



# Tips and Tricks for Running a Contextual Inquiry Session

## What to say in the introduction

- Thank participant for taking part
- Explain process (again) and emphasize there are no wrong answers
- Assure anonymity – you need to know what they actually do, not what they should do
- Obtain consent and explain that they may withdraw consent at any time
- Outline the focus of your research

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## Taking notes

- Notetaking is important but must not interfere with observation and discussion
- Use a small digital device with a quiet keyboard
- Or pen on paper
- Whatever your chosen method, you must be able to take notes effectively while observing or speaking
- Practice!
- Notes should...
  - Be self-explanatory (free-standing)
  - Focus on a single concept or observation
  - Identify the participants (anonymously)
  - Written in the first person ("I always...")
  - Checked with participant if significantly reworded

## Remember the master-apprentice relationship

- Participants should actively show you how they perform their activity
- Stay in focus –don't be afraid to redirect
- Ask clarifying questions if you don't understand something
- If you cannot observe some tasks directly, ask participant to walk you through them mentally



## Photos

- Take photos (with necessary consent) wherever possible
- Ask participants if you may use photos of them 'in action' anonymously – they make great images for personas
- Also use photo's in sessions with others: interpretation/coding and affinity diagramming, for example

## Artifacts

- Things that get used or created in the process
- Can be real – paper forms, for example
- ...or virtual – on screen
- Take photos or screenshots of all artifacts and refer to them in your notes



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