

Design Research & Synthesis: Class 4

Researcher Roles & Tools

Thursday, September 15, 2010

Establishing roles is one of the most important parts of preparing for research.

1. Moderator

2. Note-Taker (& Videographer, Still Photographer)

1. Moderator

The moderator is the MC for the research event. They must be personable, comfortable, and attentive. They are responsible for keeping the conversation on track while not making the participant feel rushed or shot down.

The moderator is also responsible for making clients feel involved, and addressing their questions and concerns (no matter how absurd) by smoothly integrating them into the interview.

Research Planning: Roles

“Hi, my name is Lauren. Jon and I are design students, and are working on a research project to help define opportunities for social innovation around (focus area). Would you mind if we learned from how you _____?”

I'm going to be doing ____, ____, ____.

Jon is going to be doing ____, ____, _____. Do you mind if we take pictures? We will only use them amongst each other to help remember what we've learned.

We'll try to stay out of your way and ask questions as they come up. Let us know if we're being pesky.

Sometimes, we'll ask questions that seem obvious. We promise we aren't making fun, we're genuinely curious and want to learn from you as much as possible.

Keys to Moderation:

- Establish yourself as the key communicator by introducing yourself and your partner. Keeping yourself as the primary point of communication will make the participant become more comfortable with you.
- Build rapport with the participant by hamming it up for the first few minutes - ask some introductory questions, describe the purpose of the study, get them to sign the informed consent form, make neutral smalltalk.
- Do not be afraid of silence
- Never, never-ever-ever interrupt the participant when they are talking or doing something critical to their job.

Keys to Moderation:

-Ask open-ended questions:

“What are you doing...”

“Why are you doing ...”

“Can you tell me about...”

-Let the conversation take a tangent if it is interesting, especially if the participant is passionate about it (but reel them back in the interest of time)

-Pay attention to communication that is non-verbal

-Summarize at the end of each topic - this will help to make sure you understood the participant and will also help the note-taker to not miss anything important

-ALWAYS ask “why” (even if you know why). Data is useless if we don’t understand the meaning behind it and can’t semantically define it per the user

Keys to Moderation:

A good moderator will let the participant lead the conversation; a great moderator will make the participant think they are leading, while the moderator gently guides the conversation.

2. Note Taker

The note taker is the single person responsible for capturing what happens in the research. This means taking notes of what is happening and what people are saying as well as taking photographs and/or video and audio.

The note taker needs to be able to listen to the conversation happening while also observing what is happening.

The integrity of the note taker's data will ultimately determine the richness of the insights developed during analysis and synthesis. (No pressure)

Keys to Note Taking:

- Remember to always document a full data point (what is happening/being said and why)
- If you missed something, wait until there's a break and ask the moderator or participant to repeat themselves
- Pay attention to the moderator. They may want you to pay extra attention to something happening and have to tell you in a very subtle way
- If you have questions you think were missed by the moderator, wait until the conversation is moving forward to ask
- Do as much coding and annotation to your notes as you can during the interview without being distracted

Keys to Note Taking:

- Try to capture as much in quotes as possible. Capturing natural language is a valuable research asset
- Do your best not to paraphrase - you'll probably forget what it means the next day
- Clearly differentiate your assumptions from what the participant is actually doing or saying
- If you feel comfortable, take your notes in their final destination (word, xls, whatever). It will make your life easier later
- If you have materials or activities happening in the research, it's primarily your job to get those set up while the moderator keeps the participant company

Research insights are in the “essence” of the data -
learning about the “what” to understand the “why”

Patterns > Novelty.

Participants are guaranteed to do things in ways that are novel or interesting, and we may feel compelled to solve for these instances.

However, our goal is to find similar behavior and patterns across the people we learn from.

Why is this important?

so that our solutions are holistic and well-grounded.

Tools help us manage data so we can see patterns emerge across participants.

The tool used is less important than what the tool does.

Using basic tools like Transcripts or worksheets can make your post-research data management much easier.

Since you will not be handling massive amounts of data for your contextual inquiry, you are not required to use tools like Excel to manage your data. We will use it later in the class.

Research Planning: Tools

		Sheets	Charts	SmartArt Graphics	WordArt	
◇	Name	Capture Cells		Code 1	Code 2	Quote
45	Rob Stokes	wants places to put things (like overhead racks) so wife could secure baby and stow stuff	ideal	Interior		
46	Rob Stokes	wants a place to "lock in " the baby seat or the kid	ideal	Interior		
47	Rob Stokes	ideal system - "this is where I want to go" and it takes me there. There are no routes, it goes directly there.	ideal	Route		
48	Rob Stokes	more of a family room type atmosphere, with maybe wifi - our own comfortable pod.	ideal	Interior	Q	
49	Rob Stokes	Seeing things pass by that I've never seen, without me having to do anything."	ideal	Route		
50	Rob Stokes	I want to go on this for the sake of going on it - it's fun, like going on trains.	ideal	Perception		
51	Joe McCann	uses an electric scooter (takes 4 minutes), except on days when it's raining uses car to go	Bike	Route		
52	Joe McCann	used to use the bus - realized it took longer to walk to the bus stop and wait than to just walk to work, would walk a few minutes then wait 7-10 min for bus	CapMetro	Schedule		
53	Joe McCann	lives .9 miles from frog	General Commute	Route		
54	Joe McCann	has a car that he never drives - girlfriend drives it a lot. Driven it to work a few times, but doesn't have a need to bc has to pay for parking	Car	Rates		

talk about each column and why it's important; coding usually happens after the research, unless certain things are already determined (e.g. in usability testing, or when there are specific exercises).

The composition of a data point:

what is happening:

nurse dries the tool a second time before putting it in the sterilizer.

why it is happening:

because if she doesn't she thinks the machine will shut down and not sterilize the instrument.

essence of why it's happening:

she is worried that the machine won't work and that could create a negative effect on her day and her perceived performance.

Research Planning: The Composition of a Data Point

Bad data point

423 Rob Lifford NYC transit maps have always been good. Train wayfinding

Research Planning: The Composition of a Data Point

423	Rob Lifford	NYC transit maps have always been good.	Train	wayfinding
530	Gregg	while at the bus stop, would see other buses go by and want to know "where does the 1L go?" to see if he could catch a different bus	CapMetro	Wayfinding

Good data point

Why is this a good data point?

Research Planning: The Composition of a Data Point

Also a bad data point.

424 Rob Lifford

. I lived in Korea, and the Sol subway map was very similar. Color coded lines worked well. They (Korea) had a good system of intercity busses and good rates. The timing was always pretty good.

Train

wayfinding

You can never be overly prepared.

Organize your equipment:

- Video/audio recording
- Tapes
- Batteries (and backup batteries)
- Pens/paper
- Digital camera

Organize your discussion guide:

Try to anticipate the flow of the inquiry, but be open to following the direction the work takes you

Regrouping immediately after research is key.

Go somewhere as a team and document key things you learned, or anything you want to discuss.

Due 9/22

Assignment 3: Contextual Inquiry footage

- Raw video from your contextual inquiry
- Raw notes from your contextual inquiry
- Post on AC4D blog reflecting on your contextual inquiry