



# ***Discovering User Needs: Field Techniques You Can Use***

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**Create successful designs by understanding your users**

A one-day workshop given by:



**Kate Gomoll and Ellen Story**

**Gomoll Research & Design, Inc.**

**Milwaukee, WI**

**414.319.1057**

**[www.gomolldesign.com](http://www.gomolldesign.com)**

**[info@gomolldesign.com](mailto:info@gomolldesign.com)**

# Discovering User Needs: Field Techniques You Can Use



A workshop for interface and product designers, usability specialists, software engineers, web and application developers, researchers, product marketers, product managers, and project leaders.

What do your users really need? What drives them to your web site or product? What keeps them coming back? How can you make sure they are getting the most out of your design?

We've found one tool that's invaluable for answering these questions: *Field Studies*. By going into the field, observing and interviewing users in their own environments, then analyzing the data, we come back with an incredibly rich understanding of what users really need.

Field study techniques work so well that most of the major trade magazines, *The Wall Street Journal*, *USA Today*, and *The New York Times* have had in-depth articles describing companies that have used these techniques to gain a significant competitive advantage. The articles all say the same thing: designers who do field studies end up with great products and web sites!

In this workshop, by conducting your own real field visit, you'll learn all about field studies, including how to plan them, what to look for, and how to analyze the data. The instructors will teach you how to observe users and collect key information to feed directly into your design.

Specific techniques you'll learn include:

- selecting the right users.
- cataloging tasks that will become the basis of your design's functionality.
- developing forms and surveys to collect data efficiently and easily.

- observing users' work without influencing it.
- interviewing users to understand where they are coming from.
- avoiding common problems by using simple tricks and techniques.

This full-day workshop is an in-depth exploration of how to plan and conduct a field study, how to do a detailed task analysis, and how to conduct contextual interviews. It includes creative ideas for collecting and using data, as well as tips for planning and conducting the visits. Throughout the workshop, participants will have the opportunity to ask questions, discuss their own methods, and exchange experiences.

The class will be divided into teams of 4-9 people. Each team will perform its own field study at a pre-arranged location. (The field study sites are generally within or near the conference center.) Teams will use a disposable Polaroid camera and their own study materials to collect data. Teams will plan a field study, gather data, and analyze data. The workshop stresses active participation; more than 50% of the class time will be spent in discussion and exercises.

This workshop was given at the Usability Professionals' Association 1996, 1998, 1999, 2002, and 2003 conferences. It has also been taught at Jared Spool's User Interface conferences from 1998-2001, the CHI 2002 and 2003 conferences and at the Studio 2001 conference. This workshop was the highest-rated workshop at each of the UPA and User Interface conferences where it was taught.

The workshop format is well honed and highly successful. We also teach this workshop at customer sites, personalizing the field exercises to meet the customer's needs.

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# Workshop Agenda

## Introduction and overview

During the introduction and overview, participants will describe their experience conducting field studies and what they hope to learn in the class. Then, the instructors will discuss the following topics:

- Where field research fits in the user-centered design process.
- Why field research is important.
- Terminology.
- A process and a philosophy.

## Determining appropriate participant groups

This section stresses the importance of customer profiles. Participants will learn how to describe their user base and target particular groups of users for potential field visits. There will be time for participants to exchange information on useful techniques. Topics covered in this section include:

- Determining the proper participant mix.
- Locating + collecting demographic info.
- Working with customer lists.
- Using outside market research firms.
- Developing surveys and screeners.

## Planning and conducting a field study

This section covers the basics of planning, setting up, and running a field study.

- Planning and set-up.
- Day-in-the-life studies.
- Observing + interviewing users in context.
- Targeting the most important tasks.

## Exercise: Developing materials

Participants will work with their team members to develop field study forms and surveys to use for their field study exercise. The exercise field study site will be pre-arranged, and the team members will have a contact name for at least one person at the site they are visiting. The workshop instructors will circulate through the room, assisting teams with their planning.

## Exercise: Field study

Teams will conduct their field study exercise during an extended lunch period. Team members will decide how to divide study roles and activities.

## Analyzing the data

This section focuses on how to use the data collected during field studies. Participants will learn how to analyze data as a team. Sample diagrams, charts, and storyboards will be used to illustrate techniques. Topics covered in this section include:

- Slicing and dicing the data.
- Developing profiles and personas.
- Isolating usage patterns.
- Analyzing key tasks.
- Creating process storyboards.
- Developing user data posters.

## Exercise: Producing deliverables

Teams will produce as many deliverables as possible during the 45-minute exercise period. Instructors will suggest appropriate deliverables and assist teams as needed.

## Exercise: Team presentations

There will be approximately 45 minutes available for team presentations. The instructors will determine the length and format of presentations, depending on how many people are enrolled in the workshop.

## Fitting it in

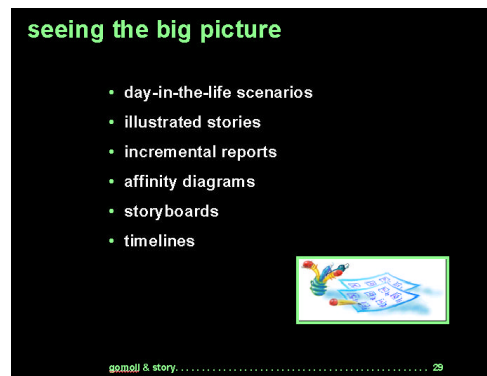
This section is a presentation of useful ideas for making the field research process work for your organization. The presentation will be followed by a group discussion. Topics covered in this section include:

- Modifying your schedule.
- Convincing management.
- Encouraging process change.

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## Workshop Materials

During the lecture portions of the workshop, we project bulleted slides summarizing the points we are discussing. When appropriate, we project a second set of slides showing examples related to the discussion topic. Students are given detailed notes, as well as a printed copy of the slides. They can choose to follow either format. If they choose to follow the detailed notes, there are slide icons in the notes corresponding to the projected slide being discussed. Shown in the right column is a lecture slide and the corresponding note page is below:



### Seeing the big picture

The “big picture” has to do with gathering the team’s impressions of what the user’s world is like and capturing the major flow of the work, above the task level. Some useful tools for eliciting and documenting the big picture are day-in-the-life descriptions, affinity diagrams, and storyboards. You need not use all of these tools every time, but you should try each technique at some point.

- **Day-in-the-life scenarios**

We mentioned day-in-the-life descriptions earlier, back in the “Identifying the work” stage. Such a description captures your impressions of the user’s world in a narrative form, covering everything from responsibilities, to attitudes, to problems, to use of technology, to the physical environment. You could have each team member produce a day-in-the-life description and share them as a way to introduce the team’s impressions from the site visits.

- **Illustrated stories**

Writing a story about a field visit is a good way to “get it all out” when you return to the office. This quick “brain dump” method may end up being one of your most valuable deliverables from the process. If you can tell an interesting story about the people you visit, you can remember what they did, how they felt, what they liked and disliked. If you add photographs to the stories, you will have compelling documents that people will want to read.

- **Incremental reports**

After each site visit, consider writing an illustrated story and distributing it via e-mail. This will give everyone who is interested in the progress of the study a chance to see how things are going. It will also give people a preview of the kind of information you are collecting. Of course, the incremental reporting is also a good way for you to make sure you deal with the data while it is still fresh in your mind.

- **Affinity diagrams**

Creating an affinity diagram is a group activity in which members of the team generate sticky notes containing discrete observations and group like notes — ones that share an “affinity” — on a white-board or wall.

The goal is to collect many individual observations and then to give order to them. An example note might be, “Jane often chooses not to refresh the data on her screen because she doesn’t like to wait.” That note might find its way into a category called “Performance Problems.”

One way to speed this process is to anticipate the categories that you are interested in. For example, you might know that you are interested in “Reasons for accessing the documentation.” You could put that category on the board, before you start the session, or you might even have asked team members to mark this category in their notes as they observed in the field.

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## About the Instructors

Kate Gomoll and Ellen Story teach this workshop collaboratively. They use a tag team approach, splitting the lecture time almost equally. Both instructors help students with the exercises.



**Kate Gomoll**

Kate Gomoll is the founder of Gomoll Research & Design, a consulting firm specializing in user experience design. She is currently working at GE Medical Systems.

Kate is a nationally recognized pioneer in the field of user interface design and usability. The company has conducted customer research for a broad range of clients, including: Charles Schwab, Compaq, DirecTV, Hewlett-Packard, GE Medical Systems, Onyx Software, Netscape, Unext (Cardean University), and MSN TV. Kate's user observation guidelines have appeared in *The Art of Human Computer Interface Design* and *The Macintosh Human Interface Guidelines*.

Kate teaches customer research methods at conferences and workshops worldwide. For seven years, she taught field study methods as part of a 3-day workshop for UCLA Extension. She also taught this workshop at the User Interface '98, '99, '2000, and 2001 conferences, as well as at the UPA '96, '98, '99, and 2002 conferences, the CHI 2002 and 2003 conferences, and the Studio 2001 design conference.

Kate has a BA in Psychology from the University of Wisconsin and an interdisciplinary MA in Professional Writing from Carnegie Mellon University in Pittsburgh, PA.



**Ellen Story**

Ellen Story has worked in the field of software development and design since 1985. While working at Northwestern Mutual Life, she was one of the first to practice usability engineering at the company. She became a user interface design specialist, a new specialty for the company, and in that capacity she educated teams on the user-centered design process and principles of good design.

Ellen later joined Metavante Corporation in the role of human interface designer where she conducted research at user sites, created human interface models, developed detailed window designs, and participated in usability testing for financial services software.

Since joining Gomoll Research & Design, Ellen has helped numerous clients — such as iMagicTV, Charles Schwab, Compaq Corporation, Bio-Rad Laboratories, and The Blood Center of Southeastern Wisconsin — with research, interface design, prototyping, and usability testing. She has presented at the Usability Professionals' Association annual conference, the User Interface conferences, the CHI annual conference and has taught numerous workshops on interface design and usability at client sites.

## Workshop Pricing & Details

<i>Pricing</i>	<ul style="list-style-type: none"><li>➤ \$600 per person for the first 12 (minimum of 12 participants)</li><li>➤ \$550 for each additional person</li><li>➤ Travel expenses, outside the Milwaukee metropolitan area</li></ul>
<i>Materials and facilities provided by customer</i>	<ul style="list-style-type: none"><li>• Room accommodating total number of students.</li><li>• Tables arranged for groups of 4-5 students each.</li><li>• Color projection equipment for PowerPoint presentation.</li><li>• VHS tape player with projection capabilities.</li><li>• 5 flip chart easels with paper and markers.</li><li>• One package of 8.5" x 11" paper.</li><li>• Other supplies depending upon workshop.</li></ul>
<i>Materials supplied by Gomoll Research &amp; Design</i>	<ul style="list-style-type: none"><li>• Course notes and binder.</li><li>• Printed copies of lecture slides.</li><li>• Sample deliverables.</li><li>• Materials for exercises. (Post-it notes, pens, scissors, masking tape, etc.)</li><li>• Lecture presentation on a laptop PC.</li><li>• Other supplies as necessary.</li></ul>
<i>Cancellation and rescheduling policy</i>	<p>No charge is made for the course if the customer cancels more than 30 days prior to the first day of the workshop. If the course is canceled less than 14 days prior to the first day of the workshop and the course is not rescheduled, the customer must pay a \$3,000 cancellation fee. If the customer reschedules the class less than 14 days prior to the original date, a 10% penalty fee will be added to the cost of the rescheduled class.</p> <p>If the instructors must cancel the class, all efforts will be made to reschedule the class in as timely a fashion as possible. If the class cannot be rescheduled because of instructor conflict, no fees are due.</p>
<i>References</i>	<p>Courses have been taught for organizations such as Stanford University, UCLA Extension, Best Buy, Eli Lilly &amp; Company, Metavante Corporation, Northwestern Mutual Financial Services, Lawrence Livermore Laboratories, and at usability and design conferences nationwide, including CHI 2003 and UPA 2003.</p>

