

# Observation Guide

## Qualitative Research Techniques



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# Observation Guide

## What is Ethnography?

Observation is a key part of the ethnographer's toolkit. Ethnographic research is the best way to learn about your users' needs and goals. Observing users in their environment can help you learn very different kinds of information about the job to be done than that collected in usability labs or through interviews and surveys.

*'First rule of Usability? Don't listen to users -observe'. Jakob Nielsen*

## Guidance on undertaking observations

Observations allow you to observe needs without having to rely on the input and opinions of others who may be steeped in legacy practices, orthodoxies and processes in that area. Taking a fresh look at any job to be done is an important source of insights (the power of the "beginner's mindset").

As a general principle, anyone involved in designing a solution must see and understand how the current solution and processes work. Because only then, can they address intangible frustrations, identifying unarticulated external elements that hinder they job been done well, in addition to the more obvious functional issues. When undertaking observational research, your role is to listen and learn what is involved in actually doing a job in order to understand why things don't work as expected; these observed needs and insights equip you with the knowledge to create better solutions for people, profit and our planet.

There are many ways to carry out structured or unstructured observation activities, but the key is your ability to observe and note what works and what fails to work well and try to understand why.

Observational Research should be supported by other forms of research, examples of which will include exploratory interviews, focus groups, surveys and secondary research to probe deeper into the 'whys'. This is called triangulation, where evidence from other sources supports and builds your confidence in an observation. EBN Lab reflects that confidence in its approach to assigning Evidence Scores to each crafted Need Statement.

## Observation Preparation

If you or your team are undertaking observational activities, it's important to consider the following: <sup>-1</sup>

- **Undertake research on the project area before undertaking observation activities so you are as familiar as possible before undertaking an observation to maximise the value to be gained.**
- **Broaden the scope of your observation** as wide as possible and include all preparation steps around the job-to-be-done and post activities as you may decide it is important to address some of these issues in your solution.
- **Identify who are your key stakeholders you need to engage with.** In addition to the main user or operator, there may also be a number of other key stakeholders that could provide valuable insights as part of this observation activity or in follow up interviews.
- **The objective is to undertake a number of observations.** To observe a pattern emerging you need to observe a minimum of 5 observations of the same job-to-be-done carried out by different users.<sup>2</sup>
- **Plan your visit.** Talk with your contact who is arranging the observation opportunity, find out where you can stand and observe from. Be aware of observation etiquette in the environment in question – for example, do not lean against any equipment or surfaces, do not put anything down – be aware that you may be asked to leave if the person being observed is not comfortable.
- **Be clear about observation “etiquette”.** Ask for detailed guidance on things like how to dress or if there's anything you may need to bring. Find out if it's OK to ask questions during or after the observation session. Be aware if things don't go to plan more than likely the person being observed may not want to converse with you.
  - If you get a chance to ask direct questions, use your notes to clarify anything you didn't understand or why certain things happened. This can include the who, what, when, where, why and how of what you observed and if this was typical.
- **Get a notebook.** For observations, you may only be allowed a notebook. It's a good idea to sketch the layout of the room and the position and movement of people. Capture any short notes on what you hear in relation to user types, equipment required, etc. Also, include notes on who was in the room/location and who had to do what and why. Doodles and keywords are often better at prompting your brain to remember over written text. Keep timelines on various steps of the job to be done.

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<sup>1</sup> [Biodesign Guide – Biodesign \(stanford.edu\)](#)

<sup>2</sup> Jacob Nielsen - [Why You Only Need to Test with 5 Users \(nngroup.com\)](#)

Alternative activities:

- **Consider virtual shadowing as an option.** Where you can't observe in person, explore the opportunity of virtual observation – such as via cameras (with appropriate permission).
- **Contact some Key Opinion Leaders (KOLs) in your selected area of focus.** Get KOLs to walk you through a procedure and learn by mapping out each of the steps involved and who does what. You can do this in parallel with undertaking secondary research on the job-to-be-done and reviewing available videos of the job being undertaken.

## Prompts to good observation:

Gather observed needs right across the broadest scope of the job-to-be-done, including:-

### About the job-to-be-done:

- Identification that this 'job' needs to be done, identification of the preparation activities prior to the job-to-be-done starting as well as any post job-to-be-done activities. Identification of who is involved in undertaking the job-to-be-done.
- Additional considerations may include:-
  - health and safety
  - cleanliness
  - speed
  - maintenance
  - workflow
- How many steps are in the process and time taken. Note each of these steps and who it was carried out by. How many tasks and what actions were undertaken by each of the users involved.
- Question or count the number of times the 'job-to-be-done' is undertaken each day. How many of these are not completed? What are the consequences involved and for whom? What are the implications for them and others? What are the knock-on effects?
- Look for what is missing that you would have expected to see or done in a different sequence than expected.
- Observe any unspoken issues and actions they take when completing a job which surprises you.
- Look out for the inclusion or exclusion of various process steps, habits, actions, and routines. This may be formed by years of regular practice, which potentially could be eliminated.

- Post (follow up) 'job' events – check who is responsible for these and what are their issues, challenges, and complications – especially if not done or only partially done?
- Look for clues regarding cost, number of people and time involved in each step or main stage of the job.

### **Things that work well**

- What works well? These may be worth maintaining or building on in any new solutions.

### **Things that don't work well**

- All obstacles at any of the steps or stages of the job-to-be-done (human, physical, administration, technical, environment, other).
- Technical barriers, which occur daily, weekly or monthly but affect and significantly impact outputs. Were there any unexpected technical complications?

### **Users**

- Other complications caused by the user's skill level, other people involved, things missing, and errors made (however simple). Customer/ user types and the complexity of specific tasks.
- What are the other skills (skill levels) needed and were other users required (for certain tasks)? If so, what was their level of involvement?
- Identify any 'automatic' habits or routines. This can be done if observing a person doing the same job several times.
- Look at their body language, retorts they utter, frustrations that are visible!

### **The Environment**

- Other equipment that was needed to do the job. If so, what was its use and effectiveness? Where was it located and how was it accessed to get the job done?
- Look at the environment, layout, equipment, consumables, etc associated with this activity – you will learn dramatically more from observation than from what people will tell you is their norm.

### **Additional considerations**

- Identify what are the real problems/issues from your perspective based on observing users doing the job-to-be-done. Wear their shoes and look at the challenge from their perspective – specifically in terms of practical functionality and how they must feel emotionally.
- What opportunities did you observe (from your perspective)?
- What significantly impacts the outcomes based on your perspective (gained through the observations)?

- What 'needs' did you see? Expected needs but which still cause some issues.
- What surprised you? - that you did not expect. These could be verbal comments, body language as well as actual actions and events.
- What caused problems and did not work so well?

## After Undertaking Observational Research

### Document your observations

**Document observations:** Where research has been undertaken by your team, gather your team and map observations ASAP afterwards. Go through everything you captured and fill out as much detail you can remember while the experience is still fresh in your mind.

- Use stakeholder comments and sound bites (captured while undertaking the job). These can be of great value in discovering unarticulated issues and unmet needs.

### Analyse your Observations

#### Highlight the areas of greatest interest

Think about what might represent a compelling under or unmet need. Make a list of your questions around things you didn't understand or where additional information or clarifications are required to fully understand the situation.

#### Synthesise your findings

- Identify a range of topics, themes, and different types of observed users (if applicable).
- Using your notes, get each team member to share their observations. Capture this one-by-one on post-its. Categorise these under appropriate topics or themes...adding extra topics as they arise.
- Duplicated needs are noted with a \* on that post-it.
- When everyone has shared their observations, they can then add comments based on their observations.
- Group needs under themes / topics: When the needs are more clearly defined and can be grouped under a specific topic or theme. You will start seeing linkages between some themes and topics.
- Identify information gaps: This activity will give rise to further questions and clarifications needed. You may need to undertake further interviews with those involved or others to get these clarifications.

## Capture your Needs on EBNLab

Capture the needs identified in [Stage 1 of the EBNLab Process](#).

1. Start by identifying the problems or challenges identified through the analysis of your observational research. Take one problem at a time and rephrase as 'A way to (address the problem)'.
2. Identify who is most affected by the problem. It can be useful to map out the stakeholders involved in the process as part of this activity. Consider who uses it, who regulates it, who makes it, who distributes it, who buys it, etc. For further information see '[Stakeholder Mapping Guide](#)'.
3. Identify what outcome is most important to the population and how a Decision Maker would measure success. For example, is it a faster or more effective solution, is it less waste, etc. You may need to undertake further interviews and / or secondary research in order to determine the most important outcome to the population in question.

## Useful tools: Customer Journey Map

Map all the information captured using a [Customer Journey Map](#).

A Customer Journey Map (CJM) is a visual map of a specific job, process and procedures that a main user, operator or customer has to do. This tool allows you to visually capture how a 'job' is currently done by them and identify what works well and fails to work well at each step of the process.

1. Map each step you observed or heard about this job to be done.
2. Highlight what worked well and what did not work well.
3. Where things failed to work well, detail what you think the under or unmet need is from a functional, emotional or technical perspective.