Tips for Planning, Conducting, and Reviewing Contextual Inquiries

A contextual inquiry is a user research method combining observation and interviewing of users in their work environment. The aim is to gain insight into a user's work goals and tasks and the findings can greatly influence a user-centered system design. With some key steps and tools, a researcher can uncover rich qualitative data through contextual inquiry.

I have conducted three contextual inquiries with Coordinated Legal Education Advice and Referral (CLEAR) attorneys to understand their daily goals and tasks at the Northwest Justice Project (NJP). One of the first SharePoint site areas to be developed and tested is the Dashboard for CLEAR attorneys, so getting to know these users was a high priority. Reflecting on the inquiries I've completed so far and reviewing *About Face 2.0* by Alan Cooper and Robert Reimann, specifically their chapter on qualitative research, has helped me develop this list of tips for conducting contextual inquiries:

Provide quick, key points in first contact with potential interviewees. As mentioned previously, speaking to CLEAR attorneys was important because they will be the primary users of the CLEAR Dashboard. In individual, brief emails to the attorneys suggested to me by my supervisors, I included the following:

- Self-introduction
- How I was referred to them
- Purpose for interview and observation
- Why their feedback is important
- Length of interview and observation (30-60 minutes)
- Offer to work around their availability to meet

All the attorneys responded with willingness to participate. I'm lucky in that many individuals at NJP are already aware of the SharePoint project and eager to help. Still, when recruiting for any research project I believe keeping the first contact email personalized and brief with information about who you are, the purposes of your study, and your availability helps participants feel more comfortable with agreeing to participate.

Develop open-ended types of questions and keep the interview semi-structured. The list of

contextual inquiry interview questions I had on hand were designed to help me understand the interviewee's goals, priorities, and processes. Each question was open-ended so the interviewee would do most of the talking. Although I had a set of questions prepared, I also wanted to keep the interview semi-structured. My pre-determined questions helped me focus on the types of information I wanted to learn, but the inquiry structure was flexible so other questions could be generated through conversation and observations.

Take notes during the contextual inquiry. I always had a pen and notepad in each of the contextual inquiries. I kept note of the interviewee's answers to questions, process steps, and other observations that could inform design, such as how their email folders were organized. I also jotted down direct quotes from the interviewee. User research results can often be presented as just numbers and diagrams, so direct quotes help add a human element to the data. If the interviewee gives you permission to tape the inquiry, using an audio recorder during the meeting is useful so you can re-listen to information missed while taking notes.

Sort and review notes at earliest opportunity. I immediately started to organize and type up my notes after my first contextual inquiry. They were a mess on the page, but because the inquiry was still fresh in my mind I could easily understand what I had written like abbreviations and process steps. As I filtered through my notes, I realized I was generating a template for organizing the major contextual inquiry components that could be used for my future notes. The template also helps those on the project team who were not at the inquiries to easily navigate my notes.

By incorporating these strategies in practice, I have been able to develop and refine my use of contextual inquiries and continue to discover the value of this powerful research method. I hope these tips prove helpful when leading your own contextual inquiries.

Note: The newest edition of *About Face* is *About Face 3: The Essentials of Interaction Design*.

Contextual Inquiry Template 1
Contextual questions