

TOOLKIT

Contextual Inquiry

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INTRODUCTION

Why do we do this activity?

Observe users in their daily context to understand the “how” and “why” behind their behavior.

INTRODUCTION

When should you use this activity?

You can use Contextual Inquiry at any time. The data you gather can help to identify new opportunities to solve problems, or evaluate the quality of an existing solution.

INTRODUCTION

While you can conduct some observation remotely, there's no substitute for seeing a user's world in-person.



INTRODUCTION

Contextual inquiry places you into your user's environment, giving you the chance to observe their interactions in detail.

- It **helps you understand** specific behaviors, vocabulary, and the mental model(s) people use to approach tasks they perform.



Ready, set, go!

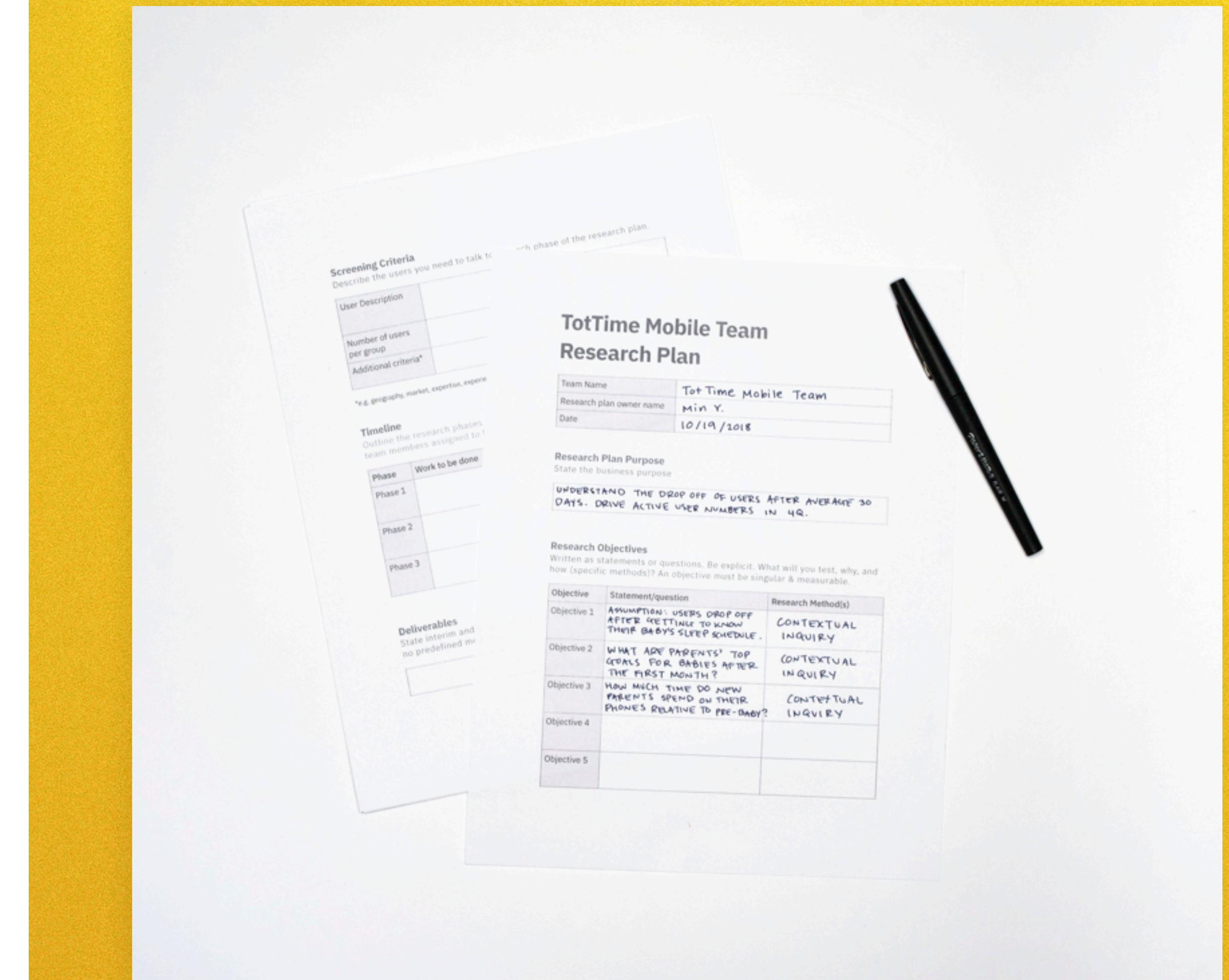
Contextual Inquiry

60 min

PLAN

Define your scope. As a team, come to agreement on the user experience you want to investigate. **Who** is your user, **what** are they doing, and **when** are they doing it?

- **Example:** How single mothers manage credit card debt at the end of the month



Contextual Inquiry

60 min

PLAN

Contact the users or Sponsor Users you want to observe, and explain the purpose of the inquiry.

- Provide as much detail as possible.
- **Don't get discouraged** if it takes some time to find the right opportunity and the level of access you need.



PLAN

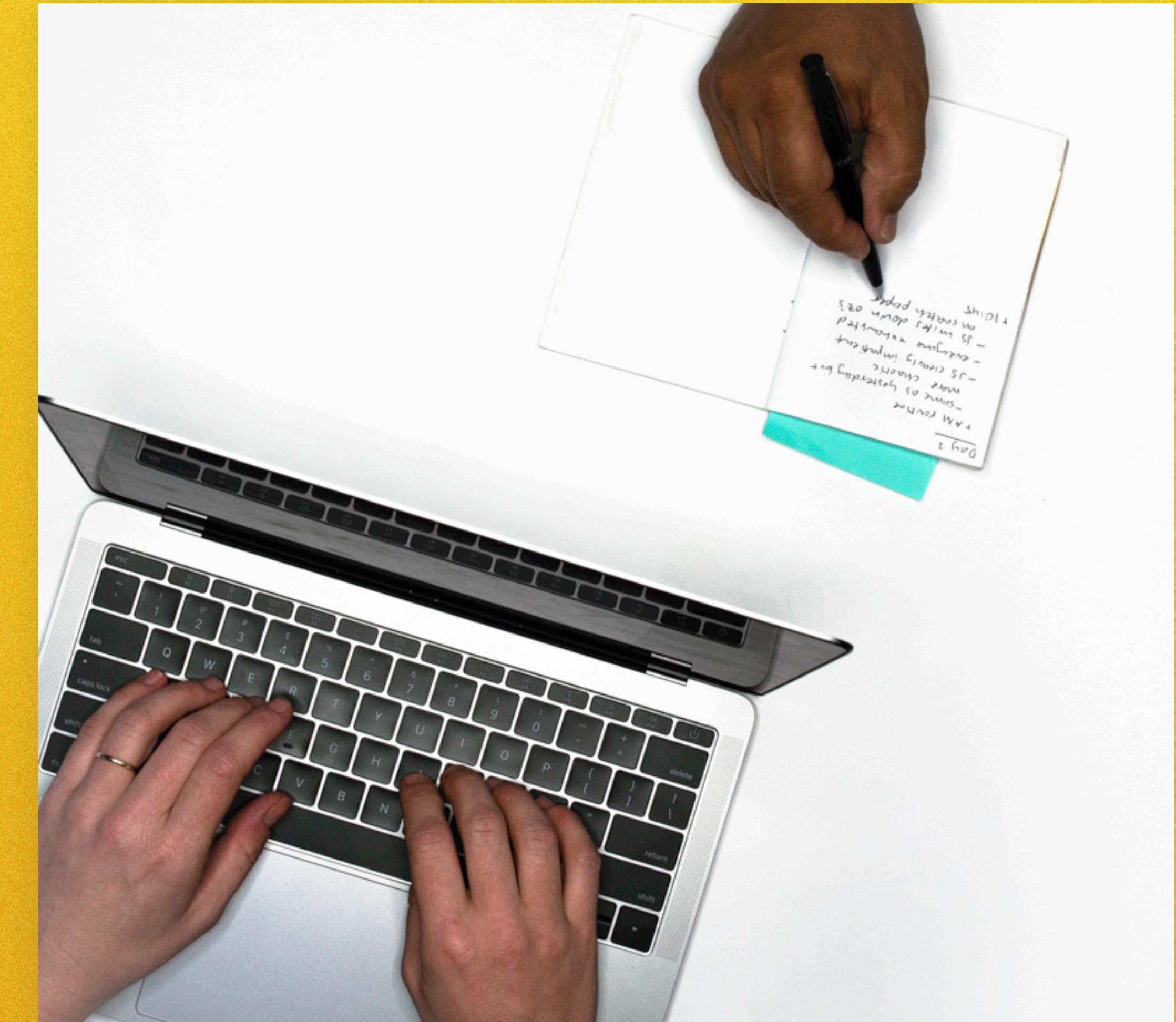
Nail down the details.

Next, schedule a time to visit the relevant environment. Obtain permission to record audio or video on-site when possible. Plan to send no more than two observers: one to ask questions, and one to document.

OBSERVE

When you enter their space, ask your user to show you their work or other tasks as if they were teaching you to do their job.

- Think of yourself as an apprentice. Pay close attention to their interactions with people and things in their environment.



CAPTURE

As you conduct your inquiry, record what you see without judgement. If you're one of two observers, make sure someone focuses primarily on capturing findings.



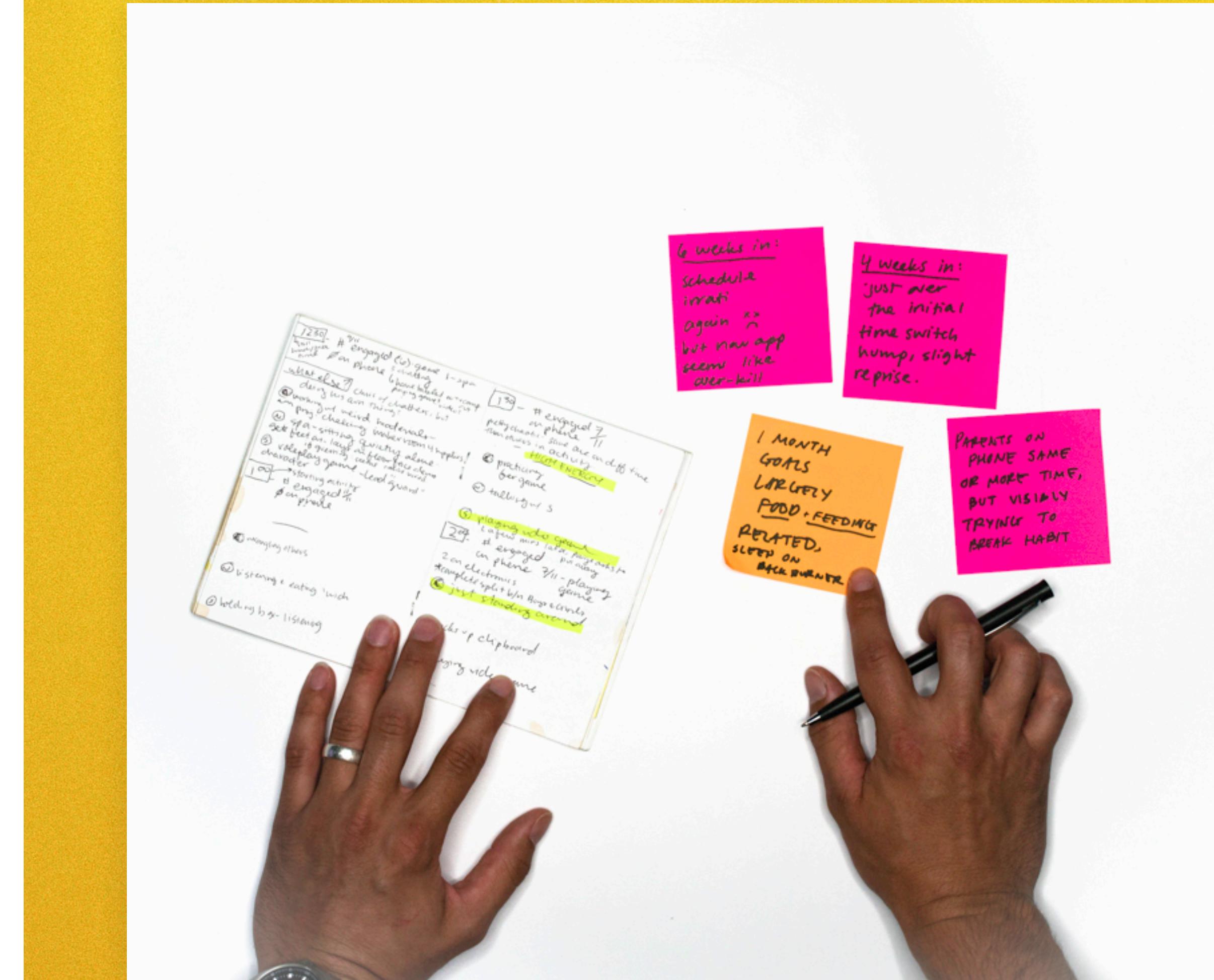
Contextual Inquiry

60 min

REFLECT

Directly after the inquiry, take time to reflect individually. Write down any takeaways and “aha” moments that stood out.

- Share your individual reflections with anyone involved in the Contextual Inquiry.



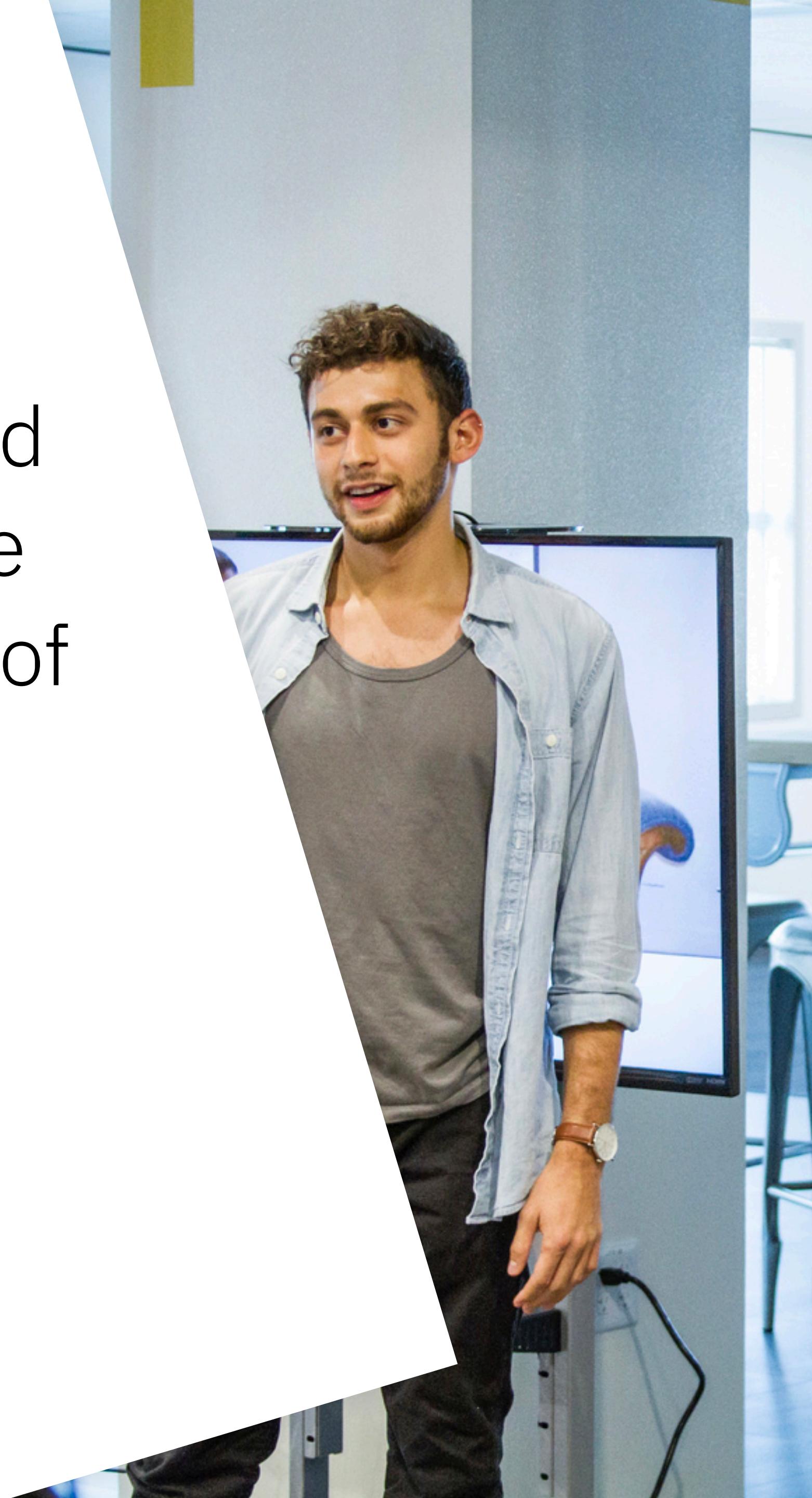
Contextual Inquiry

60 min

PLAYBACK

Synthesize further and play back what you've learned with the rest of your team.

- What implications does your research have for your greater team?
 - What can you make to demonstrate the insights you discovered?



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