

Guide to Observing/Shadowing

Observing or shadowing people is about witnessing how they experience your design challenge. Think about it as uncovering the “how”. Here’s what you need to know about observing or shadowing people.

DECIDE WHEN AND WHERE

Based on your exploration plan, select situations, events, environments, or people that you want to observe or shadow in order to learn about your user, system, or to seek inspiration.

Make the necessary arrangements for conducting your observations or shadowing – whether that’s arranging to shadow a colleague through parts of their day, or get permission with a store owner to observe people in a café.

PREPARE OBSERVATION/SHADOWING GUIDES

Describing what you see-- instead of interpreting it-- is the most important thing to keep in mind while observing or shadowing.

We’ve provided some frameworks you can use when you’re observing or shadowing people. You never know what will end up being important, so use the frameworks to collect different kinds of data.

PREP FOR OBSERVATION/SHADOWING

For each observation or shadowing session you’ve planned, it’s best to have 2 people. One person may focus on something completely different than the other. If you intend to take photos or video, you may need a third team member to do this.

OBSERVE OR SHADOW PEOPLE

You’re ready to go out and learn! In design thinking, we call this “going into the field.” Below are a few tips to keep in mind when you’re observing or shadowing people.

After each interview, you should take 15 minutes to write up the key takeaways while they are fresh in your mind. You can use the debrief sheet we’ve provided.

Observing People

You're ready to go out and learn! In design thinking, we call this "going into the field." Below are a few tips for what to think about when you are conducting your interviews. After each interview, you should take 15 minutes to write up the key takeaways while they are fresh in your mind. You can use the debrief sheet we've provided on the next page.

Dos:

- Describe what you're seeing in detail as it's happening, even if you don't know why or what the importance of the observation will be.
- Look for how people may "work around" a particular challenge.
- Try to be as inconspicuous as possible - if shadowing, ask the person to do things as they would if you weren't there.
- Record time periodically throughout note taking to make it easier to revisit events later.
- If you can, title observations as you go - ordering pizza, arrival, waiting in line, etc.
- Observe body language and gestural cues to add context to event (woman looks confused, man peers down an aisle, etc.)
- If you can, snap photos of specific events that represent the experience you're observing.
- Take a few minutes after observing or shadowing to jot down key learnings and thoughts.

Try not to:

- Get overwhelmed with information overload - just take note of what you can
- Think that you aren't seeing anything new - keep with it

How to take observational notes

While you are observing, there will be a lot going on, which can feel overwhelming. Remember that you are just there to capture what is going on - not to layer any interpretation on at this point. To ensure your attention is “evenly hovering” between different aspects of the activities and environment during your observations, you can use the following framework to focus your note-taking:

- **A = Activities** are goal-directed sets of actions. Take note of the specific activities that people are doing.
- **E = Environments** are the spatial elements where activities take place. Take note of how people are using the space, the space’s function in the experience, and the function of the space.
- **I = Interactions** are between a person and someone or something else. Take note of routines - and special interactions between people and/or objects.
- **O = Objects** are building blocks of the environment. Take note of objects that are present - including what are being used and not used in the environment - and how they relate to the activities that are happening.
- **U = Users** are the people who are involved in the activity. Describe who they are, the roles they play, and the relationships they have.

There are a few different ways you can structure your note-taking - you can center your note-taking around activities (A), and describe the subsequent elements (EIOU) that correspond with the activity. Or you can write your notes in a narrative format, while being attentive to all the elements (AEIOU). Refer to the examples below.

Example of a structured form observational note:

6:15pm

Activity:	Paying the bills
Environment:	Kitchen table
Interaction:	Cynthia takes out a pile of opened envelopes from a binder on table Pulls up spreadsheet on her computer titled “Jones_bills_2012” Starts with “Verizon” row, finds Verizon bill & enters total fee Puts bill on right side of computer, making new pile 5 year old daughter, Hayley, asks for ice cream Cynthia finishes up that row, gets up, gets her ice cream & turns on TV When done, calls Mike to let him know they are over the monthly budget
Objects:	Table, binder, opened bill envelopes, chair, cell phone
Users:	Cynthia, Mike, Hayley

Example of a narrative form observational note:

10:05am: Pair of women approach kiosk. Both are deep in conversations. One picks up a hat. Looks at it absent-mindedly. Conversation between them continues. Now both start looking at and showing each other hats. One holds one up. They both look it over. The other nods her head. Women holding hat spins it around in hand. Looks it over several times. Other woman checks watch. 2nd woman hides hat in pile under others. They leave kiosk.

10:45am: Hat women are back. One looks through pile and finds hidden hat. Looks relieved. She heads over to cashier and pays for the hat.

Explore Debrief Sheet

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STUDENT EXPERIENCE LAB

Date:

Type of activity:

Name of participant(s):

Researcher(s):

Main themes or learnings that stood out in this interview:

Things that mattered most to participant(s):

New questions or topics to explore in future interviews:

Things that participant(s) said or did in this interview that surprised you: