

Field Research To Direction

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Facilitation Script

Field Research To Direction

Category: Research | Duration: 1 day | Participants: 6-12

Workshop Overview

This workshop takes teams from field observation to actionable insights through a structured journey of contextual research, experience mapping, and evaluative analysis. Participants will learn to conduct research in real environments, document user journeys comprehensively, and identify opportunities for improvement using the Rose, Thorn, Bud framework. This hands-on workshop bridges the gap between observational research and strategic direction-setting.

Workshop Objectives

- Master contextual inquiry techniques for gathering insights in natural environments - Create comprehensive experience diagrams that reveal user journeys and pain points - Apply evaluative frameworks to identify what's working, what's not, and what could be - Transform field research data into actionable design directions - Build skills in observational research and systematic analysis

Learning Outcomes

- Deep understanding of user needs, behaviors, and pain points - Actionable research insights documented and prioritized - Research-backed recommendations for product decisions - Master contextual inquiry techniques for gathering insights in natural environments - Create comprehensive experience diagrams that reveal user journeys and pain points - Apply evaluative frameworks to identify what's working, what's not, and what could be - Transform field research data into actionable design directions - Build skills in observational research and systematic analysis

Materials Required

- **Field Research Kit**: Notebooks, cameras, recording devices, consent forms - **Diagramming Supplies**: Large paper rolls, markers, sticky notes, journey mapping templates - **Analysis Materials**: Rose/Thorn/Bud templates, colored sticky notes (pink, green, yellow) - **Documentation Tools**: Laptops/tablets for digital capture - **Workspace**: Wall space for large diagrams, tables for group work

Pre-Workshop Checklist

- Room setup complete with tables arranged for group work
- All materials prepared and distributed
- Technology tested (projector, slides, timer)
- Participant list and name tags ready
- Refreshments arranged (if applicable)
- Backup activities prepared in case of time adjustments
- Emergency contacts and room information noted

Workshop Agenda

Time	Duration	Activity	Facilitator Notes
9:00 AM	15 min	Activity	Encourage networking. Have refreshments ready.
9:15 AM	75 min	Activity	Overview of contextual inquiry methodology. Prepare questions, observation guides, and ethics proced...
10:30 AM	120 min	Activity	Teams conduct contextual inquiries at designated sites. Observe users in natural environment, docume...
12:30 PM	60 min	Activity	Encourage networking. Have refreshments ready.
1:30 PM	90 min	Activity	Teams organize and synthesize field notes. Identify key insights and patterns from observations....
3:00 PM	120 min	Activity	Create journey maps from contextual inquiry data. Document touchpoints, emotions, and decision point...
5:00 PM	15 min	Activity	Encourage networking. Have refreshments ready.

Facilitation Script

Opening (5-10 minutes)

SAY:

"Welcome everyone to the **Field Research To Direction**. I'm excited to have you here today. Over the next 1 day, we'll be working together to [main objective]."

"Before we begin, let's go around and do quick introductions - your name, role, and one thing you're hoping to take away from today."

Facilitator Tip: Arrive 15-30 minutes early to set up the space and greet early arrivers. This builds rapport and helps participants feel comfortable.

Setting Expectations

SAY:

"Let me share a few ground rules for our time together:

- Every idea is valid - there are no bad ideas in brainstorming
- Build on each other's ideas - use 'Yes, and...' thinking
- Stay present - phones away unless for an emergency
- Timebox discussions - I'll keep us on track
- Have fun - the best ideas come when we're relaxed and engaged

Any questions before we dive in?"

Closing & Next Steps (10-15 minutes)

SAY:

"As we wrap up, let's take a moment to reflect on what we've accomplished today."

"I'd like each person to share one key insight or takeaway from our session."

Facilitator Tip: Capture action items on a flip chart or shared document. Assign owners and due dates for each action item before ending.

Post-Workshop Actions

- Send thank you email with workshop summary within 24 hours
- Share photos of artifacts (sticky notes, sketches, etc.)
- Distribute any promised resources or templates
- Schedule follow-up if needed
- Collect feedback via survey
- Document learnings for future workshops

Troubleshooting Guide

If Participants Are Quiet

- Use round-robin techniques to ensure everyone speaks
- Try silent writing exercises before group discussion
- Break into smaller groups of 2-3 people
- Ask specific individuals for their perspective

If Discussion Goes Off-Track

- Acknowledge the point and park it in a "Parking Lot"
- Redirect: "That's interesting - let's capture that and return to our focus area"
- Reference the agenda and time remaining

If Running Behind Schedule

- Shorten break times (but don't eliminate them)
- Combine related activities
- Move detailed discussions to follow-up sessions
- Be transparent with participants about time constraints

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This script is a guide - adapt it to your audience and context