


## TOOL INSTRUCTIONS

# Contextual Observation

Best to print on:

 8.5 "x 11.0"

We tend to operate via surveys or focus groups when trying to understand others. The issue with doing this is that people often don't know how to communicate what they actually do.

Here's a data-collecting tool to help you get a real understanding of someone's job, experience, or challenges. Contextual observation allows you take-in how people behave in their most natural production environment by immersing yourself in their work-flow and behaviors.

## STEPS

1. Before using this tool, plan who, when, and where you will observe. You may already have a fully formed problem statement to direct your domain of observation or it may still be just a fuzzy notion. Regardless, it is important to do some preliminary planning.
2. Print out at least 10 sheets of the Contextual Observation tool and bring them with you to observe your chosen subject (user) - this tool will provide a framework for note-taking.
3. After you meet your user and explain your purpose, begin filling out the 'context' section on the left of the tool and jotting down some initial thoughts about the space and environment you're in.
4. Once the user continues going about his/her usual activities, start to observe your surroundings and the actions and interactions among people happening around you. Write down some notes in the four main sections what the person is doing, saying or feeling.
5. You may feel overwhelmed at first, but don't worry about capturing every piece of possible data. Focus on what the person is doing, listen carefully to them as they interact with others, and be on the lookout for things they say or do that indicate how they might be feeling. This that strike you as particularly important, salient, or even not-so-obvious, jot down.
6. If you are watching your user go through multiple activities, it may be helpful to use separate pages for each activity to keep your notes and raw data organized.

- ① I want to understand a person's behavior and motivations by observing the details in their environment that influence them.
- ② I want to better empathize with them.    ③ I want to improve the experience where it is currently weak and amplify where it is strong.

**CONTEXT**

\_\_\_\_\_

Date

\_\_\_\_\_

Time

\_\_\_\_\_

Location

\_\_\_\_\_

Who is involved?

**SPACE**

What is this person's environment like?  
How do the things and the space itself affect them?

**DOING**

What is this person doing? What situation are they in? Do you notice anything unusual, extraordinary, or unexpected?

**SAYING**

What is this person saying? What are they *really* saying? Notate any striking quotes or phrases that may be helpful later for your own sake or to convey to others what you are observing

**THINKING & FEELING**

What is this person thinking in this situation? What are they feeling? Do they seem overwhelmed, happy, content, etc.? How can you tell?