Contextual Inquiry - Practical Guide and Checklist

Getting Started with CI

Contextual Inquiries are a blend of interview and observation. Practitioners will do both aspects during the Contextual Inquiry. You will need a team of 2-3 people with a mix of roles: interviewer, note taker and camera person. Typically having at least one dedicated note taker is recommended. A core team of these people should attend all the contextual inquiries. You can switch other people in and out to expose more people to the contextual inquiry process but there should be at least 2 people who attend all or most of the contextual inquiries.

If team members are not familiar with contextual inquiries provide a practice CI beforehand where the new person practices asking questions and while observing someone. Having still photos or video of the CI session will be helpful for later.

Steps and Best Practices

- Form CI team (at least 2 dedicated people to attend all CIs)
- Roles for team: interviewer, note taker, photographer/second note taker (consider having one dedicated note taker for each CI)
- Allow each dedicated team member to get experience as interviewer
- Conduct a practice CI beforehand for unfamiliar people
- Prepare CI Interview Questions and Areas of Interest for Observation part
  - Faculty Question Guide
  - Student Question Guide
  - TA Question Guide
- Take extra team members along to gain exposure to users (have them be a note taker)
  - Consider taking developers so they can see users in action
- Interviewer should rehearse material so they are familiar enough not to have to refer to notes all the time.
  - Take printed notes as a reference
  - Be comfortable enough with material so you can anticipate novel directions CI may go in
  - Be able to go with a novel direction to gain unexpected insight but try to cover main areas of interest
- Typing notes on a laptop makes it easier afterwards, but only do this if note taker is comfortable and typing won't distract user
- Note takers should keep basic information categories in mind when note taking, but still be able to go with flow of CI
- When photographing computer screen, stand behind and to one side of user. Don't get in the user's face!
- Photograph office/dorm room/desk to capture "environment".
- Photograph artifacts such as: text books, paper notes, calendars, post-it notes, computer file structure, emails, etc. to get complete picture
- Try to conduct the CI in the natural setting of where the user does his/her work. Maybe that's a student's dorm room or library or a professor's office. The real environment and all its distractions is important to understanding the user's goals, tasks and ultimately how the best design will be created.
- After the CI analyze and discuss notes immediately or as soon as possible while it's still fresh to team members.

Remember What to Bring with You!

Before heading off to your contextual inquiry, make sure you have the following.

- Printed copy of protocol (for you to quickly refer to)
- Honorarium for user (if appropriate)
- User consent form and Pen
- **Name of user (best to greet the person without referring to your notes)**
- note taker (EXTREMELY important)
- note taking forms (either electronic or paper)
- camera or video equipment if using
- pens
- extra pad of paper
- folder to put all user's papers and notes in one storage place
- **Directions for where you are meeting user (if going to them)**

During Contextual Inquiry

- Greet user.
- Introduce them to any other observers or note takers.
- Have user sign consent form and give address (if a cheque has to be mailed to them for honorarium)
- Explain contextual inquiry procedure and that you are trying to understand how they do their work not how others do.

- Ask them if they have any questions.
- Have them complete the demographic questionnaire (if using one)
- Ask an ice breaker question about some of the demographic information you want to collect anyway. Want to put user at ease if possible.
- Ask interview type questions first
- Conduct Contextual Inquiry focusing on having users "**show**" you how they do a task instead of just telling you.
- Let them ask any questions and debrief them.
- Let them know how they can find out about user research results and how the results affected any software
- Thank them for participating.
- Give them their honorarium (or let them know when cheque will be mailed and they can expect to receive it). Give them a contact number for someone if the cheque doesn't arrive.

After Contextual Inquiry

- Write "Thank You" email to user(s) for their participation
- Ask them if they know any further people who may be interested in participating (you want to build your user database 😎
- Send them any links to your project if they are interested (can always use new volunteers)
- Analyze your notes as soon as possible
- Write up notes and put into research categories of your CI
- Add photos to notes
- Store notes in a safe location where user's privacy can be maintained
- Create high level summary of user notes and make available to greater team or community - share out results!
    - Instructor High Level Summary template
    - Student High Level Summary template
- Get ready for next CI
- Start to discuss with CI team(s) how you will process and do data modeling after all the CIs are complete.
    - Make sure team members know how data modeling is done and what the "philosophy" is that you are using
    - Provide training where relevant
    - Determine how to meet to do data modeling. Face to face is best.

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