

Fluid

# Contextual Inquiry

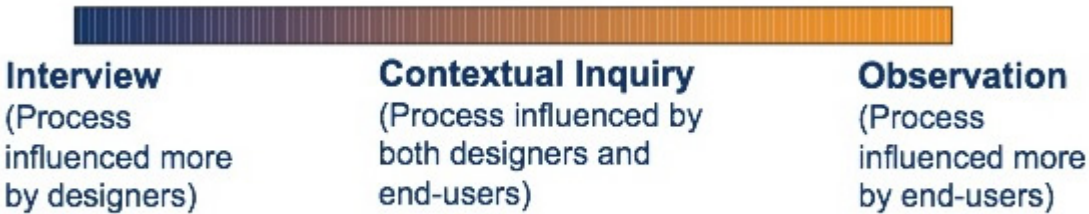
Added by [Daphne Ogle](#), last edited by [Daphne Ogle](#) on May 01, 2009 ()

Labels: [content mgmt](#) [contextual inquiry](#) [user research](#) [manual](#) [release](#)

"Users are perfectly capable of expressing their latent needs. They just can't do it verbally. That's why we do ethnography and empathic reasearch!" - Rich Sheridan, [Menlo Innovations](#)

## Contextual Inquiry Description

*Contextual inquiry* is a cross between interviews and observation and combines the strengths of both. In a contextual inquiry, the interviewer goes to the user and interviews them where they do their work. The idea is to interview users in the context of their work, while they are performing their tasks, asking them questions about what they are doing and why (when necessary) along the way.



Contextual inquiry is basically a structured field interviewing method, based on a few core principles that differentiate this method from plain, journalistic interviewing. It is based on the master-apprentice model of learning: observing and asking questions of the user as if she is the master craftsman and the interviewer is the new apprentice. It is more a discovery process than an evaluative process; more like learning than testing.

### Contextual Inquiry Resources

Getting Started With Contextual Inquiries:

- [Contextual Inquiry - Practical Guide and Checklist](#)
- [Sample Consent Form](#)
- [Usability Net Contextual Inquiry Definition](#)
- [Contextual Inquiry Basics](#)
- [Contextual Inquiry Primer](#)
- [Guidelines on how to ask questions](#)

### Current Fluid Research Projects

- [Fluid Content Management Research](#)
  - [Project Plan](#)
  - [Meetings](#)
  - [Content Management Research Models](#)
  - [CI Guide for Students](#)
  - [CI Guide for Instructors](#)
  - [CI Guide for TAs](#)
  - [Student CI Results Summary](#)
  - [Instructor CI Results](#)

[Summary](#)

## Contextual inquiry is based on four core principles:

1. A user should be interviewed in the *context* in which a product is used or the work is performed,
2. The user is a *partner* in the design process,
3. The designer must *interpret* the facts gathered about users' behaviors, their environment, and what they say to uncover design implications,
4. The interview must have a *focus*, allowing the interviewer to subtly direct it without using a set questionnaire.

Adapted from: <http://ithom.best.vwh.net/usability/> and *About Face 2.0*, Cooper & Reimann, 2003

## There are typically four phases in the interview:

1. **Traditional interview**, which is the phase where the interviewer gets an overview of the users work and starts to establish trust (by promising confidentiality and telling them reason for interview) with the interviewee. You may want to record the interview in this phase. If the interviewees interact with others, make sure that you get their consent, or if that is not possible, do not record. If the situation is such that the interview cannot be recorded, it can be beneficial to be two interviewers.
2. **The 'switch'**, from a traditional interview to a master-apprentice relation. It is important to tell the interviewees that we want to learn from them by watching and occasionally interrupting. Make sure that you have agreed with them on when you can interrupt. It is important to be able to ask users about things as they are happening, but at the same time not disturbing their work, for example during interaction with customers.
3. **Observation**. The users are the master and they 'run the show'. The interviewer (apprentice) should only be there watching and occasionally interrupt (when feasible) to ask questions about things that occurred. Do not hesitate to ask any questions that may or may not be of relevance. When at the interview it is difficult to know what is relevant or not relevant, so note down as much as possible. When observing the users, remember your focus and probe them depending on the focus.
4. **Summarization**. In this phase the interviewer should summarize what they learned during interviews to the interviewee. Be attentive to the interviewee's reaction to your summary, because though they won't always tell you if you have misunderstood something, their reaction can give you clues about this. If you didn't get it right, ask them questions and build the story together with them.

Adapted from: <http://www.usabilitynet.org/tools/contextualinquiry.htm>

## Tools to help with Contextual Inquiries

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### Selecting participants

Participants selected for user research should be representative of the user population you are analyzing. It is helpful to come up with [Fluid Content Management Research User Matrix](#) to help you think through which characteristics of your users are important for the research you are doing. They can also be used as a checklist as you perform user research to make sure you've talked to enough users with each characteristic. These [User Matrices](#) are a helpful place to start when analyzing characteristics of users in higher education.

### Contextual Inquiry Guide (aka Focus structure document)

A Contextual Inquiry Guide can help you stay focused and on track during the contextual inquiry. It contains general questions and areas of interest to keep in mind during the user meeting.

Some questions may be asked directly, but many others will just represent general lines of inquiry the interviewer wants to explore. Additionally, interviewers should be open to following other paths as dictated by the work performed by the interviewee. Although the meeting begins with a short traditional interview portion, once you transition into CI mode, think of it as a partnership formed between the interviewer and interviewee in order to create a dialog. The goal is for the interviewer to interfere with the interviewee's work as little as possible, blend into the surroundings, and ask questions when necessary to understand not only the user's opinions and experiences, but also his or her motivations and context.

This document should contain:

- intro reminder
- a goal statement for the research you can refer to that can help you keep focus during the CI
- a list of demographic questions and ice breakers you want to start with
- a list of general questions for the traditional interview portion of the CI

- categories of information you want to make sure you learn about as you observe users doing their work
- wrap-up reminder

## Contextual Inquiry Guides for Content Management Research

- [Contextual Inquiry Guide for Instructors](#)
- [Contextual Inquiry for Students](#)
- [Contextual Inquiry Guide for Teaching Assistants](#)

## Consent Form

Provide the participant with a document explaining the study. They should sign for their consent before moving into the contextual inquiry.

- [Sample consent form](#)

## Checklists

- [Contextual Inquiry - Practical Guide and Checklist](#)

### Child Pages (3)

[CI Consent Form](#)

[Contextual Inquiry - Practical Guide and Checklist](#)

[User Matrices](#)

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