

Limina Fact Sheet

Contextual Inquiry

Description

Contextual inquiry is a critical first step in a product design process. This research method is structured to understand users, their environment and their activity patterns. At Limina, we use a variety of techniques designed to uncover your users' needs and to build a clear and concise view of their goals, use habits, and environment.



To be truly effective, we emphasize the need to conduct these interviews with users in their "natural" environment to allow for an accurate representation of their day-to-day interaction with the product, or in some cases, a competitor's. Limina's user experience analysts conduct contextual interviews with users regarding their methods, styles, habits, and motivations, based on the following principles:

1. **Context:** Gathering information in the context of a user's environment enables UX Analysts to observe ongoing experience rather than summary experience, and concrete data rather than abstract data
2. **Partnership:** Unlike the traditional interviewing model, contextual inquiry uses an apprenticeship model, where the user is the expert. The UX Analyst's role is to help individuals articulate their work experience
3. **Interpretation:** It is not enough to only collect raw data on users and their activities. During field interviews, UX Analysts find the underlying intent of users' actions so that systems can be designed to meet needs that they may not be able to articulate
4. **Focus:** Time for field interviews is limited; UX Analysts must concentrate field interviews on the aspects of users' behaviors and activities that are crucial to system design

This methodology reveals usage patterns that users themselves may not be aware of – Limina translates user's tacit knowledge and behavior into explicit knowledge and design requirements.

Methodology

Project kickoff & Discovery

Prior to the kickoff meeting, the Limina team creates a preliminary user typology that identifies several key attributes and characteristics of the user population. This is used to determine both the number of users and number of groups that will participate in the contextual interviews. Throughout the project, the user typology is updated to reflect the findings of the contextual research.

During the first week of the project the Limina and Client teams will meet to review the project proposal, review/refine the preliminary user typology, and discuss the interview process (number of groups, locations, and types of interviews).

Conduct Interviews

Limina works with the client during kick off and discovery to determine the methods of interviews including, but not limited to, contextual interviews, user diaries, phone, and surveys. The goal of conducting interviews is to explore the activities, environment, interactions, and objects of the users' jobs against the following criteria:

1. **Activities:** Activities are the actual tasks each user performs during a given time period. Activities can be physical (leading a staff meeting) or cognitive (reviewing financial reports). They can be solitary (reading industry journals) or communal (discussing industry trends with colleagues). They may also be stationary or mobile
2. **Environment:** The environment is the physical space in which the user plays or works. This may be any space from an office, a boardroom, conference center, home office, to a mobile setting. Each type of space has specific characteristics that enable or disable the user from successfully accomplishing their activities
3. **Interactions:** Interactions are the communications and information transactions that are integral to the users' tasks. This interaction can take many forms, including email, phone calls, person-to-person conversations, bulletin boards, faxes, and instant messages/ chat
4. **Objects:** Objects are the physical items that are used to complete the user's tasks. Features such as Internet access, bandwidth, monitor resolution, default browsers, and software packages are taken into consideration. Artifacts, which are things that the user creates or modifies, are also examined. Examples of artifacts include article review forms, post-it notes with often-dialed phone numbers, and marked-up articles
5. **Users:** The user is central to the entire contextual analysis approach. The user's experience level with computers and certain applications, as well as their preferences in how they access information are important considerations. Since characteristics of the user affect the way they think, work, and interact, it is essential to investigate the user's behavior and incorporate this information into the design of the system

Analyze and Present Findings

Based on the information gathered during the interview phase, Limina will analyze the data from the various forms of interviews using a variety of techniques. The findings from the interviews will be analyzed using five distinct models that will organize structured qualitative data in the form of visual representations as well as detailed user requirements.

Deliverables

A contextual analysis report covering:

1. List of participants
2. User typology including interaction, environment, artifacts, and activities
3. A written report of data collection, findings and recommendations, detailed workflows and work models; including a description of the methodology (ies) used to derive them
4. High level interaction model concepts
5. Materials created for and from interviews, including recordings, notes, etc