those who may need it
- all participants understand and agree with any 'rules of engagement' — for example, behaving appropriately and keeping conversations confidential, especially if you're sharing sensitive data
- participants who have contributed data to the workshop are not in a group looking at their own information
- to limit the number of non-participants in the room

Make sure there's enough space for small groups to move around. The wall space should be big enough to display the research and to allow the groups to work on it.

You may want to record the workshop with photos and/or film. This can be helpful to share the findings more widely afterwards. Get permission from the participants and give them the chance to opt out of being recorded if they wish. This should be included when you get consent.

Planning the workshop activities

Create a workshop plan based on your research and aims. You may already have themes, assumptions or user needs to validate — think about how you'll present them to people who are not as close to the project as you.

For guidance, timings and activities download the Collaborative Sensemaking Template.

What to bring to the workshop

To run the workshop you should bring:

- data from the research you've carried out
- any additional research for supporting evidence
- sticky notes
- marker pens

Facilitating the workshop

A facilitator will prompt discussion and keep conversations focused. This could be someone with facilitation experience, but if you want to reduce bias you should use someone who is not attached to your project.

As a facilitator, your role is to draw out the thoughts and experiences of the group, asking questions rather than letting your own opinion influence the discussion. Participants should be doing most of the talking.

Question any individual opinions or anecdotal evidence. Keep bringing the discussion back to the research data. The workshop is about understanding the problem so keep the focus on the problems, challenges and barriers, not on possible solutions.

The workshop is an opportunity to review and discuss, not to reach agreement on everything. If the discussion gets stuck on something, move on to the next topic.

Writing up the results

At the end of the workshop the participants will provide you with one or more sets of themes. You must now bring these together and sensitively balance and judge the different perspectives.

You can share the results in different ways, for example a concise presentation or report. This should summarise the research, what it means for the project and how it can help the project team take action.

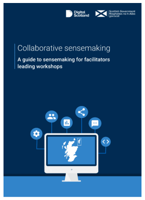
Before starting on the report or presentation, write up the workshop notes and data. This will help you form a story around the findings, making them easier to describe and communicate.

You should also present and discuss your findings with any workshop participants who are not on your project team. This only needs to be an informal presentation.

Read more about communicating findings.

Privacy Cookies Accessibility scottishgovernment on GitHub

gov.scot



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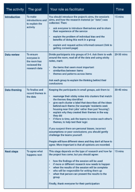
Scottish Government Riaghaltas na h-Alba gov.scot

Collaborative sensemaking

A guide to sensemaking for facilitators leading workshops



The activity	The goal	Your role as facilitator	Time
Introduction	To make introductions and to explain the activity	You should introduce the project's aims, the session's aims, and how the research material (or "data") was collected. Then: • ask everyone to introduce themselves and to share their experience of the service • explain the problem of individual bias and the benefits of doing this work in a group • explain and request active informed consent (link to getting consent page)	15 mins
Data review	To ensure everyone in the room has reviewed the research data	Divide participants into groups of 3-4. Ask them to walk around the room, read all of the data and using sticky notes, mark: • the items that seem most important • similarities between items • themes and patterns across items Ask each group to explain the thinking behind their conclusions	20-30 mins
Data theming	To finalise and record themes in the data	Keeping the participants in small groups, ask them to: • rearrange their sticky notes into clusters that match the themes they identified • give each cluster a label that describes all the ideas behind each theme (for example 'residents seek housing near their jobs' rather than just 'housing') • explain why they created their themes in the way they did • if there is time, ask the teams to review each other's themes, to help test their logic If you suspect there are personal biases, incorrect assumptions or poor conclusions, you should gently challenge the teams yourself. People will have different views and they don't all have to agree. More important is that all opinions are recorded.	30-40 mins
Next steps	To agree what happens next	This stage depends on the type of research and how far the project has come, but you should agree: • how the findings of the session will be used • if more or different research now needs to happen • when the results of the session will be complete • who will be responsible for writing them up • when that person can present the results to the group Finally, thank everyone for their participation	15 mins

I take it we mean role="search"

Add role= research to keywords search

Ticket to be raised: change buttons to lower case (not just buttons and not just sep)

Remove text-transform: uppercase from button text

General

- Buttons are all in All caps – hard for people with dyslexia
- When the page is loading we can't see anything visually but the loading sign; the screen reader start telling what's on the page – wasn't a problem for our participant though but someone who can see a little and use a screen reader could be confused?
- NVDA: can't use normal set of keys to find the searchbox

Further testing to see if it's an issue for partially sighted people (loading page – not seen but already read)

UR on if delay is required for assistive techs when spinner appears before reading out content

We do use ARIA to announce that "Results are loading, please wait."

```
<p class="interstitial__subtitle-loading sr-only" aria-live="assertive">Results are loading, please wait.</p>
```

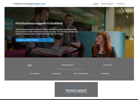
Investigation required on go to (QA)

Drop sr-only "Go to" from nav links

Check if focus outline is native browser if so needs overridden

Homepage

- it's clean, there isn't too much
- hearing Go to repeated is annoying
- hearing some links more than once is confusing – makes it harder to know where they are on the page
- Browse support vs Browse all support services
- Blue focus hard to spot on grey footer (was not an issue for our participants)



FindBusinessSupport.gov.scot

Find business support in Scotland

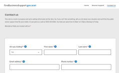
Might be simpler just to add Call us on inside the <a>

We could use a <desc> element in the svg but not sure of whow well supported that is

SVG is not part of the link and is not an <img> so can't use alt attribute

Contact us - from the footer or header

- Lots of participants would like an email address to contact us
- Text is not always read by screen readers if they navigate via tabs or arrows
- When text is read, it is sometime understood as the website being under maintenance



FindBusinessSupport.gov.scot

Contact us

Ticket to be raised: make phone number a link (High)

Phone number important for screen reader users

Email address is in accessibility statement, make sure it's easy to find for sr users

Felt there were too many tooltips, some unnecessary (addressed below)

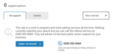
Ticket to be raised: text to be user tested / re-written (high)

Ticket to be raised – text should be read by screen reader

Telephone icon should have an alt text as it's not obvious the number is a phone number to contact us

Contact us - from a null search

- Text is not read by screen readers if they navigate via tabs or arrows but they get to the submit an enquiry button and the phone number
- When text is read, it is sometime understood as the website being under maintenance



0 support options

This site is a work in progress and we're adding services all the time. Nothing currently matches your search but you can call the referral service on 0300 303 0660. They will advise on the best public sector support for your business.

0300 303 0660

instructions after field (QA to investigate)

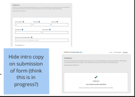
Maybe need a tool tip for phone to say the aera code is needed (or just validate that there is at least 7 numbers?)

remove tooltip for name , email, and phone (Medium)

Submitting an enquiry

- Lots of tool tips are not needed and annoy the participants (names, email and phone) and they are read each time for screen readers
- Instructions for input fields in the form are after the field? (JAWS)
- Submit an enquiry: the text and mandatory fields mention on the confirmation page are confusing when read

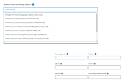
Hide intro copy on submission of form (think this is in progress?)



Update 'can't find your company' copy to include "click/tap here to …" (High)

The business name and trading address

- Entering name / address for company or having to type it again when the tool can't find address – confusing
- Address1 , then 2 then postcode, not easy for Screen reader users, some had put the town in Address 2
- In the business address drop down form, people didn't know that the manual entry was a selectable option

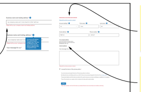


Further testing around error messages

Update error message wording to be clearer and say what the problem is

Errors on the form page

- When you put your company name and address in the input, but this is not in the list, the error doesn't make sense
- the way we display the errors would make it hard to spot for a colour blind users, the 'guilty' field is in blue and the error message is underneath in red but not bold (not something that was picked up during the session – just an extra insight?)



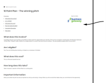
Are you trading was pre selected, so most just skipped it

Improve error display for each error in the address fields

Mandatory fields are hidden behind change address (city, business name, postcode, data8, doesn't always provide all 3 generic errors is displayed at bottom of the page blocking the user from resolving the error themselves: suggest showing all mandatory (maybe check how Company house do that on their website as an example?)

Service page - general

- They all liked the structure, the simplicity and the layout
- Shortcut links where understood for what they are and giving a clear step by step feel
- Most felt it was the right amount of information
- Some felt the content was some time not simple enough (depends on the service…)
- Links and call to action where confusing (next slide)
- The partner logo is not understood by a person using a screen reader when they don't hear 'Support provided by'



10 Point Plan – The winning pitch

Ticket to be raised: logo description to say support provided by as opposed to just BG

Image is preceded by text saying "Support provided by"

If we amend alt attributes we would need to hide the text from ATs to avoid redundancy

Ticket to be raised: links and CTA under next steps to be reviewed, too many links (medium)

Assess as well the potential links on the page in other sections (medium)

Next steps – links and CTA on service page

- Some links say download but take you to a website, or are not clear heard out of context
- People don't get they go to another website and when they understand that they are, then they are not sure if it's a specific page or the homepage of the partner (CTA)

Next steps

CONTINUE TO OUR PARTNERS WEBSITE

Ticket to be raised: front load links (High)

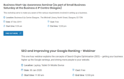
Find out more annoying (UR needed)

Existing ticket: external link highlight, currently in backlog to be implemented with SR in mind

Little icon not understood (UR needed)

Events

- Find out more, is annoying when heard multiple times on the search results – we should front load
- Level of information is good and clear
- the little icon on the button is not enough for the customer to understand they are taken to another website
- Might be worth mentioning to BG event manager, that online event Location is appearing as : Laptop – tablet and mobile – this comes direct form the API



Business Start-Up: Awareness Seminar (As part of Small Business Saturday at the Business & IP Centre Glasgow)

This workshop aims to make you aware of the various requirements involved in setting up a business.

Location: Business & Ip Centre Glasgow , The Mitchell Library North Street, Glasgow, G3 7DN
Date: 07 Dec 2019
Cost: Free
Start time: 9:30 am
End time: 12:00 pm

SEO and Improving your Google Ranking – Webinar

This one hour webinar explains the concepts of Search Engine Optimisation (SEO) – getting your business higher up the Google rankings, and driving more people to your website.

Location: Laptop, Tablet Or Mobile Device
Date: 30 Jan 2020
Cost: Free
Start time: 11:00 am
End time: 12:00 pm

```
<a class="cta  cta--primary cta--icon-right" data-results-url="url"
href="https://www.bgateway.com/events/business-start-up-business-planning-14127"
target="_blank" rel="noopener">
    <span class="cta__text">Find out more</span>
    <span class="sr-only"> about </span>
    <span class="sr-only" data-results-content="name">Business Start-Up: Business
Planning</span>
    <span class="sr-only"> link opens in a new window</span>
    <div class="cta__icon">
      <svg class="icon icon--cta-external-link" aria-hidden="true">
        <use xlink:href="/assets/images/symbols.svg#external-link--thin"></use>
      </svg>
    </div>
</a>
```

Add aria-hidden attribute to this

Remove this

maybe add the 'Find out more' piece before the 'link opens in a new window'?

Some screen readers skipped from searchbox to first result without saying how many result were found (could be useful for users to know how many they are so they don't try to tab through all of them)

Ticket to be raised: can we skip to results on SR after search performed? (medium)

Need to review DOM structure, place filter under tabs?

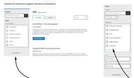
Ticket to be raised: code to be restructured to more logically take SR users through the page (High)

Search results

- Search / filter / types / browse – there is confusion around all these terms and functionalities
- Ensure if Events is part of All support or not. Usually initially think it is, but when checking the numbers, they realise it's not
- There is no H2 heading level on this page
- On occasion, the screen reader would start reading everything on the page?
- The reading order of the listings page on a screen reader (You Search and then……no results. Just lots of Filters). Confusing on a screen reader.

Tabs and corresponding filters

- Tabs: how they are used and what happens with the filtering options when changed is not clear for participants (even for those who can see)
- Framing / design of the search and filters to make it clearer what the user is doing
- Different filters for each tab is often not noticed
- List boxes for Filter choices (There were a few things that kicked screenreaders in and out of Edit Mode)
- Use of list boxes, where users didn't understand how to interact with them properly



Search for business support services in Scotland

Aria live to remove – screen reader starting to read everything on occasions) (Steven Park)

Clear all filters: not used, not noticed

SR users have difficulty orienting themselves, especially for events tab

How can we make it easier for SR users to get a mental model of layout?

Further testing required around tab labels. These have proven fine in previous testing (low)

Ticket to be raised: categories list says option 1 of 6 instead of 1 of 28 (event categories) until see more is highlighted (High)

Could we create some kind of in-page navigation landmark, with a keystroke to return to it?

Steven is already working on this

https://se-qa-singleentrypoint.azurewebsites.net/browse-support/