



DISCOVER PHASE / Joint Activity

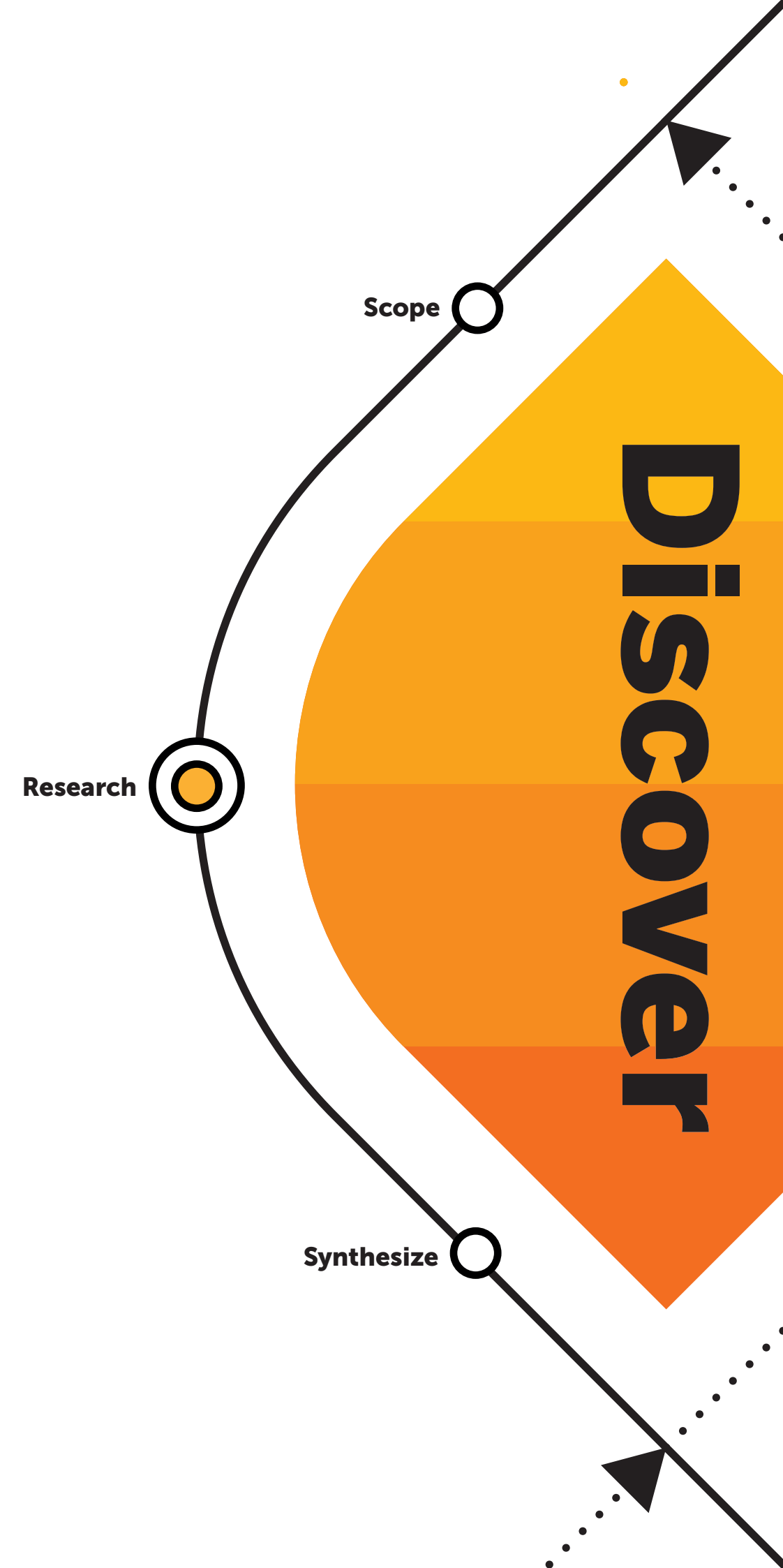
# Field Research Guide

An interview protocol and a Pre-Visit Workbook to assist with interviews and on-site observations with end users for the project.

# Why to use a Field Research Guide

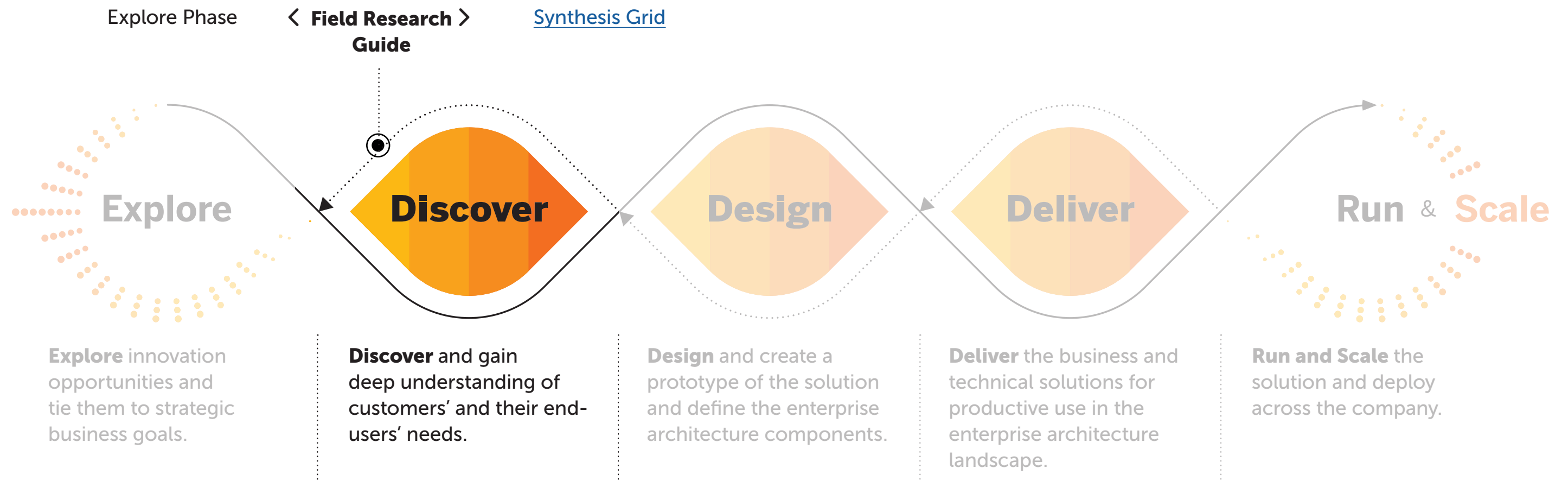
A field research guide supports the interviewer and the note taker during the end-user observations and interviews.

By following a field research guide, you can align with your teammates on what questions to ask and what to focus on. You also have consistency in both conducting research and gathering data across user interviews. This will in return help your team to analyze the data effectively and get to user insights faster.



# When to use a Field Research Guide

We use field research guides during the Discover Phase, when we interview users, observe their activities, tools and environments to discover insights. These insights later inform the design of the solution.



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

# How to use a Field Research Guide



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.
- 2** Send a workbook upfront to the customer/end-users to get a first feeling before the in-person visit. See the **Pre-Visit Workbook** at the end of this guide.
- 3** Pair up for interviews as an interviewer and a note taker. Listen, be curious and ask why. Beware of body language (your own and the interviewee's).
- 4** In your observations, take a lot of photos and videos with permissions in place. Collect any relevant artifacts for your design challenge. Write down your impressions.
- 5** Debrief with team members after each interview and observation session.

## Expert Tips

You can also use this guide for virtual-only research.

During interviews, make sure you ask open-ended questions, and avoid questions that lead to yes or no answers. Open ended questions come from 'what', 'why', 'how', 'when', 'where' and 'who'.

Don't ask leading questions. For example, the question "Do you like getting coffee?" is loaded. Ask instead, "How is the experience of getting coffee?"



# Template for Print

# 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**



# Interview Protocol

## Introduction 01/06

Introduction (5-10 min)

- We are Designers of Your company
- Project goal: \_\_\_\_\_
- We would like to capture your insights, understand the pain points and current situation.

*“Don’t worry. This is not a test. We are not here to critique your way of working, but rather to fully understand your work and how you do it. We want to gain a general understanding of your task flows and all of the tools and resources that you use in relation to this scenario in your daily work.  
Please be open and honest! It is very important for us to get the real picture of your everyday tasks.”*

- We are interested in any problems or unmet needs you have in relation with this scenario.
- This interview will take about max 60-90 minutes. You can have a break or stop the interview at any time.
- Is it alright with you for us to take pictures / recording of your work environment?
- Could we have screen shots printed out?
- The information that we gather in our session will be fully anonymous and confidential.

# 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?

- |  |  |                                       |
|--|--|---------------------------------------|
| <input type="checkbox"/> Telephone           | <input type="checkbox"/> Internal Guidelines   | <input type="checkbox"/> Copy machine |
| <input type="checkbox"/> Internal Guidelines | <input type="checkbox"/> Books, Lists, Manuals | <input type="checkbox"/> Printer      |
| <input type="checkbox"/> Copy machine        | <input type="checkbox"/> Online (Intranet)     | <input type="checkbox"/> Print        |
| <input type="checkbox"/> Mail                | <input type="checkbox"/> Files, Archives etc.  |                                       |

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



# Pre-Visit Workbook

## Introduction 1/4

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 **though photos**:

- ☐ Work environment
- ☐ Helpful tools, things, people
- ☐ Hindering actions, protocols

*Draw yourself and your team here!*

# Pre-Visit Workbook

## Your Routine 2/4

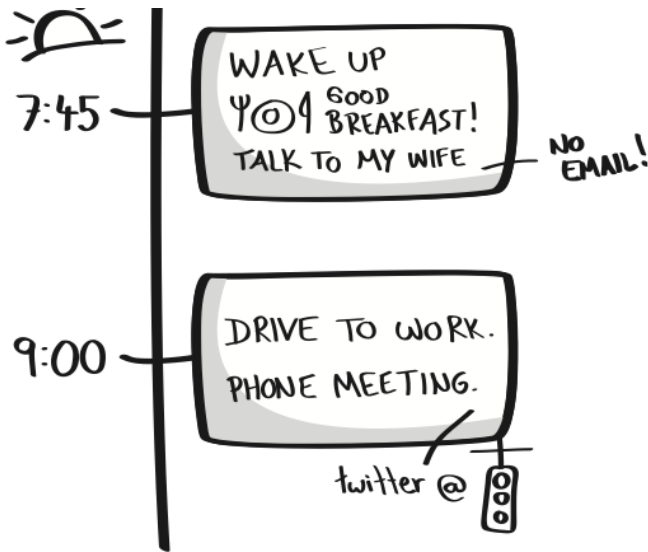
Please **give us an idea of how you spend your day.**

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.



*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*

# Pre-Visit Workbook

## Best Day & Worst Day 3/4

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

What happened?

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

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

What happened?

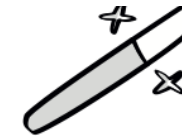
What things (tools, protocols, or people) supported you?



# Pre-Visit Workbook

## Tips & Tricks 4/4

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.

