[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.

Interview Protocol

This protocol guides the interviewer and the note taker during the end-user interviews and observations:

- **Introduction**

- **Background Questions**

- **Interview & Observation**

  - **Show & Tell**
  - **Process Deep Dive**
  - **Pain Points and Room for Improvement**
  - **User Journey for the Processes**

- **Backup Questions for Interview**

- **Notes**

Created by **SAP AppHaus**

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AppHausNetwork

Interview Protocol
Introduction 01/06

Introduction (5 - 10 min)

• We are designers of   *(introduce your organization)*

• Project goal: _____

• We would like to capture your insights, understand the pain points and current situation.

"Don't worry—this isn't a test. We're not here to critique your work but to understand it fully. Our goal is to gain a clear understanding of your task flows and the tools and resources you use in this scenario as part of your daily work.
Please feel free to be open and honest; it's crucial for us to get an accurate picture of your everyday tasks."

• We're interested in any problems or unmet needs you experience related to this scenario.

• This interview will take approximately 60 to 90 minutes. You can have a break or stop the interview at any time.

• Is it alright with you for us to take pictures or recordings of your work environment?

• Can we have screenshots printed out?

• The information that we gather in our session will be fully anonymous and confidential.

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Interview Protocol
Background Questions 02/06

Interviewee Name: _Name_____

Department: _Department_____

Date & Interviewer: _Date & Interviewer_____

What is your official job title? _Answer_____

How long have you worked in this role? _Answer_____

Which software do you use? _Answer_____

Which additional tools do you use?

☐ Telephone
☐ Internal Guidelines
☐ Copy machine
☐ Mail

☐ Internal Guidelines
☐ Books, Lists, Manuals
☐ Online (Intranet)
☐ Files, Archives etc.

☐ Copy machine
☐ Printer
☐ Print

Further description of the workplace:
Equipment, hardware (e.g. number and size of screens), & tools are used. Take a picture/draw a sketch the user's work environment. Look out for sticky notes, folders, filing baskets, and describe how they are used.

Interview Protocol
Process Show & Tell 03/06

Note: Screenshots!

Key tasks (= use case)

Imagine that we were new colleagues, who are about to take on the same tasks as you in the future. ***Show and tell us***, how you work so that we don't struggle with the same difficulties and how your workaround is.

Which are your **main (E2E) processes** in your daily / regular business?

- 1 ___answer_____

- 2 ___answer_____

- 3 ___answer_____

- 4 ___answer_____

- 5 ___answer_____

Who are your **customer / stakeholders** (internally / externally)?

[   ]

Are you **working in a team**?

[   ]

Interview Protocol
Process Deep Dive 04/06

What is the trigger of starting this process/using this report? Why?

What are your most important tasks & information needs?

Who is your customer (internally + externally)?

Are there any recurring tasks? If yes, what are they?

How often and when do these tasks occur (weekly, monthly, etc.)?

Interview Protocol

User Journey for _____ 05/06

Interview Protocol
Backup Questions 06/06

Per key task:

Activity
- How do you know when to start the task?
- (e.g. by work-lists, messages, email, telephone etc.)?
- Which concrete steps do you have to make in order to perform this task?
- How do you know you are done?
- Errors handling?

Information Flow & Exchange
- Which concrete information do you need in order to execute each of these steps?
- Wherefrom (from whom) and in which form do you receive this information, e.g. which kind of reports, documents, access to specific databases or artifacts?
- Is the information you get sufficient? If no: which further information do you need to fulfill your task?

Decision Making
- Which decisions have to be taken in context of these tasks?
- How do you take the decision?
- Which decisions can be taken by yourself?
- Which decision needs to be taken by someone else?

Communication with other people / parties etc.
- Which additional persons (roles - e.g. tax payer, court) do you need to fulfill these tasks? What are these persons contributing then?
- How do you communicate with each of these process members (phone, eMail, letter, fax, face to face)?
- How (and where) do you document this?
- To whom do you need to transfer this information (e.g. status)?

General
- How do you ensure you fulfill your tasks in time?
- How do you document your work (e.g. notes)?
- What happens when you are not in the office?
- Career Path?

Pre-Visit Workbook

This Pre-Visit Workboook helps the team get an initial understanding of the end-user challenges.

- **Introduction**

- **Your Routine**

- **Best Day & Worst Day**

- **Tips & Tricks**

Introduction

Hello!

Thank you for participating in our research. The purpose of our meeting is to gain insights for:

Your scenario / use case

Please fill out this workbook. Do not worry about making it "pretty!" It will be of great help for our meeting.

I look forward to chatting with you !

Introduction (2 min)

Please tell us a bit about you below.

My name is _name_

And I work in _business unit, department_

My current position is _job title_

and I have been doing it for _____ years.

My main responsibilities include

Main responsibilities

Checklist (20 min max)

☐ Introduction (2 min)

☐ Your Routine (5 min)

☐ Best Day/Worst Day (6 min)

☐ Tips & Tricks (5 min)

Bonus points if you **help capture** the following **through photos:**

☐ Work environment

☐ Helpful tools, things, people

☐ Hindering actions, protocols

Draw yourself and your team here!

Your Routine

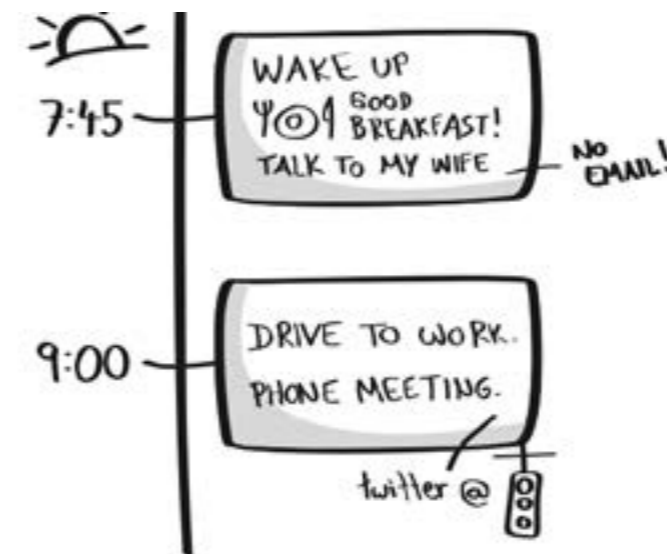Please **give us an idea of how you spend your day.**

What kinds of **activities** do you perform for your job?

How much **time** is spent each day doing each activity?

Please also include the following
• software, devices, tools/materials used
• people who are involved and/or talked to

Rough sketches and keywords are great,
since you will have the chance to verbally elaborate when we meet.

7:45 — WAKE UP
GOOD BREAKFAST!
TALK TO MY WIFE — NO EMAIL!

9:00 — DRIVE TO WORK.
PHONE MEETING.
twitter @

This is just an example ... No timeline is needed!

A few things I do…	Who I talk to…	How long it takes…	Things I use…
Your routine description			

Best Day & Worst Day

Take a moment to recall **days that feel great** on the job

What happened?

Take a moment to recall **not-so-great days** on the job

What happened?

What things (tools, protocols, or people) supported you?

What things (tools, protocols, or people) supported you?

12

Tips & Tricks (5 min)

What are **5 things that you would tell someone new** to your group

to help them succeed? *(This does not have to be related to applications or software)*

1)_____

2)_____

3)_____

4)_____

5)_____

Thank you!

Please put here any notes (highlights, concerns)

that you would like to discuss during our upcoming meeting.