LUMA-Contextual Inquiry

3 hours

Luma

Contextual inquiry puts you in the user's workspace to watch them do real work and ask questions as it happens, because people often do things differently than they say. You leave with detailed notes on how the work is really done.

H HOW TO RUN

1 Select a location and participants — 20 min

Select a location and participants with the team: one or two users, and pairs of researchers so one can ask while the other takes notes. Say: "We're not here to ask people what they do. We're going to watch them do it and ask about it as it happens."

2 Prepare guiding questions — 30 min

Prepare a short guide of guiding questions tied to what you need to learn, and check the recording equipment and consent forms.

3 Arrive at the workspace — 10 min

Travel to the user's workspace early enough to look around before you start. Plan the journey separately: these minutes start when you arrive.

4 Introduce yourself — 5 min

Introduce yourself and the exercise, and get consent before you record anything. Say: "I'm here to learn how you actually do this work. Please do it exactly as you normally would, and treat me as your apprentice."

5 Start the work — 5 min

Ask the user to work as they normally would, on a real task they'd be doing today.

6 Observe and ask questions — 1 hr

Observe and ask questions during their work, at natural pauses, without stopping the task.

7 Let the user guide the session — 20 min

Let the user guide: ask them to show you the parts of the work you haven't seen yet, and follow where they take you.

8 Record detailed notes — 25 min

Record detailed notes, photos and video of the workspace, then read your key notes back to the user to check you've understood.

9 Thank the participants — 5 min

Thank the participants for their time and tell them what happens next with what you learned.

KEY TIP

Remember to be the apprentice. Ask "why" frequently to understand the reasoning behind actions.

O OBJECTIVES

- Observe users in their natural environment
- Ask questions while they work
- Learn through direct observation
- Reduce reliance on assumptions
- Uncover the real user experience
- Understand the user's context

M MATERIALS

- ☐ Recording equipment (audio or video).
- ☐ Notebook for note-taking.
- ☐ Question guide.
- ☐ Consent forms.
- ☐ Open mind.

P PARTICIPANTS

4 to 8 people

F FACILITATOR NOTES

REMEMBER

- Avoid judgment and stay curious throughout the process. It's easy to fall into the trap of leading the witness, so be aware of that: if you hear yourself ask "Would it help if...?", stop and ask "What are you doing now, and why?" instead.
- If the user starts giving you a tour of how it usually goes, ask them to do the next real task in front of you.
- Remotely, have the user share their screen and do real tasks while you watch on a video call.
- It works for screen-based work, but you lose the desk, the paper and the interruptions, so say so in your findings.