



DESIGN THINKING MINDSET / DISCOVER PHASE / RESEARCH

# [How To] Conduct Field Research

An interview protocol and pre-visit workbook to aid in conducting interviews and on-site observations with end users for the project.

# Why To Conduct Field Research

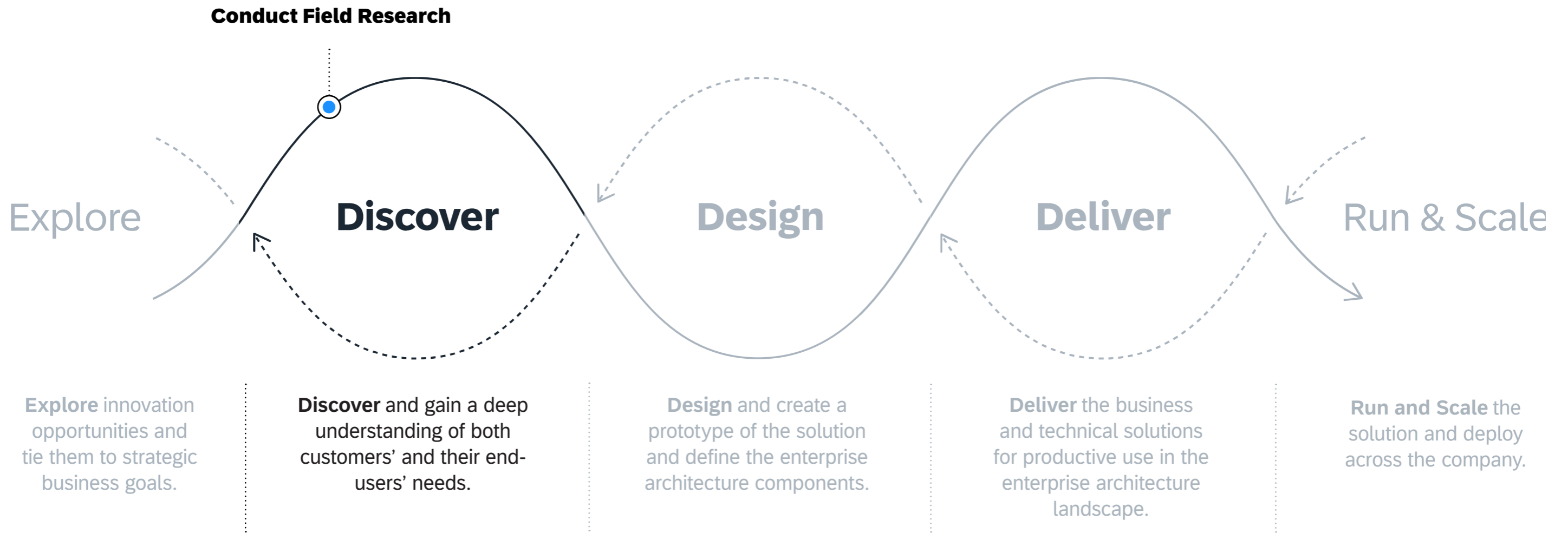
The “Field Research Guide” assists both the interviewer and the note taker during end-user observations and interviews.

By using a Field Research Guide, you and your teammates can align on the questions to ask and the areas to focus on. It also ensures consistency in conducting research and gathering data across user interviews, which helps your team analyze the data more effectively and arrive at user insights faster.



# When To Conduct Field Research

We use field research during the Discover Phase to interview users, observe their activities, tools, and environments, and uncover insights. These insights later guide the design of the solution.



Learn more about SAP's Human-Centered Approach to Innovation: <https://apphaus.sap.com/approach>

# How To Conduct Field Research



Duration  
**1 - 2 Days**



Participation  
**1 - 3 People**



Roles  
**Designers, Business Leads**

## Steps

- 1 Develop your interview protocol that the team members all agree on. See the **Interview Protocol** at the end of this guide.
- 2 Send a workbook to the customers' end users in advance to give them an initial sense of what to expect before the in-person visit. See the **Pre-Visit Workbook** at the end of this guide.
- 3 Pair up for interviews, assigning roles as interviewer and note taker. Listen actively, stay curious, and ask "why" frequently. Be mindful of body language – both your own and the interviewee's.
- 4 During your observations, take plenty of photos and videos (only with the necessary permissions). Collect any relevant artifacts that could inform your design challenge. Write down your impressions.
- 5 Debrief with your team members after each interview and observation session.

## Expert Tips

This guide can also be used for virtual-only research.

During interviews, make sure you ask open-ended questions, and avoid questions that can be answered with a simple yes or no. Open-ended questions start with 'what', 'why', 'how', 'when', 'where' and 'who'.

Avoid asking leading questions. For instance, instead of asking, "Do you like getting coffee?" which implies a preferred answer, ask, "How would you describe the experience of getting coffee?"