FIELD GUIDE

TIPS & TRICKS

IDEO

1. **Prepare**
2. **Start off**
3. **Listen and Observe**
4. **Document**
5. **Do’s and Don’ts**

1. Prepare

Arrive early.

It’s important our team meets early and travels together to the visit. This is a great time to ask any last minute questions and get prepared before we walk into the session.

Be ready for long visits.

Interviews can be long, so remember to eat first and have snacks in between, use the restroom before each visit.

Keep it casual.

We want participants to feel comfortable with us, so we don’t want to appear too informal or formal. Business casual, or a nice shirt and jeans is perfect.

What to bring:

Bring notebooks & pens aplenty as you will be writing a lot. Snacks are also a good idea!

Ethics.

IDEO takes participant comfort very seriously in our fieldwork process, so we take a number of measures to ensure they feel protected and secure. Here are a few specifics:

Participant needs come first.
We seek to create an environment in which participants feel comfortable and at ease, which is why we limit the number of observers in any one interview and never press a question the participant doesn't want to answer.

True identities only.
We never misrepresent ourselves or our clients in interviews. We don't always identify our client due to confidentiality or bias reasons, but we never pretend that clients are team members.

2. Start off

Build rapport.

At the beginning of the visit, it is important to make the participant feel comfortable and gain their respect and trust. This warm-up will help the participants open up and share honest feedback instead of telling us what they think we want to hear. It is also important that we go into the session without preconceptions, assumptions or biases. Being open-mined will allow us to gain deeper insight into participants' perspectives and experiences.

For a warm hello:

a Thank the participants for giving us their time.

b Introduce the field team.

c Explain the purpose of the visit.

d Reassure participants by explaining that information gathered will only be used for internal research. Explain that photo & video taping are memory aids that help us later when we are synthesizing research.

e Ask if they have any questions.

3. Listen and Observe

Follow the (research) leader.

So that we don't overwhelm participants, let the Lead Researcher and participants direct the sessions' flow. Be patient as the lead researcher may want to approach specific topics later in the session. If something isn't answered, write it down so we can get back to it later in the session.

Keep it conversational.

Talk to the participants through conversation, not a formal interview.

Have the participant show you what they're talking about whenever possible.

Stay engaged by using non-verbal cues like eye contact, nodding, and smiling.

Don't rush, speak over, or interrupt the participants or you will lose their respect. Allow for natural pauses.

4. Document

Taking notes

During the session, it is important to document as much as we can. The Lead Researcher will be focused on facilitating the session, so other researchers should adopt a note-taking role.

A few tips on how to take helpful notes:

Write in the voice of the participant and try to capture direct quotes.

Stay in the moment. Try not to start synthesizing or analyzing during the visit.

Note whenever a participant describes workarounds they've developed for their problems.

Notice context. Capture what you're seeing, hearing, and whatever is happening around you in the space.

Pay attention to posture. Through the participants' body language, try to capture what isn't being said.

Taking photos and video

Make sure you have permission before taking photos. It is helpful when asking for permission to show the participants what you are using to document sessions.

A few tips on how to take helpful photos and videos:

Take photos discreetly without audible beeps or flashes.

Take photos of what the participants show us and any relevant content.

Avoid distracting the participants. Try to take shots from a side angle so that the participant isn't staring forward directly at the camera.

The camera should not be distracting.

Post-conversation download

When you step out of an interview, it is easy to feel overwhelmed by the amount of information you just heard. Use the ten minutes immediately after the session to start thinking about what you heard and learned.

Getting into the habit of downloading key highlights while everything is still fresh in your mind will make the synthesis process much more straightforward later on.

Design research is an ambiguous craft, it is OK to feel confused about what you heard.

A few tips to help:

Write down your notes on the download sheets in this guide or in your phone.

Keep your notes short and concise but clear enough for you to go back to and remember.

If time doesn't allow for this in the field, try to do it as soon as possible afterwards. Don't wait until you are storytelling with the team.

Write the stories and surprises that stuck with you.

5. Do’s and Dont’s

Do...

Always ask participants to explain their reasoning to get to the underlying meaning. Never assume you know their reasons why.

Stay engaged during the entire session. Refrain from distractions like checking your watch or phone.

Look out for non-verbal cues like workarounds or body language. People will not always verbalize how they feel or what they do.

Be polite. The participants’ responses are always right — even when they aren’t.

Don’t...

Don’t make participants feel like they’re being interrogated. Treat them as the expert in their own experience. You’re learning from them.

Avoid leading questions. Ask open-ended questions like, “What do you think of this?”

Don’t be afraid to ask the obvious. You may be surprised by their answers.

You’re ready!

We hope you get the most out of field visits using these tips. The main thing to keep in mind is that we’re here to learn from the participants.

When the visit is over, thank them for the session and leave time for their questions. After the visit, the team will debrief to discuss the main things each of us has learned. This is key to continuously capture our learning so we can make sense of it after all the field work is complete.