



Tips and Tricks for Running a Contextual Inquiry Session

Contextual inquiry is a user research method that mixes interviews with observations. They are an excellent way to gain insight into people's work processes, daily routines, how they use different products, and so on. When you run a contextual inquiry session, you have to remember to do a lot of things at once, and it can be chaotic. You can use this template as a cheat sheet for what you need to remember during your contextual inquiry sessions.

What to say in the introduction

- Thank participant for taking part
- Explain process (again) and emphasize there are no wrong answers
- Assure anonymity – you need to know what they actually do, not what they should do
- Obtain consent and explain that they may withdraw consent at any time
- Outline the focus of your research

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Taking notes

- Notetaking is important but must not interfere with observation and discussion
- Use a small digital device with a quiet keyboard
- Or pen on paper
- Whatever your chosen method, you must be able to take notes effectively while observing or speaking
- Practice!
- Notes should...
 - Be self-explanatory (free-standing)
 - Focus on a single concept or observation
 - Identify the participants (anonymously)
 - Written in the first person ("I always...")
 - Checked with participant if significantly reworded

Remember the master-apprentice relationship

- Participants should actively show you how they perform their activity
- Stay in focus –don't be afraid to redirect
- Ask clarifying questions if you don't understand something
- If you cannot observe some tasks directly, ask participant to walk you through them mentally

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Photos

- Take photos (with necessary consent) wherever possible
- Ask participants if you may use photos of them 'in action' anonymously – they make great images for personas
- Also use photo's in sessions with others: interpretation/coding and affinity diagramming, for example

Artifacts

- Things that get used or created in the process
- Can be real – paper forms, for example
- ...or virtual – on screen
- Take photos or screenshots of all artifacts and refer to them in your notes



Do you want to learn more?

Learn how to use this template to your best advantage in our online course [User Research – Methods and Best Practices](#). Sign up for it today and learn how you can gain and apply user insights through qualitative research if you haven't already started the course.

User Research – Methods and Best Practices

■□□ Beginner course

User experience (UX) design requires you to understand the pains and pleasures of your users—and user research is the way in which to do just that. In that sense, it's actually the largest part of the field... meaning it's essential for you to have the relevant skills and knowledge if you want to be competing with the best. In our course [User Research – Methods and Best Practices](#), you'll learn the best practices for getting first-hand knowledge of your users, thus enabling you to design the optimal product—one that's truly relevant for your users and, subsequently, outperforms your competitors'. In the course you'll be equipped with templates that will give you pointers on how to effectively interview your users, conduct observations, and best present your findings to stakeholders. You've already downloaded one template, now take the next step and master the full range of user research techniques!

[Learn more about this course >](#)



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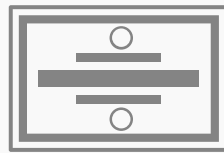
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