Field Studies: The Ultimate Tool in Your Usability Toolbox – A Discussion with Kate Gomoll

Jared Spool: Hello, welcome everybody to the follow up podcast to the Virtual Seminar on Field Studies. I have on the phone here Kate Gomoll from Gomoll Research & Design. Hi, Kate!

Kate Gomoll: Hi, Jared!

Jared: For those of you who attended our Virtual Seminar on March 20th, a lot of you asked some really great questions and so we've taken the opportunity here to schedule a little bit of time to answer some of the ones we couldn't get to during the session.

So, I'm just going to just jump right in here. Jorge had asked, "In the process of redesigning a website, when should we start doing Field Studies? Should we do them at the first draft of the redesign, or is it something we do a little later?"

Kate: Well, ideally, you really want to start before the first drafts of the redesign, if possible. We found that with redesigns in particular, doing a combination Field Study/Usability testing is a great idea and tends to work pretty well, especially if you haven't done usability testing of a recent version of the website.

So, we try to combine the two, but you should know that it's really never too late to do Field Research. You can always roll the results into a later version, or even if you're halfway into the process it's not too late so don't think that if you haven't started yet and you're into the process that you've missed the boat.

Jared: Is there any sort of information that you get from a Field Study that you should potentially wait on before acting on? Have you ever run into a situation where it was like, "Well, if we'd done this earlier we could have acted on it but we should probably wait at this point?"

Kate: Sure. I think sometimes you do find that, especially if the implications are really big and they're going to require a major rework and you don't have that much time in your development process and you just need to get the product out the door.

So you might find that the results from your Field Research suggesting something really different and you might need to schedule more follow up research to confirm that and also possibly a longer development process to make such a big change, for example.

Jared: OK. Kurt wanted to know, 'Is the idea that you want to have more studies, you know, the more studies the better, or is there a point where you've just saturated and you're just doing too much? '

Kate: Well, I think really the best approach is to have an ongoing Field Study program if possible, where you're just doing Field Studies all the time and continually feeding the results back into your product. I mean that's the ideal situation.

But, if just you're doing just a single study, and you want to set it up as a fairly large scale study, because you think you're going to need to do lots of visits, I suggest that you perform a phased approach. Do the minimal first, then have an analysis period where you can look and see, 'Am I seeing enough patterns in my results that I feel comfortable with this and I don't need the second phase? ' Then, you can say, 'Ok, we're not going to move to phase two.' But it's better to err on the side of budgeting and scheduling for the full study and have the option of stopping if you're starting to see enough patterns in your results, and that you have enough confidence that you feel like you know what to do with the product as a result.

Jared: OK. Someone once told me that the point you know when to stop is when you hit the point of least astonishment.

Kate: [laughing] Well, that's true, yeah that's true. You're starting to see so much repetition it's as if we've seen this a million times. We know what to do now. [laughs]

Jared: Exactly, exactly. At that point when you're no longer surprised by anything you see. I've got to tell you, in all the studies I've ever done, I've never reached that point.

Kate: [laughing] Yeah, I think it's pretty hard to reach that point.

Jared: But we can. Maybe someday I'll go out there and everything I see I'll have seen at some point before. Of course, just having seen it before doesn't mean I'll have remembered it and integrated what I had seen.

Kate: Exactly.

Jared: I guess we have to go beyond the point of least astonishment. John wanted to know if there were any good tips for note taking, which I think is a great question. That's one of the things I struggle with. I sit there with my little notepad and I don't bring a computer because you do not always have the advantage of being able to sit down comfortably.

Kate: That's true.

Jared: So I just have a little notepad but it feels clumsy to me.

Kate: Yeah, we found that if we can make up a script for ourselves with the questions that we want to ask, we probably won't ask them in the order we have our script. But if we make this script up and we put lots of white space between the questions so we have lots of room to write, and then we leave the backs of the pages blank, that really helps, and we staple it all together so you can easily shuffle among the pages, and then you have lots of scribble room.

We found that that works really well. Another thing that we've been doing on recent visits is a colleague of mine had been audio recording the visits, and then he started out trying to transcribe them himself but then he got wise and decided to send them off to a transcriber to transcribe those, the whole interview or observation, at least what was said.

And, we found that that's been extremely helpful to fill in the gaps of things you weren't able to get down in your own personal notes and to really make sure you're covering everything.

Jared: The transcriptions are a great idea. We use a service that's inexpensive, called CastingWords.com.

Kate: Oh.

Jared: [spells] C-A-S-T-I-N-G-W-O-R-D-S-DOT-COM. We use that for transcribing our podcasts and other things and it's very cool. It uses the Amazon Mechanical Turk, which means they break it up into little pieces and they have people all over the world transcribing little bits.

And they do it really fast and it's very inexpensive. The half and hour is usually under 20 dollars.

Kate: Oh, that's great to know. I will tell my client.

Jared: Yeah.

Kate: Thank you.

Jared: When you have your little packet of paper, what do you use for a writing surface? I always feel intimidated bringing a clipboard.

Kate: Oh yeah, I don't usually bring a clipboard, that's a good question. I guess I usually bring a fairly solid file folder and usually I have so many materials, I have interviews put in there for all the other participants if I'm seeing more than one on a day so that makes it pretty solid.

So it's just a regular old file folder's not very intimidating looking.

Jared: No, no, that's a great idea. What about for your notations? Do you have a way of noting certain things? Do you have a little set of code words? What do you focus on when you're taking notes? Do you have any tricks for that?

Kate: Well I don't have any necessarily great - I don't do shorthand or anything, I don't have any really great tips except that I do a lot of circling of things, I try to make key points, I write in phrases rather than full sentences.

Another technique that I learned from a colleague of mine, Barry Glassford, that I use, is to take a blank page and just draw a line down the center, and on the left hand of the page write down things that I'm observing or hearing directly from the participant. And on the right side go my interpretations or my personal comments on those things.

So it's a nice way to separate your observations and the hard data from your own interpretations.

Jared: That's really good because it's one of the things we talk about a lot is separating out your observations from your inferences.

Kate: Yeah.

Jared: And making sure you're not inferring things, and if you're doing, like we have a study coming up where we're visiting 16 sites in three weeks and I know at the end of those sites I'm going to look back at my notes and I'm not going to remember which were hard observations and which things were inferences.

Kate: Yeah, so just finding some way to separate those is great.

Jared: That's really quite clever. [Kate laughs] Thanks, Barry. [both laugh] I'm going to get this name wrong, I'm going to guess it's pronounced Sudakhar. He, and I'm going to guess it's a he, [laughs], this is one of the problems of my cultural ignorance. Yeah, well if it's not in Boston it doesn't exist as far as I'm concerned.

But Sudakhar, our friend Sudakhar, who I'm hopefully will apologize to for any mangling I've done of either his name or gender, he wanted to know what tools or software you use for analyzing the data, or he also was interested in videos.

Kate: Sure, we don't really use any very fancy tools. We make Excel, we tend to come up with what we call 'Tick Sheets', it's really just taking participants and putting them along one axis, and taking whatever you're trying to track, be it a problem, an observation, a user need - those kinds of things go down the other axis. And then we just start marking, who had that need, who exhibited that problem, who had that frustration for example.

And then you start, and that quickly shows you where the patterns are starting to develop. So we use those tick sheets in lots of ways.

Let's see, what else do we do. When we're analyzing video of course, we'll use video editing software for trying to pull out key clips. And then we make great use of highlighter pens and post-it's when we're looking at the physical data. When we do affinity diagramming for example, which is basically just taking key observations and doing groupings, we'll use post-it notes for that.

On-line we use the change tracking tools in Word for example, to do highlighting, for other people to make notes, to just pretty much make the patterns visible, that's really what we're trying to do.

Jared: Cool. We get this 'what do you use to analyze your data?' question a lot, and it's really hard to know what to do to analyze the data until you have the data at hand.

Kate: Exactly.

Jared: Because in my experience the data sort of dictates how you analyze it. One of the hardest things to do is to budget time for analyzing stuff at the beginning of the project, because you don't know what that's going to require.

Kate: Right. And one of the tricks we've used is to try to think up front, even when we're designing the study and figuring out what materials to produce, what are the deliverables we hope will come out of the study

So for example, if you know that you are going to try and develop personas, then there are certain kinds of data you're going to want to collect about the users. Maybe you're looking for certain kinds of behavior that you're going to want to track.

And so that kind of helps you figure out 'Well, what am I looking for so that I can produce the persona?' If you wanted to produce a list of user needs for example you're going to be wanting to track user needs, and so you want to find ways that you can highlight user needs in your results and come up with these lists.

So think about the deliverables, and what it is that's going to come out of the results, and that helps your figure out how you should analyze it and what things you should be highlighting.

Jared: Yeah. I think that that's interesting, because I will actually start making notes as I'm collecting the data that says 'Oh, we should look at this.' So my analyzing plan sort of evolves while I'm sitting with the participants.

Kate: Yeah, me too. And sometimes you find out that that's also a good point; with Field Research you can modify your data collection tools as you go. Because that does happen, you'll be on site with a participant and you'll realize 'Oh, I just thought of a great question I'm going to ask' or 'an observation I'm going to make, I want to make sure I do that with everybody else.' And so then you might change your materials when you get back to make sure you ask that question or make that observation.

Which means that sometimes you'll also need to then call back the people that you observed earlier and ask them those questions, or you might need to do some follow up observations. But that's a good point Jared, that happens all the time.

Jared: Right, yeah. I mean, one of the things that we do - I don't know if you do this - is we actually schedule that time into the project.

Kate: Yeah.

Jared: We put two hours between every two to four visits, to go back and revisit our questions and materials and update them and see if we want to change the direction of the study, or any of those things.

And so for instance when we're doing the sixteen part study coming up, we're going to have four of those sessions with the team to review what we've seen so far and figure out what we want to do going forward.

Kate: Yes, that's a really good practice, I highly recommend it. And that helps also with what we were talking about earlier, phased approach, where you can say 'OK, well what are we seeing?' 'How close are we to feeling like we have enough?' and 'How much more do we need to do?'

Jared: Cool. Carlos had an interesting question about, his specific question was for Web Re-Design, 'Do you use additional tools to support your observations?' In a given period of time, you know, like Google Analytics, or tracking, or log analyzers. I guess the bigger question is do you treat Field Studies in isolation, or do you think of them as a piece of a larger integrated research plan? And how are some of the ways you've packaged those together?

Kate: I definitely think Field Research is part of the larger plan, and all those things supplement each other. My point with Field Research is to just make sure that you don't use those tools like the analytics and the logging and the tracking in isolation, without ever seeing anybody in context.

I think they all fit together. And planning for them to fit together and be integrated is going to give you the best and truest picture of how people are using your product or website.

Jared: Right. I'm wondering though, when you're talking to your clients or when you're putting together you projects, are you definitively in a Field Study phase, and that's all you're thinking about during that piece and then you move on to something else?

Kate: Oh, no.

Jared: Or do your projects always have this sort of very integrated discussion going on?

Kate: Well we try to make sure that we have an integrated discussion going on, certainly. I think that's the best approach. And if you can find out and know what other activities are happening at the same time, or could be happening, in parallel, just to fill out this bigger picture, that's the best approach.

And so we do try to find out, OK, have done any usability testing? Are you collecting these logs? Are you doing the analytics? And, how can we all communicate and work together as we develop this bigger picture?

Jared: Right, right. We had a project recently, it wasn't a Field Studies project, we were doing usability testing. We noticed in the usability test that every time people went to sign in to the system, they would forget what password, and more importantly in many cases what email address they had used to create their user name under. Because people change their email addresses and sometimes they don't use the system for several years.

Kate: Right.

Jared: And what was interesting, was that we saw a whole bunch of people in our study going to the 'forgot you password' page. And so that made us ask the question 'Gee, I wonder how many people do that?' So we went back and looked at the logs for the previous couple of days on the site, and found out that a third of all people who went to log-in went to the 'forgot your password' page.

Kate: Wow.

Jared: And then we further on saw that many of them requested the email to log-in, and then - It took us a little longer to figure this out -we found out that only about ten percent of those inevitably logged-in from that email.

And we were realizing that that log-in process was causing people to leave, and we wouldn't have known to look for that until we saw it in the study.

Kate: Yes, and that's great. So the study helped you figure out how to look at the data in logs.

Jared: Exactly.

Kate: And how to make use of that. So then that log data became a really great back-up of your findings in the Field Research.

Jared: It really did, and we learned that people were really put off by having to log-in to this particular site. Because much of the information they were looking for, there wasn't any need to be protected. It was information that had they called the 800-number and not given any personal information, the person would have gladly told them.

Kate: Right. Very good example. I think you need to look it as, these are all pieces of the bigger puzzle. The more pieces we can work with together the better our picture of the big puzzle is going to be.

Jared: That's right. So, Kristina asked if you had any tips about how to put participants at ease when they're being videotaped or photographed. My guess is, putting a parrot on their shoulder and making them wear an eye patch is not the way.

[laughter]

Kate: No, not the best idea. Well, I guess the best thing to do is, we always try to discuss it ahead of time, and we explain why we need to take video, how we're going to use the video or photograph, and then the kinds of things we're trying to capture. I mean, letting them know that their face is not really the focus, that usually when we're taking video we're really looking at the screen, we're looking at their environment. Getting their face in there is really incidental, so that they know that's not the primary reason, that we're not taking video to put up and show millions of people, that it's for research purposes to help us find patterns in the data. So, really trying to help them understand why we're taking the video or the photograph.

Then, when you get out into the field and you're actually doing this, setting up the video, we found that having a helper along is a great idea. If you have somebody who can unobtrusively set up the video in the background while the interviewer talks to the person and gets them relaxed before you start videotaping, that helps. And if you can set the video up so that it's over their shoulder, not directly in their face--sometimes that's not possible. If it's a webcam, but webcams tend to be a little less obtrusive anyway because they're so small.

For photographs, we try to ease them into the photographs as well. We don't come in snapping pictures immediately. And we ask permission before we take a picture. We start off with more environmental pictures like, "Oh, could I take a picture of your work area?" or "How about this piece of paper, is it OK to take a picture of this?" Then, we'll show them the photographs on a digital camera so that they can say, "Oh, yeah. That's fine. You can have that."

Sometimes we do want to have a face shot of the person, but we'll save that until later after they've gotten used to us, they understand what we're doing, they're more comfortable. And a lot of times we'll take that face shot at the very end.

Jared: Do you do things like try to avoid using the flash?

Kate: Yes. That's a really good idea, and especially you want to avoid it if you're taking pictures of the screen. It doesn't work with a flash anyway, but that's a great idea, try not to use the flash if you're in an environment where it'll work.

Jared: Do you try to use a tripod? Or do you try to avoid a tripod?

Kate: We do use a tripod usually if we can, if it works in the environment. So, some environments where you're getting up and walking around a lot, it's not going to work. But in a cubicle, if you can get enough distance, a tripod is nice because you can set it up and leave it alone, and then the participant kind of forgets about it. Especially if you can set it back a little ways.

Jared: That's true. We actually found one of these little one foot-tall tripods. They're not even one foot, they're like inches.

Kate: Oh, yeah, I've used these before too. And you can put them on a desktop.

Jared: You can put them on a desktop, and the one we have has like a Velcro strap so you can Velcro it to the side of a cube.

Kate: That's really nice.

Jared: It's very cool.

Kate: Yeah, the full-sized tripods do get in the way of a cubicle.

Jared: They do, and they're onerous and they're clumsy, and I think they're a little off-putting.

Kate: They are, but you also don't want to just have a camera in your hand and be zooming and panning and make the person feel like they're on a TV show. You don't want to get in their face with it.

Jared: Right. The camera we've been using is actually a picture camera. It's the Canon Sure Shot, the one I have is an SD630. It's a beautiful little camera, it's got a really big screen. But it has a movie mode that actually takes really good movies.

Kate: That's good, and you can get a long enough time so that you can get running?

Jared: Well, I don't typically run it for the whole interview. I typically switch between photo and video in our stuff. I video particular things when I think a sequence is going to be interesting. Of course every so often you go, "Doh, I wish I had video that."

Kate: Right, that's the catch, trying to find those things that you really are going to want. Sometimes you have somebody replay it. "Can you do that again so I can get it on tape?" But, yes, that's a good point. If you can get your equipment to be as small as possible, that's really helpful. It's a lot less intimidating.

Jared: Well, the beauty of this thing is it fits in your pocket. It makes very good videos, the audio is really good. It's very unassuming, and the participant doesn't know when you're switching between video and camera, so it's not really in-your-face.

Kate: And if you've already gotten permission for that, then you don't really have to announce it every time.

Jared: Exactly. And we can still show them at the end and say, "Hey can we keep this". We can do either right in front of them. We use a 2GB card which will hold quite a bit of stuff.

Kate: That's great.

Jared: It works out really well. Now, I have another question related to this, because you mentioned bringing along a person. I often bring along members of the team, in most cases these are their first Field Study things. I often use giving them tasks, like give one person a camera and telling them what I want them to capture, as a way to give them something to do. I have found that particularly for people doing their first visits, they're not sure what they're supposed to be doing there.

Kate: Right, so they're uncomfortable. You're right, I do that too, give them a task that's useful to you, taking video, taking photographs, observing particular things and making observations. It keeps them busy, makes them comfortable, gives them something to do, and it also keeps them from interfering with the progress of the study too, which can be important.

Jared: That's right. There's nothing worse than being in a situation and not knowing what you're supposed to be doing there and just feeling like a third wheel.

Kate: Right. At one, even if you're equipment is very small, there usually is enough to carry and enough to do, because you want to capture as much as you possibly can in this short period of time, that it is helpful to have another person there.

Jared: Let's see here, what do we have. Adam wanted to know, you had mentioned during the seminar that sometimes when you're out in the field you conduct a field-based usability test, so you'll switch out of the mode where you're observing whatever it is that they want to show you--to some extent, that's not quite right, whatever it is that you want to see them show you. But it's not so much a usability but an interview or observation of their regular work.

But then maybe you'll bring up a prototype or you'll have them use a particular system that you're interested in. What's the logistics of that? First, do you make an explicit change in how you're doing things, do you then sit next to them like you would if you were facilitating a usability test? Is there an explicit thing that you do to say, "OK, now we're going to do something different here"?

Kate: That's a good question. I do pretty much let it flow, but I try to do the true Field Research activities where you're really watching what they naturally do. I do those things earlier on before I do the more guided thing, "Now I want to see how you do this particular task, because we're trying to get everybody to do this task." I save that till later in the study because having them do specific tasks might influence their behavior.

So, we do try to make some sort of a break, but it doesn't have to seem like an explicit break to the participant. We really sit wherever is most comfortable. We don't go away and try to make it feel like a lab setting. Where we leave and go into another cube and have them start to do their work. We are always close by so you know, the first part may be more like typical shadowing. Sometimes it is more of an active sort of visit, where you are physically following them around. Then for the second part you might have them sit down and actually have them go through some sort of specific tasks.

Jared: OK, are these tasks you have often prepared in advance, or do you find that you will be sitting there and you will see them do something and say gee, I wonder how they will be able to do this task? Then you will sort of create a usability test spontaneously.

Kate: Yeah, well, that is part of having them do tasks that they would normally do. Or if they have done the task rankings, and they have said these are my most frequent and important tasks. I consider that a normal part of the Field Study process. To say OK, you said this one is really frequent or this one is really important. Can you show me how you do that? That is part of the Field Study process, but often times I do have a set of tasks. That is more similar to a usability test, where I have you know, three or four tasks that I want to get everybody to do.

Even if it is not something that they do frequently, or have said is important, because I just want to see how they would approach that task that is more like a typical usability test. So, it does kind of flow together, but I would say that, especially with website redesigns. I have found that I do want to have at least a few tasks that I ask everybody to do.

The rest are more free form and depend upon what the participant would do naturally or has told me is most frequent or important.

Jared: These tasks, are they sort of made up context like we would do in the lab or are you using elements of their actual work?

Kate: I use elements of their actual work. So you will get those early questions out first about, you know what are there typical activities and what are there goals. Then you try to weave there true goals into the usability tasks.

Jared: If they don't have any particular work, you know let's say the task you are interested in is entering a new customer into the system, but they don't have a new customer to enter into the system. Do you have them sort of fake it, or do you have them, for instance reenter the last customer that they had to enter?

Kate: You can go either way. Yeah, I mean ideally I think you would want to do the most natural thing. You know, make it real if you can, but then if there just isn't a real situation, you should have some prepared. So you can run it more like a typical usability test, where you give them the data and have them do it.

Jared: OK, Stan asked about, you had talked about in the session tag team interviewing.

Kate: Yes.

Jared: That was something he was unfamiliar and frankly I am 100 percent sure what you were referring to, can you talk about that in more detail and how that works?

Kate: Sure, this works best if you have a colleague that has done quite a bit of this kind of work, is skilled in interviewing and observing, and you feel comfortable. If you are lucky enough to have a fellow researcher to go out with.

What we do is we split it up. So basically one researcher will ask a question, and be listing to the response, and making observations based on that question. While the second researcher is also listing to the response, and thinking about, OK based on this response or this observation. I am going to look through the interview script and my opportunities for observation and think about, what would be the most logical next question to ask.

Because often times, your interview script, you know you try to set it up in a logical way but it might not flow as well as it could. So you want to be able to skip around. Having that second researcher there, to be able to pick out the next best question and then ask it. Then is gives time for the first researcher to go again. Look through, now listing to this response or watching this observation. What would be the next logical thing to do?

It just helps make the interview and the observation flow more naturally. So it doesn't feel canned, and it doesn't feel like an interrogation. Then you also you know, you get.

Jared: So, you are not doing good cop bad cop then.

Kate: No, no [laughs] it is really more to help it flow better. You know, you still get all the questions asked, and all the observations made, but it is just going in a more natural order.

Jared: Oh OK, see that is not what I imagined at all. I imagined something that involved you know, masks and coming in from the ropes.

Kate: [laughs] It is not that fancy.

Jared: I am thinking of some other tag team thing I think. Cindy had a great question. She wanted basically to know about, how you bring back what you learned to, not just the team members, but also to the various stakeholders. In such a way that you can show the value of what you are learning. There is some stuff you bring back because you need to make changes, you are going to try to get that stuff integrated into the design, but do you do something special in the process to show the executive team and others why this is so valuable and why you need to do more of this?

Kate: Yeah, we are actually thinking about that all the time. I mean from the very first visit that we go on. Where we write up those incremental reports and start sending those around. We are immediately trying to make sure that we keep the key stakeholders involved, and understanding that we are making progress. Then if you have the luxury of being able to reserve a conference room, for example, or have a space that is your own. Or maybe, it is just your own cube walls.

We start to post things from our Field Research. Just as kind of reminders to ourselves, but also teasers. So that when people come by our area or our offices, and they see these things, they start to ask questions. Then we use that as an opportunity to give an impromptu little presentation about the results and how they are coming along. Then we will also schedule time, as are really starting to pull the results together, and we are beginning to analyze it. We will schedule time for people to come and help us with that analysis process.

So for example you can set up exercises where maybe, you have collected a whole bunch of user needs, and you want to have people help you prioritize those user needs. You could invite users back in to help you prioritize. Then you could also have a session with key stakeholders to help you start brainstorming. Once you have prioritized those needs and you have said OK, these are the key needs that we want to work toward solving, let's have some brainstorming sessions about how we could start solving those needs the, or meeting those needs.

Then we talk quite a bit about this in the presentation but having deliverables that can be used in lots of ways. Having all those one pagers that you can use, you know for like a two minute presentation, of saying oh, these are the top 10 most important or frequent tasks. Let's take a look at these. Let's post them around us, and make sure that we use this list as best we can to spend our design time and do our usability testing, that sort of thing.

I also recommend that you to take all of work results. To all of your one-pagers, all of your reports, your analysis, as you develop it and put it some place central. Give access to people to get to that. So, on your company Internet or maybe you have a shared server. Organize it and put it out there. Always give links to that in your presentations. Send email and let people know that they can go there at any time and take a look at how the research is shaking out, and what recommendations are you start in to make.

Another thing you can do is start a discussion group on that site or on that Internet area, or a blog. So that people can start reacting to the data that you are coming back with, that opens up the community even larger to take and use the data. So we found that is kind of a fun way to keep people involved.

Jared: Yeah, we are actually, for this project that we are doing we are putting together a wiki.

Kate: Oh, great yeah.

Jared: So we are the interim reports that come out of each visit. The sort of first instance reports, we are going to put those as we go. We are going to use the Wiki for; you know various project ideas and discussions. The neat thing about wikis is that you can sort of link back and forth, so if you have a particular theme that emerges, from the individual pages, you can link to that theme page that discusses the theme you're seeing. Then you can link back to the individual observations.

Kate: That's great. That gets people who aren't even centralized, who maybe couldn't get together in a regular meeting, to be able to be involved.

Jared: Yeah, with this particular project, we've got basically three different organizations. We've got us and our client, and we convinced our client (they were actually going to wait) to hire the design team before we started our studies.

Kate: That's good.

Jared: So, they could come on the studies with us, but they're a completely different organization. We've got three different organizations that we're trying to communicate between, so we're using these tools to do that.

Kate: And that helps people feel ownership over the data, too, if they can have a part in commenting on it, coming up with ideas, and brainstorming with it.

Jared: You mentioned securing wall space, like in a conference room or...

Kate: Yeah.

Jared: One of our clients did something absolutely brilliant. They secured the wall space outside the women's and men's restrooms.

Kate: Oh, we did that! I did that too, yeah! Yeah, it's perfect. I did that when I was working at G.E. It was this big, blank wall.

Jared: No one ever decorates it. People decorate the stalls of the restrooms, but that's not what we were thinking.

Kate: I know. It's a great idea. If there is wall space...

Jared: You get a lot of good traffic.

Kate: Yeah! Everybody comes by, and if you're out there putting stuff on the walls, people start asking questions, and it's a great opportunity.

We did that at the first building I was in at G.E. We put it on the walls and we had these big "before" and "after" storyboards on the walls. Then we moved and we went down a floor, and we took the stuff off the walls and put it down on the next floor, because we wanted it to be close to us.

We got all these complaints from the people on the floor above: "Why did you take that away! We were using that!"

[laughter]

So they actually started having meetings of their own around it, annotating and discussing what we'd put up on the wall.

Jared: That's excellent. That's excellent. OK. Time for one more question here.

Nicole had a great question, which is, "In our studies of people in their work environment, we ran into issues with management approval during work hours. Have you dealt with approvals in corporate environments?"

Kate: Yes, we have. In corporate environments especially, you do need to make sure that you come in at the right level. Make sure that you set the visits up with management.

A good way to make sure that you see the people that you really want to see is to talk to those higher level managers initially. Then flatter them, in the sense that, yes, you do want to get information from them.

Then set up an interview with those managers or supervisors to ask them those questions about goals, how they measure success, what they hope to get out of the product, and those sorts of things.

Then have them find the participants for you, and really, really stress how important it is for you to see the end users and get a chance to visit with the people actually doing the work.

Explain to them, clearly, that what they can tell you is different from actually seeing people doing the day-to-day work. You need to be able to see those work-arounds, you need to see how people deal with exceptions, and what happens when they get interrupted, for example. You really want to see what's around them.

So, taking the time with the management to explain why you're there, why it's valuable, and why it's important for them to allow you to do this, definitely important.

Now, sometimes the situation is that you're going in and observing people in a work environment, but you might not be interested in the managers responses. You're only interested in end users.

Certainly, there have been cases where the work happens in the work environment, but it's not officially related to that business. So, we've found that, maybe we need to come at the end of the day, post-work hours. We'll set that up so we don't interrupt the day-to-day business.

You really need to look at the political situation, what's the result of you coming in, and make sure you thoroughly get approval from the management.

Jared: Have you run into this issue? We've run into this several times, where they so want to impress you that they actually set up demos?

Kate: Yes. [laughing]

Jared: They don't do their real work. They do this sort of fake, imaginary work, which isn't what we want at all.

Kate: Yeah, I have had that situation. A big red flag is if they want to take you into a conference room, rather than let you watch them at their desk. So, you need to explain..

Jared: I've worked at companies where everything happened in the conference room, because no one ever had time to work. There were always meetings.

Kate: Yeah. [laughing]

Jared: But, yeah. You're right. We have to stress: "We don't want you to do anything special."

We had a site visit, a long time ago, where we successfully stressed, "We don't want anybody to do anything special. We want to see what you normally do."

It was a large corporation and we came on site with a team of six people. We split into groups of two, and each team of two went off to see a different person work.

Kate: Yeah.

Jared: One of the teams ended up going to see this guy, they were assigned to this person who said, "You really want to watch me do what I normally do?"

We said yeah, so the guy reached into his desk and pulled out the paper and just started to read it.

Kate: [laughs] "That's what I do!"

Jared: That's what he's been doing. It turns out that he was a developer and they were using a version of Lotus Notes. It was at a bank, and the bank was heavy into compliance, not only compliance from government regulations, but from every license agreement they'd had.

The bank had literally read the Lotus Notes developer's license, where it said that you could only use one copy of it at a time. Some other group was using it that day, so he didn't have anything to do.

Kate: Oh, my gosh.

Jared: He had to wait until they were done.

Kate: Oh, how funny.

Jared: That's what the rules said. The funny thing is that we ended up talking to the folks at Lotus, and they said, "Oh, the end user license is how we make the money. We actually give the developer's licenses away. We don't care if they use more than one."

It turned out that they did a little research and found out that the lawyer had accidentally copied that clause from the end user license into the developer's license.

Kate: Oh, my gosh.

Jared: No one had really looked at it, because, actually, nobody thought anybody read those things. The bank did, because they were in hyper-compliance mode.

Kate: [laughs] So isn't it great, that you asked him to really do what he normally does? You would never have come up with that. Never.

Jared: Exactly. We would never have found the problem with the licenses.

In fact, what we subsequently found was that other people felt guilty that they were sharing these tools, when Lotus, in fact wanted everybody to share. The more developers who worked on this, the more apps were built, and the more apps that were built, the more end user licenses they'd sell.

Kate: Wow. Great example. So, yes. You do want to observe what people really do and take the time to ask those questions. Then you do have other things that you can have them do, if you're stuck and you just have all this blank time.

You had, probably, other questions prepared or other things that you could ask him to do.

Jared: There were. One of the observers took him very seriously and asked him what stories in the paper he was reading.

Kate: [laughs] And did any of them have anything to do with his work?

Jared: No, it didn't. We quickly realized this was not an area we wanted to explore further.

Kate: Oh, interesting.

Jared: [laughs] I remember distinctly, one of the developers saying, "So are you looking for technical information?" It was the Boston Globe!

"No, I'm looking for the Celtics scores."

Kate: That's great.

Jared: So, OK. That pretty much answers all the questions we had. This has been really, really, quite fun.

Kate: Great! I've enjoyed it. Thank you.

Jared: Excellent. Well, if you happened to miss the original Virtual Seminar, it's available on the UIE site, uie.com. You can sign up and get a license for your group. We'll be clear about our license: you can share it with all the people in your organization.

Kate: [laughs]

Jared: So, you can go and do that. Even if you saw the live one and you want to go back and have the archive for your folks, you can get that.

So, thank you very much, Kate. This has been a lot of fun.

Kate: Thanks, Jared.

Jared: OK. That's it for today.