

Enterprise  
Design  
Thinking  
by IBM

TOOLKIT

# Cognitive Walkthrough

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## INTRODUCTION

# Why should you use this activity?

Get insight into how your users feel about the various elements of your prototyped experience in real time.

## INTRODUCTION

When do you use this activity?

Use this method early and often when creating your prototype or solution.



# We suggest **60 minutes** for this activity. How much time you spend is up to you!

- **Write before you talk.** Write or sketch lots of your ideas on sticky notes *before* talking about them. During discussions, capture the main points on sticky notes and post to the wall.
- **There are no bad ideas.** Start big. Diverge to get everyone's ideas out there. Come back together to discuss, cluster, and seek patterns. Then, converge to determine the strongest ideas.
- **Stay focused on your users.** Tell stories about users to keep them at the center of your attention.
- **Everyone participates.** Everyone has a marker and a pad of sticky notes.
- **Stay engaged.** Avoid side conversations. Use a “parking lot” to capture issues that are off-topic.
- **Start on time, stay on time.** To meet our goals, we need to watch the clock and stick to the plan.
- **Yes, and...** Instead of dismissing the ideas that your teammates suggest, push yourself to build on them.

# Ready, set, go!

## Cognitive Walkthrough

60 min

### IDENTIFY A GOAL

Choose a high level goal for your user to complete during the test.

- **Example goal:** Assign a workstation to a new employee.

### Green Sprouts Client Team Research Plan

Team Name	Green Sprouts
Research plan owner name	Jen R.
Date	07/06/18

#### Research Plan Purpose

State the business purpose

Review proposed self-check flow via prototype before final design recommendations.

#### Research Objectives

Written as statements or questions. Be explicit. What will you test, why, and how (specific methods)? An objective must be singular & measurable.

Objective	Statement/question	Research Method(s)
Objective 1	Users will successfully self-scan unlabeled produce	COGNITIVE WALKTHROUGH
Objective 2	end users + check out staff can troubleshoot read errors together in 60 seconds	COGNITIVE WALKTHROUGH
Objective 3		
Objective 4		
Objective 5		



**IDENTIFY A TASK**

Define the task or tasks that a user would be expected to complete using your prototype or solution to achieve this goal.

- **Example tasks:**

- Locate new employee data
- Associate employee with ID number to work station
- Save changes to new employee data

Objective	Statement/question	Research Method(s)
Objective 1		
Objective 2		
Objective 3		
Objective 4		
Objective 5		

Target users  
don't see the ①  
value of pre-order  
until experiencing  
directly  
---  
user interviews +  
cog walk thru

time + transportation  
are primary ②  
drivers to use  
pre-order  
-----  
some

what blockers ③  
keep users  
from first-time  
use?  
-----  
interviews

### IDENTIFY A SCENARIO

Prompt your user with a scenario framed around your goal and tasks.

- **Example scenario:** You're onboarding a new employee on her first day and need to assign her a workstation.

The form includes sections for:

- Screening Criteria:** Describes users to talk to for each phase of the research plan.
- User Description:** Fields for User Description, Number of users per group, and Additional notes.
- Demographics:** Fields for Age, gender, and ethnicity.
- Timeline:** Outlines the research team members across three phases: Phase 1, Phase 2, and Phase 3.
- Deliverables:** Date interim and final deliverables, and predefined medium.
- SCENARIO:** A section for defining the user scenario.
- Research Plan Purpose:** States the business purpose: "EVALUATE INITIAL DESIGNS TO INFORM FIRST STAGE OF PRE-ORDER APP".
- Research Objectives:** Written as statements or questions. An objective must be singular & measurable.

Objective	Statement/question	Research Method(s)
Objective 1		
Objective 2		
Objective 3		
Objective 4		
Objective 5		

Target users don't see the value of pre-order until experiencing directly  
---  
User interviews + Cog walk thr

time + transportation are primary drivers to use pre-order  
-----  
some

what blockers keep users from first-time use?  
-----  
interviews

### PREPARE YOUR PROTOTYPE

Ensure that your prototype or solution has all the necessary elements for a user to complete the defined goal.

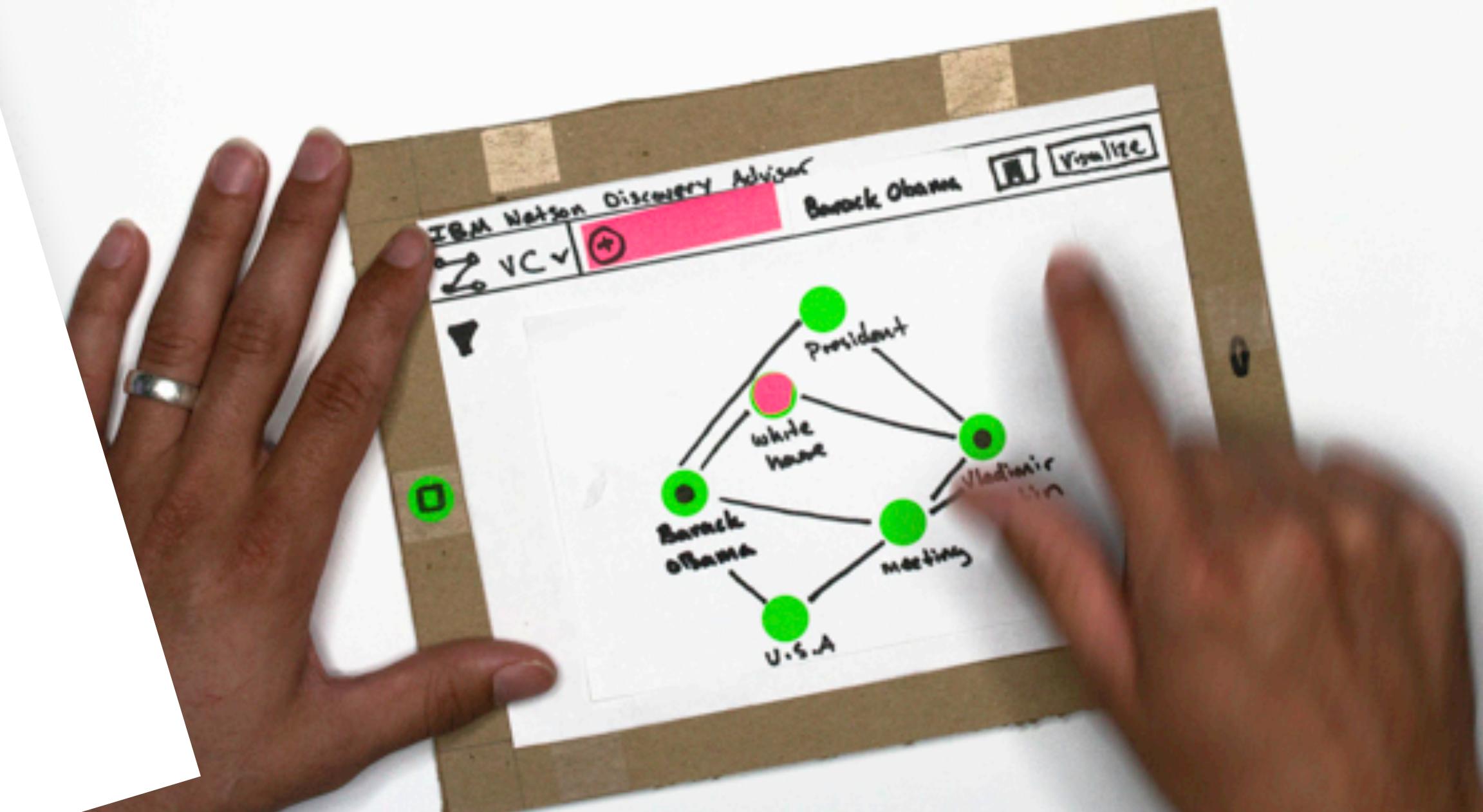


## Cognitive Walkthrough

60 min

### PREPARE YOUR PROTOTYPE

Put your prototype in front of a user and have them walk through the scenario while you silently observe.



Cognitive Walkthrough

60 min

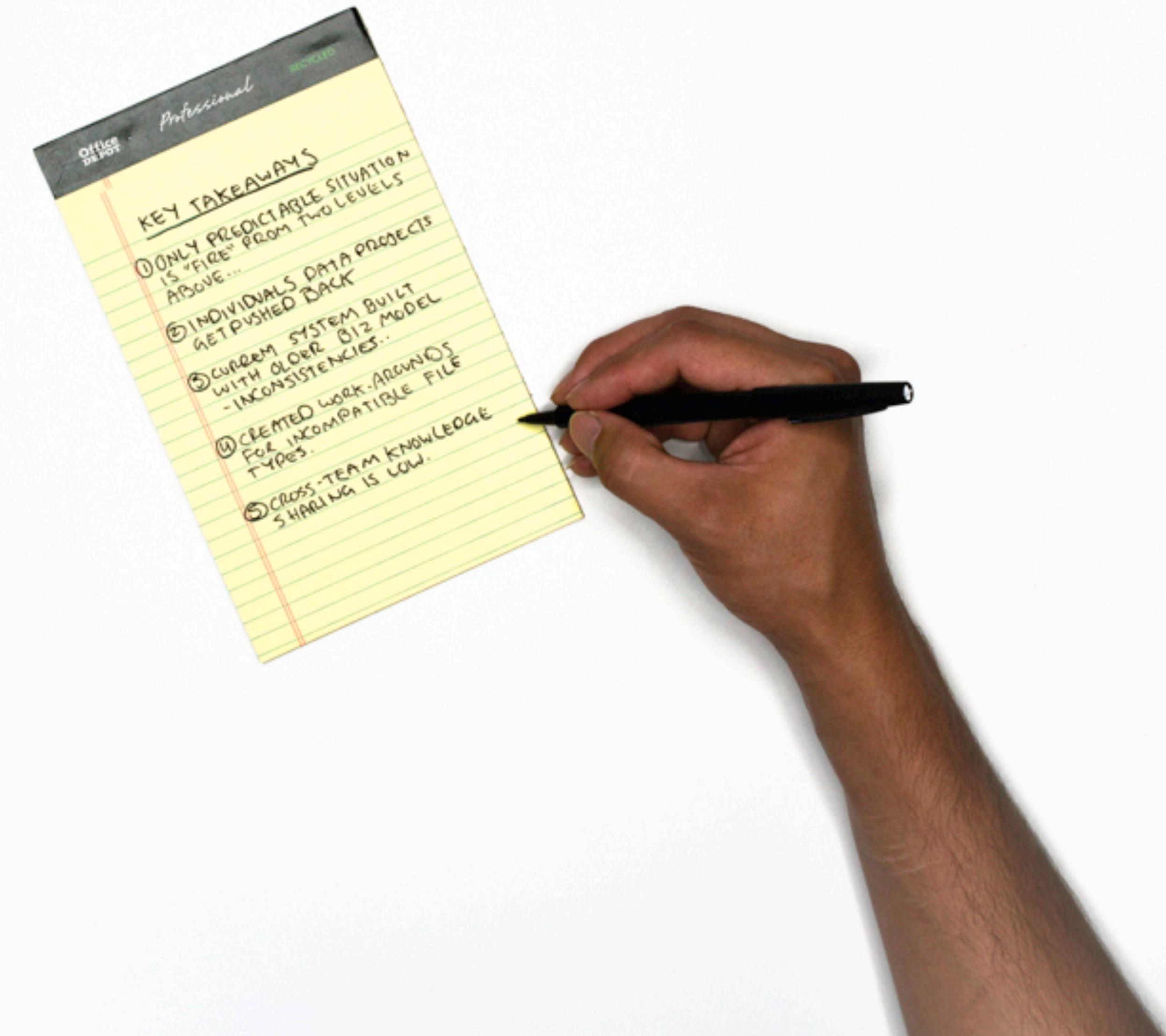
**TEST WITH USERS**

Do not demonstrate  
how to use the  
prototype or solution.



### TEST WITH USERS

Take detailed notes.  
Better yet, bring a  
teammate to help you  
during the test so you  
don't miss anything.



# Cognitive Walkthrough

**60 min**

## **REVIEW AND REFLECT**

Review what you saw users do and what you heard them say during the walkthrough.

## What went well?

# Were they able to achieve the intended outcome?

What part of the prototype or solution needs to change?

Where did they struggle to complete the tasks?

Did they understand the structure of the prototype or solution?

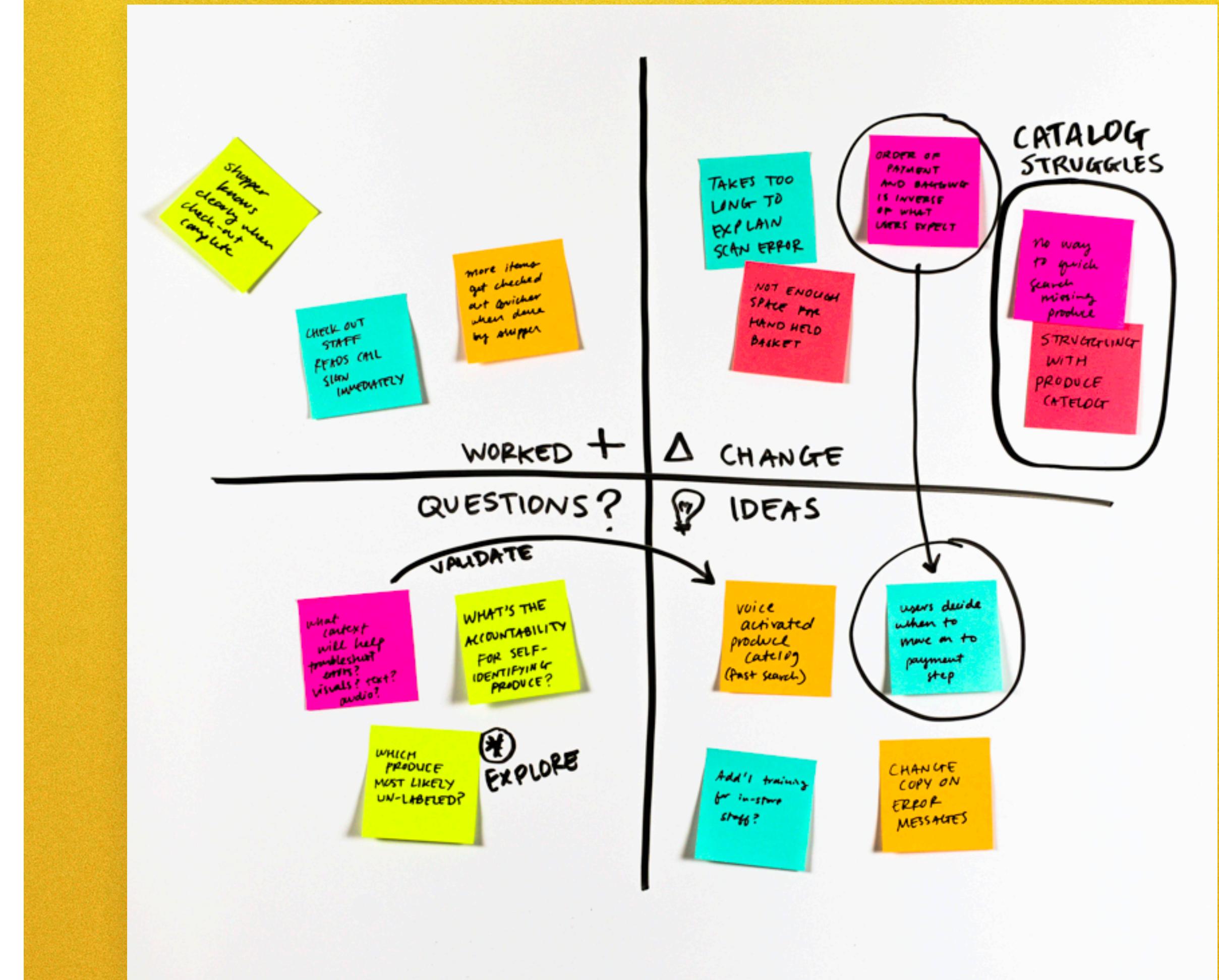


## Cognitive Walkthrough

60 min

### REVIEW AND REFLECT

Use a Feedback Grid to organize your observations.



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