

What is a Contextual Enquiry?

Contextual Enquiry (CE) is a technique for examining and understanding users and their workplace, tasks, issues and preferences.

CE can be used to produce user needs analyses and task analyses.

The results of a CE feed directly into the design process.

Although CE is time-consuming, it uncovers a wealth of invaluable data.

When is CE appropriate?

CE is appropriate whenever you need to develop or communicate an understanding of the users of an existing or proposed system.

How is a CE conducted?

A contextual enquiry consists of visiting several users on site, observing them carrying out their tasks, and analyzing and documenting the resultant data.

How many people are needed?

Two people should be involved in any site visits, if possible. It is not possible to capture all the available information, but using two people maximizes the data returned.

At least two people should be involved in analyzing the data.

Site visit materials

When carrying out site visits, you will need the following materials:

- A list of representative users. Include both expert and novice users in your visits.

- Logging sheets. Expect to make copious notes. You may consider audio- or video-recording; however the unpredictable nature of the activity often makes this difficult.
- Demographic questionnaire for user profiling.
- User satisfaction questionnaire.



How do you analyze the data?

- Immediately after each site visit you should enter your data into a word processing program. Your notes should be at the lowest possible level of granularity.
- Number each note, and print them out on labels or cards. Use a system that allows you to trace every individual note to its source (for example, 'User 1, Note 57').
- Use the notes in sequence to construct sequence models of the tasks carried out.
- Use affinity diagramming to group all related issues.

Site Visit guidelines

Remember that the purpose of site visits is to learn from your users.

- Ensure you obtain appropriate approvals from management and employee organizations.
- Try to minimize disruption. However, try not to accept a time-slot that will not enable you to see the work being done in a typical fashion.
- Avoid preconceptions about the users and their tasks.
- Ensure that you do not give negative signals to the users, either verbally or by your body language.
- Do not prompt users to carry out tasks differently, or in an order other than the one they use normally.
- Do not rely on users' recollection of how they carry out tasks. Instead, ask them to carry out the actual tasks while you are on site.
- Listen and watch attentively. Remember that the users are the only domain experts.
- Be respectful of your users, their employers and colleagues.
- Be flexible. It is common to arrive on site to find that users' expectations do not match your plan, no matter how much effort you may have put into communicating your requirements. Be prepared to make the most of available resources.

Guidelines for data analysis

- Avoid unsupported conclusions. If a conclusion appears to be correct but unsupported, re-examine the data and your method to see whether you have missed anything.
- As a rule of thumb, plan for four hours of analysis time for every one hour on site.
- Be prepared to contact users by phone to verify any observations which are doubtful.