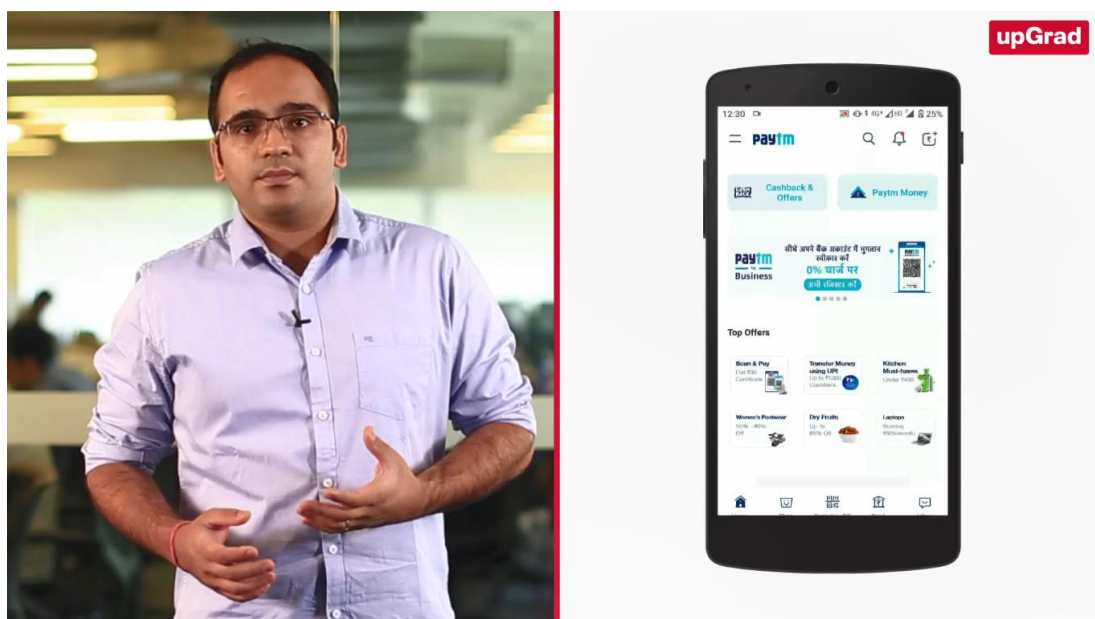


Transcription

Contextual Inquiry



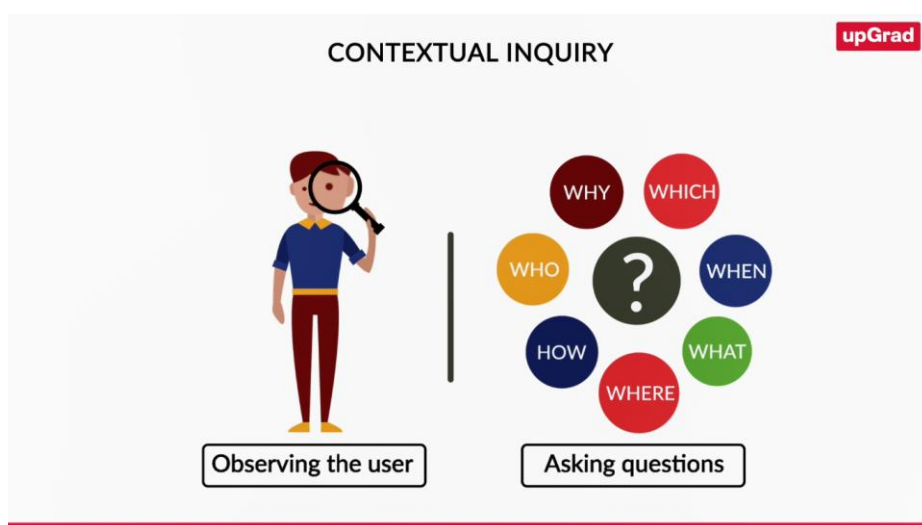
Hey there and welcome. In the previous session you got an in-depth idea of how you can conduct interviews as a part of a user research. Now, let's move ahead to another way, you can conduct research, contextual inquiry. Suppose you're conducting user research for your product say a mobile wallet. You conduct large-scale surveys and you even interview users, but there is still a nagging question in your head. How will new consumers actually use this app in their lives? What are the exact conditions they'll be surrounded by when using your mobile wallet.



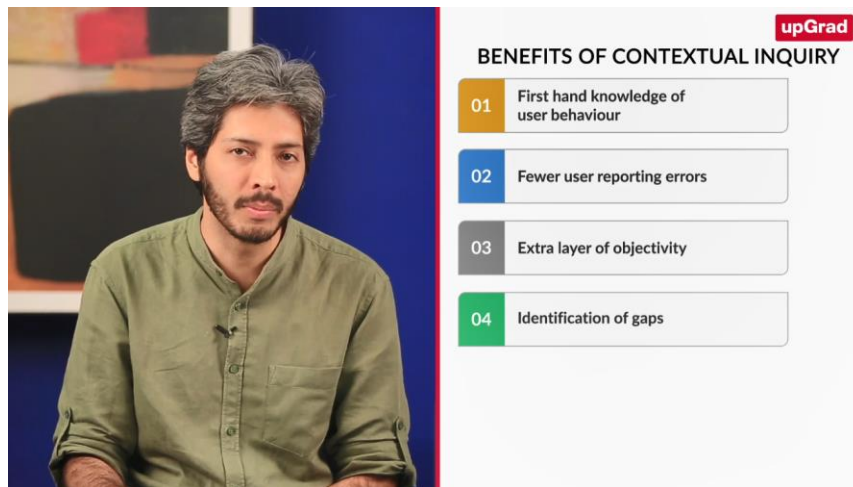
For instance, how will they use it at a supermarket as opposed to a petrol pump? How will they use it in conjunction with other apps? Can you get an answer to these questions by conducting surveys or standalone interviews? I guess you could simply ask your users these questions, but users tend to misreport things, and sometimes they themselves do not have an understanding of their behaviour and they tend to behave differently in their national habitat. How will you take users environment into account, while conducting research? This is where contextual inquiry comes in. But what exactly does contextual inquiry mean? How do you carry it out? Let's hear it from a subject-matter expert.



What is contextual inquiry? Contextual inquiry is a user research method quite similar to interviews with the difference that you will observe users performing tasks in their own habitat and would be asking what they are doing.



The focus is on observation rather than straightforward questioning.



So let's understand: why do you need to conduct contextual inquiry first. It helps you gain first-hand knowledge of your probable user behaviour. Sometimes, while filling a survey or during an interview, the user might miss report things, contextual inquiry helps you take care of such errors.

Generally, while filling a survey people try to appear as social and cheerful. So to do so, they may choose to answer what would appear to make sense to them. Sometimes there is a lack of objectivity, even in collecting facts. Observing user behaviour allows you to add that extra layer of objectivity.

How often do you check your phone for messages?

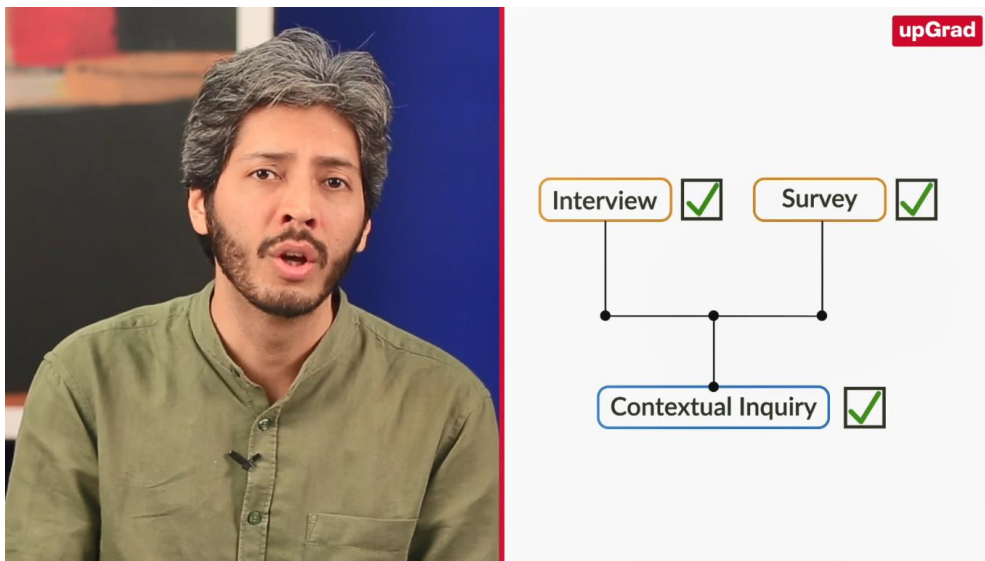
- ☐ Every 5-10 mins
- ☐ Every 10-15 mins
- ☐ Every 30-40 mins
- ☐ When I get a notification

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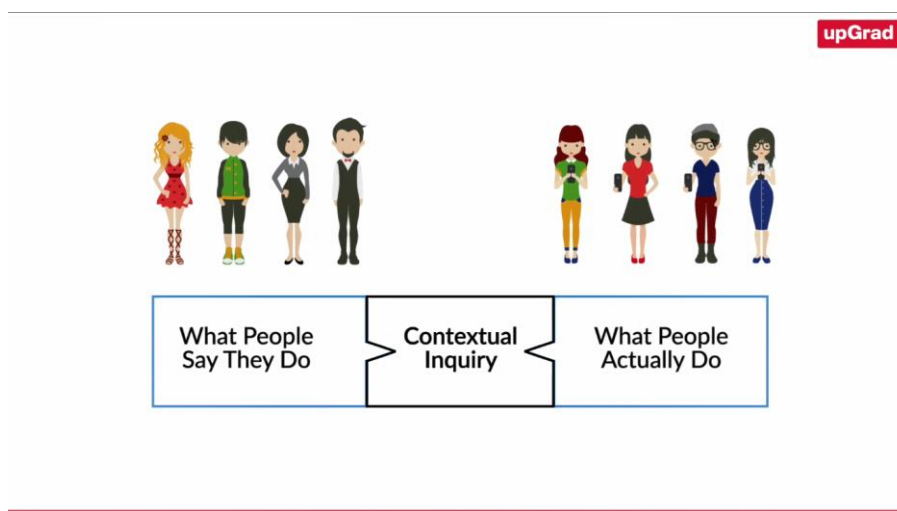
For example, to a question asking how many times you check your phone or message your friends. Users may say they do it every 10 15 minutes, but when you actually observe them in normal day-to-day life, it will help validate the real facts. People unconsciously do a lot of things and such things are left out if you don't observe users yourself.

You need to conduct a textual inquiry to observe the physical environment. Although you may be developing a product for the digital space, but the real-world environment, where the user will use the product is equally important. You can put yourself in the users shoes more easily after you have seen him performing a particular task and can identify gaps in the problems faced.

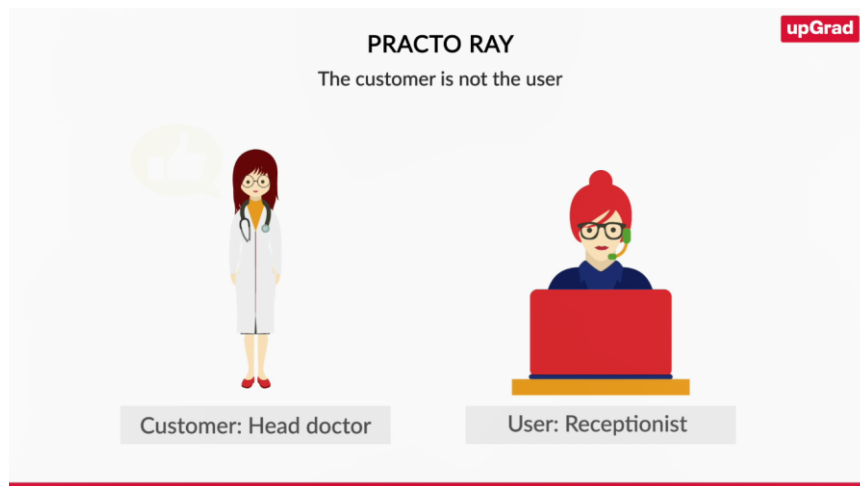
So at Practo we observed how busy doctors really are. In a 30-minute meeting, the doctor might easily be interrupted 5-6 times. Calls from an important patient. Another patient is waiting outside in the lobby and hence what they require is a clutter free intuitive software which allows them to do their job in a faster and easier manner.



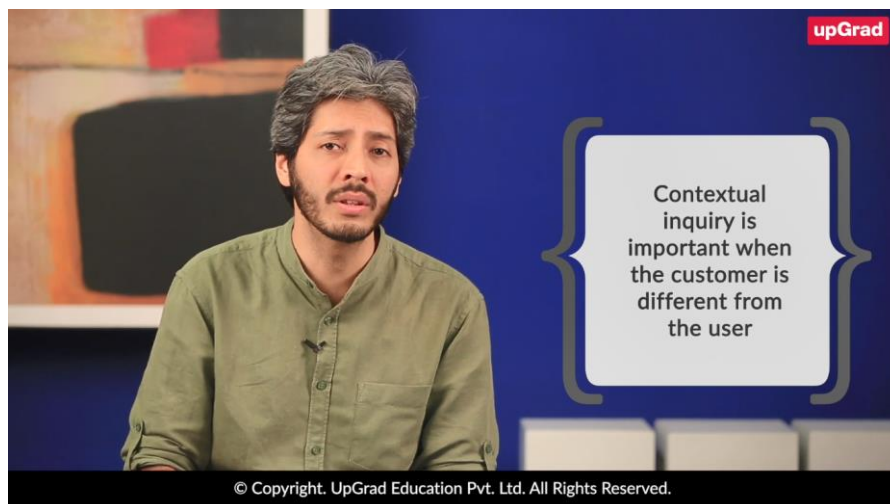
Now that we have learned the importance of conducting user research, you should be thinking about when do you need to conduct contextual inquiry? It is good to conduct contextual inquiries in the discovery phase of your user research.



After you have collected and analysed user data through initial surveys and interviews, you should conduct contextual inquiry, because you will notice that there is a disconnect between what people say they do and what they actually do. Finding out what this gap is what makes a product successful.




Practroray is often used by the receptionist's, whereas it is actually purchased by a head doctor who owns the clinic. In such cases when you call the doctor, he gives positive feedback, but when you actually go to the clinic and ask the receptionist about how they use the product, the story sometimes is different. The receptionist might be facing difficulty in performing even small tasks while using the software.




Hence, contextual inquiry becomes all the more important when the customer is different from the user.



Now you know why contextual inquiry is important. It gives you a chance to actually observe your users behaviour in their environment, rather than simply asking them questions about it. So how do you conduct contextual inquiry? Let's go ahead and learn about the process.





CONDUCTING A CONTEXTUAL INQUIRY

- 01

Identify problem statement
- 02

Pick the location
- 03

Identify target group
- 04

Ask specific questions

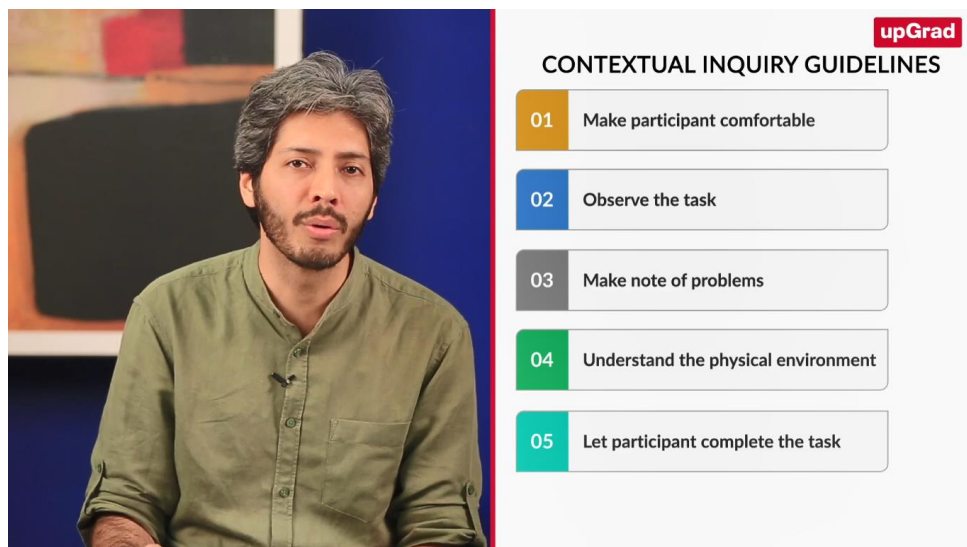
- a. How do you usually pay for home-delivered food
 - b. Are you comfortable paying online

So as a product manager how do you go about conducting your contextual inquiry? Before conducting a contextual inquiry session you should be clear on a couple of things. First, you need to identify the problem statement and use something known as the 5w method, the what, where, when, why and who principle to list the problem.

For example, if you were looking to do an inquiry for a payment product, your problem statement would read something like what are the problems faced by people who want to order food online through their mobile devices in the comfort of their homes or offices. The next thing which you would figure out is that where would you conduct such a study, for example, people generally order food from their houses or at their offices?

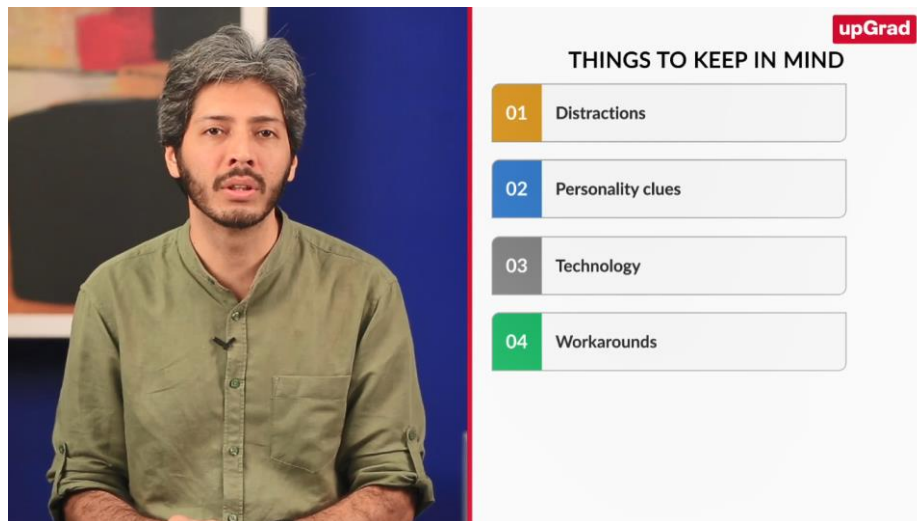
Then you need to identify your target group. It would generally consist of potential users of your product, and you can select these based on information like age, geography and product usage. For example, for the food ordering app the target group would be young urban people who don't want to cook food and would like hot and tasty food delivered to their doorstep.

Finally, keep in mind to ask interview questions which you specifically want to ask during the study. For example, to see how comfortable people are paying for online food delivery you could ask a question like how do you usually pay for home delivered food, and, if, yes, are you comfortable paying online.



During the actual session following these guidelines would vastly increase the output of the study. You should make sure that the participant feels comfortable and is performing the task as you would normally. To gather precise insights you should ask the participant to show you how they would perform the task that you are interested in learning more about. Keenly observe where and when problems occur for the users. Also understand everything about the physical environment around the user. This could help you gain valuable insights like what influences their decision, what distracts them and what hampers the usage of the product.

Next you should always let the user complete the task interrupting them in between will make them conscious of your presence, and they may not perform the task as naturally as they would normally. After they have completed the task, you should ask questions about any behaviour that you want more information about why they chose to do what they did. Ask open-ended questions to find out more so, for example, I noticed that, while adding dishes to the cart, you selected none of the customizations available at that time. Can you tell me more about that? You should also take notes and videotape the session, which would help you later in sharing the information with your team. You can also have the users view the recordings and let them see how they behaved and question them about specific points. Many users are sometimes surprised at how they behave and will provide great insights into their behaviour helping refine the research further.



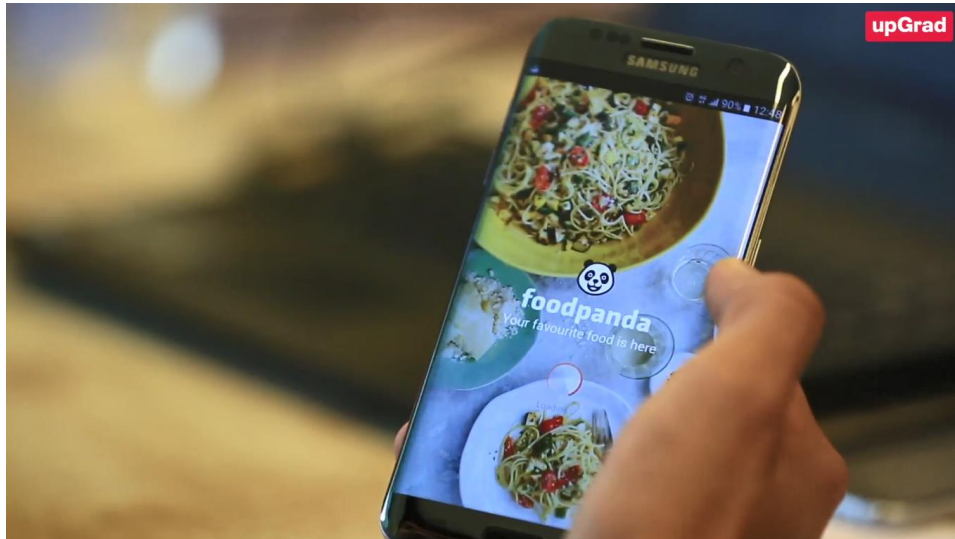
Conducting a contextual inquiry may seem easy at first. You just have to observe people doing stuff, but to make sure that you gain the most out of your sessions there are some things you should keep in mind:



1. Distractions. The user may well be interrupted by phone calls, children, emails, colleagues or any number of additional distractions. You should take a note of how frequently these distractions occur. Afterwards you could think how your product can help accommodate for these.
2. Second personality clues. Is the environment messy? Is it organized? Things like this can give you a lot of information about how the user organizes and remembers information.
3. Third, the technology? What kind of technology is the person working with? What is the phone reception like?
4. Forth workarounds check if your user is using any workarounds for systems which aren't meeting their needs. See if you can spot any quick reference bits of paper or links on their computer and ask about them? For example, a user might use post-it notes to store the relevant information for use later on and stick them on an easily visible space like a fridge. A user may have liked some particular dish from a restaurant and might

have saved the bill to recall it later. Learning about such workarounds will help you add features to your product.

Now, let's look at an example for how we would conduct contextual inquiry.



Interviewer: Manu, thanks for being with us today. What we are doing today is you know we want to see you use the foodpanda app and it's lunchtime so I'd love for you to order lunch for both of us and while you're using the app and you're taking the various steps in the app, I'll perhaps prompt you or ask you to do certain things and then at the end of this process we will see how it goes and I'll ask you specific questions about your experience of using the app. So, let's start.

Interviewee: Okay, so yeah, this is the foodpanda app in my phone. Okay, so let's start and I will give my phone the access to locate me. Do I need to log in or sign up or do something like that?

Interviewer: Yeah, go for it. Let's see if we can order a good burger today.

Interviewee: Okay, I don't like McDonald's so we'll have to figure out some other restaurant. Let's go for Burgerking then. Veg, non veg any preferences?

Interviewer: Let's try an order a Chicken Whooper.

Interviewee: Increase of quantity lets say 4 and any side order, drinks?

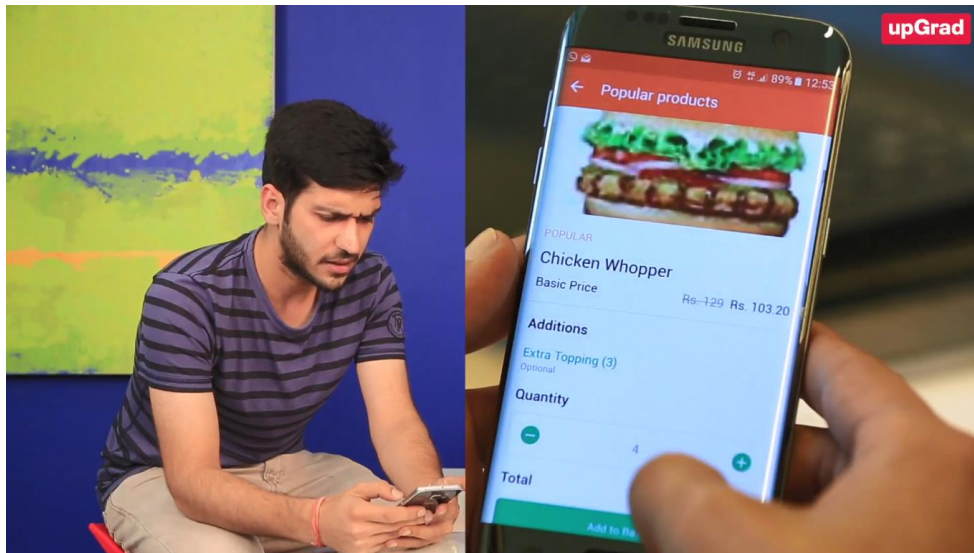
Interviewer: Yeah, let's try an order Pepsi or something.

Interviewee: There is no Pepsi.

Interviewer: Let's try and order a Chocolate Shake.

Interviewee: Now I have to sign up. The process is actually pretty simple though. Okay looks like I'll have to connect it with Facebook. That's a problem. There's no cash delivery option?

Interviewer: Looks like there isn't.



Interviewee: Or is it, does it depend on the restaurant?

Interviewer: Possible that depends on the restaurant.

Interviewee: I don't remember my Paytm password. So that's a problem.

Interviewer: So Pranav couple of things that I saw up. One was that you struggled while you were logging in. What was going through your mind? First, you decided to enter using an email ID and then, while you were filling up the form you kind of stopped, you went back and then you decided to login using Facebook. Why did you do that?

Interviewee: That's because I didn't remember my password. My email ID password on my fingertips because I have been using, I've been switching between my personal email ID and my office email ID. So I didn't remember the password of my personal email ID as really well, so that's why I thought that okay I'll switch to Facebook and when I switch to Facebook. I realized that, oh, I don't even remember my facebook password. So yeah that's the main reason.

Interviewer: The other interesting thing that I noticed was that when I said that, why don't you order burgers for us. You decided to directly scroll through the list and look for places which could potentially sell burgers, and you said no to McDonald's, and then you said yes to Burger King. Why didn't you search for the word burger?

Interviewee: That was just an intuitive reaction to just scroll down the list and look at you know, like various other options other than burgers as well. So in this particular case, I'm assuming that you knew that Burger King serves burgers. Now suppose you did not, suppose we had decided to order biryani and you were new to this area and you probably didn't know which restaurants serve the best biryani. Would you have searched?

Interviewee: No, I would have. I would have basically typed in biryani and searched for the word biryani and the restaurants that would serve it.



Interviewer: What are the other thoughts that were going through your head? While you were going through the flow, what appealed to you about the product and what didn't?

Interviewee: The product is pretty simple to use.

Interviewer: What is it that you found simple?

Interviewee: I mean it's, you can just login, I mean it. You essentially do not have to login and until you have to place an order. So you can just scroll through the restaurants.

Interviewer: And that's a question you asked. Should I be logging in first? So you like the fact that you were directly able to search for the restaurant and search for the items that you want to order. Okay

Interviewee: And apart from that, it's pretty, I mean the app is pretty fast and is simple to use. It's very easy to use. I mean, if you essentially remember your passwords, then even the ordering process is very simple, just like log in through your account and order. So yeah the app is pretty simple to use.

Interviewer: You did struggle a little bit while finally choosing a payment option.

Interviewee: There was no cash on delivery option for placing an order from Burger King. Now that may be dependent on the restaurant you're ordering from or it might be something else.

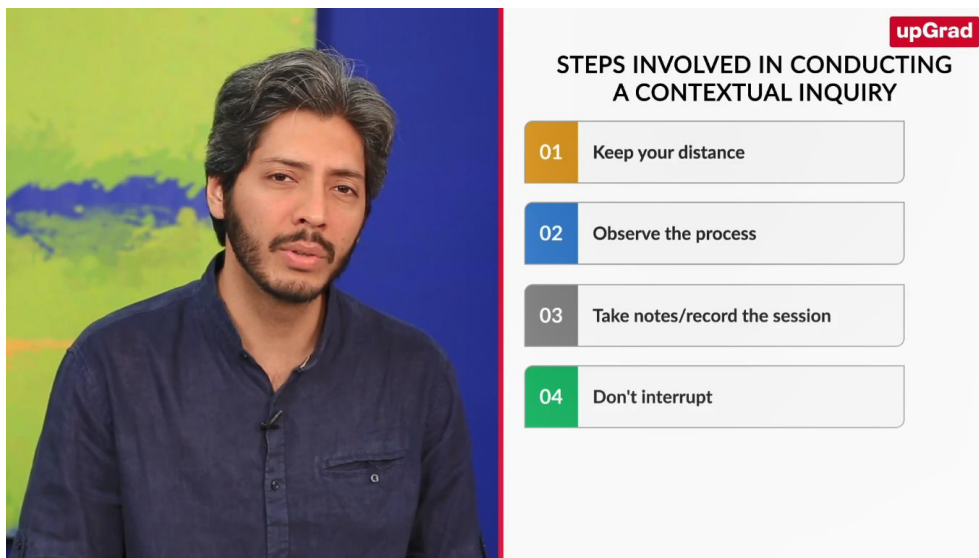
Interviewer: So were you aware of this?

Interviewee: No I wasn't aware of this.

Interviewer: Would it have made sense for the app to inform you about this.

Interviewee: True yeah. It would have.

Interviewer: I hope you enjoy your lunch. Thank you.



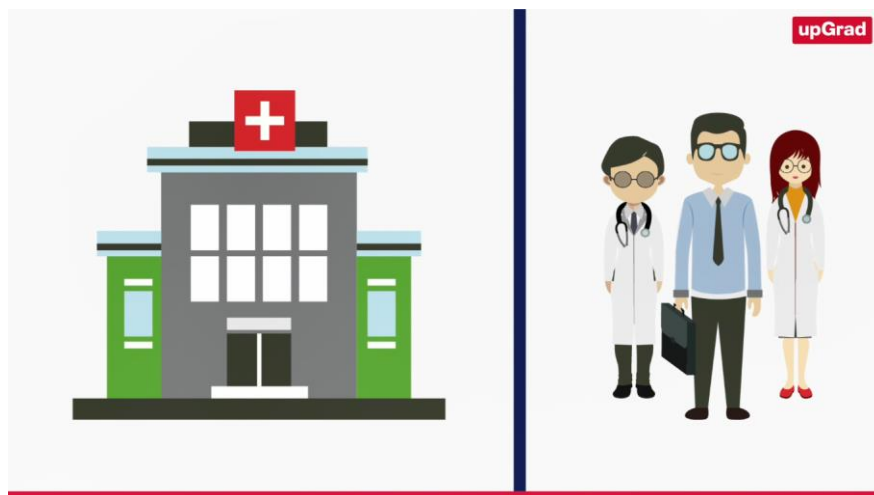
So we conducted a contextual inquiry with our test subject Manu and we saw him using a food delivery app food panda. He was using the app for the first time. A couple of points are that you should take note off.

1. For one when you're observing a candidate while you're close to them and you are looking at this screen and you're trying to observe what they are doing make sure that you keep your distance. Also, you don't want them to become too conscious of your presence.
2. The other critical point is to be very observant about the kind of steps they are taking. Your prompts, and your hints should not actually take away from their own experience if they were doing this on their own, they could they should have been able to perhaps continue in the exact same manner.
3. What you need to make a note of is how the user experience of the app works for them. Does it allow them to easily go through the flow easily? In this particular case, find the right restaurant place an order. You know log into the app and we saw that there were issues with the subject, logging in and then being able to place the order and figuring out ways in which they would pay. So make sure that you are keeping a very close tab on all these steps.
4. Ideally you want this session to be recorded, but if not, you should make a lot more points in your notes.
5. The other thing, of course, is don't interrupt the flow immediately. If you see that the user is struggling, don't necessarily ask them why they are struggling or what is it that they are finding difficult. This is something that you can potentially do in a follow-up question, and that is why it's important to make notes while the inquiry is going on.




You now have an understanding of contextual inquiry and how its conducted. Now let's take an industry example to augment your understanding. You'll see how conducting regular contextual inquiry sessions help the product management team at Practo.


Now, let's look at an example from Practo and how a contextual inquiry is conducted there. At Practo conducting contextual inquiries to assess a doctor's need is an integral part of the product development process. Doing contextual inquiry at a doctor's clinic is one of the best ways to find out the pain points of the user and what features they would like to see in the product.



As a part of their job a practo product manager is typically required to meet at least two doctors every week. Now, a typical search session would be that a product manager sits in a doctor's office and sees how the doctor or the receptionist go about doing their work. We try and take note of what are the kind of distractions that they are faced with. We try and take note of how difficult it is for a receptionist to create a new patient ID? How difficult it is for them to add a prescription digitally to their records, to set up a follow-up appointment. Looking at all these workflows in the habitats in which they occur, gives us a deep insight into how we can improve the overall look and feel of our

products and how we can improve the user experience of our products. This simplifying off the work process for a doctor or for the receptionist is what helps us build a better product, and that is why contextual inquiry is so important.





SUMMARY: CONTEXTUAL INQUIRY

- 01 Understand contextual Inquiry
- 02 Conducting a contextual inquiry
- 03 Following guidelines
- 04 Observing your participant

- a. Distractions
 - b. Personality clues
 - c. Technology
 - d. Workarounds

Wasn't that a great session? You saw how changing your user research process makes a lot of difference to the kind of insights you get. Contextual inquiry helps you get a tangible idea of how your product would be used in the real world, and in this session you got an in-depth understanding of this research method. So, let's recap what you learned.

We started this session with a discussion on what contextual inquiry is and why it's important. Contextual inquiry allows you to observe users in their natural habitat and ask them questions about it. It helps you gain first-hand knowledge of user behaviour and avoid errors. It ensures that the data you collect is objective. Contextual inquiry also gives you a chance to observe the users physical environment.

Next, you learned how to conduct contextual inquiry. There are a few preliminary arrangements you need to make first. Start with identifying the problem statement and figure out the setting of the study. Then identify your target group, which will depend on the nature of your product. For the actual process of contextual inquiry there are a few things you need to keep in mind.

1. Firstly, make the participant comfortable so that they behave naturally.
2. Secondly, keenly observe anything and everything they do. So you can note every detail of their behaviour.
3. Thirdly, let the participant complete the task. You should also ask them questions about anything you want further clarification on.
4. And, lastly, you can record the answers in the form of notes or a video. You also have the option of showing the participants their videos and then asking them questions about the specific aspects of their behaviour. The main thing to observe in a participant are the distractions, personality clues, technological challenges and how a user navigates the system which doesn't meet his or her needs.

We ended the session with two examples of how contextual inquiry is conducted. One was a mock example where the participant Manu who ordered food from the Food Panda app, and the second example was how contextual inquiry is

really conducted at Practo. So that's it for now. In the next session, you'll see how user feedback forms an important part of your research, so I'll see you then.

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