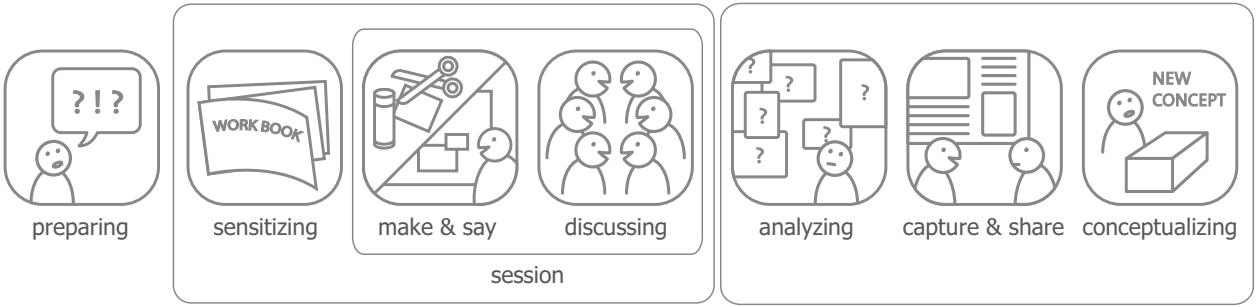
Procedure


? ! ?
WORK BOOK
NEW CONCEPT
preparing
sensitizing
make & say
discussing
session
analyzing
capture & share
conceptualizing
collecting user insights
share with and communicate to the design team

The contextmapping procedure

Doing a contextmapping study requires a mix of organisational, design and research activities.

On the following pages, we go through the steps of a ‘standard’ process, and discuss the what & why of each step. On pages 26-27, we present a list of tips and tricks for each step.

Many variations on this process are possible, depending on the particular needs and opportunities of each project.

There is not a golden rule that says that there always must be a session, or that collecting and sharing should be separate activities.

The procedure serves as backbone for organizing various user research techniques into a structured, but flexible, plan.

A mindmap capturing the initial knowledge of the researchers

Sensitizing workbooks are designed on the basis of this initial knowledge.

preparing

Procedure

Step 1 **Preparing**

see for tips on each step page 26-27

At the beginning of a project, a lot has to be decided: what is the topic of the study, which users are the participants. Examples are 'the shaving experience of men aged 18-75', 'social contacts between elderly people', 'the role of patient information in the work process of radiologists', or 'the early morning rituals of families with small children'. A clear focus is needed to guide the research project, and the design project as a whole. The researchers should also determine how wide should be the area around the focus that is explored.

Taking into account the design goal and the budget, a planning is made for the whole project: how much time and effort can be spent on recruiting and meeting the users, creating workbooks, conducting sessions, analysing results, communicating these results with designers, ...

In this phase also, preliminary research is conducted, e.g., first interviews with users from the target group, studying background literature. On the basis of these findings, the expressive tools such as sensitizing workbooks or probes, and exercises for the sessions are designed.

WORK BOOK

sensitizing

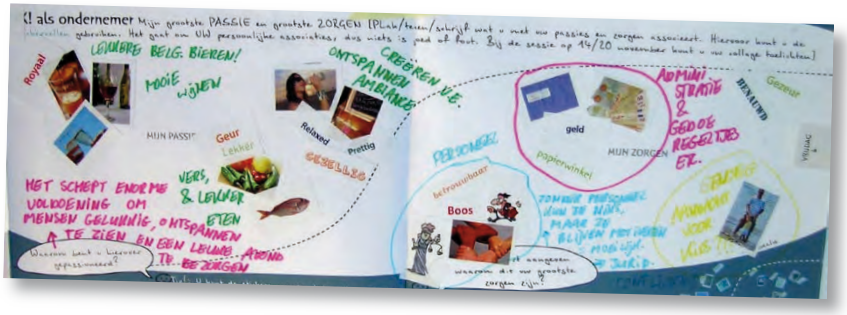
Procedure

Step 2 **Sensitizing**

see for tips on each step page 26-27

Small playful exercises make the users observe and reflect on their experience, and gradually builds up their awareness.

Some time before the session, users receive a sensitizing package, which helps them observe their own lives and reflect on their experience of the topic of the study. It can consist of various elements derived from cultural probe packages, such as an exercise book, postcard assignments, fill-in maps, and cameras.



We often use about a week for the sensitizing process, inviting and encouraging the users to spread the assignments over the week. Step by step they start to think about the topic, and allow some incubation time (‘sleep on it’) which gives opportunity to bring up memories, associations, and sharpen their sensitivity for the topic.

If possible, the researchers should deliver the sensitizing package in person to the users. This gives them an opportunity to establish a relation with the user, establish their trust, and form a first impression for the user.

make & say

discussing

*In a session, **users get** variety of tools and techniques to make expressions of their experience, and to present and discuss these with their peers.*

Procedure

Step 3 **Meeting**

see for tips on each step page 26-27

After sensitizing, the researchers and users meet for a session. This can be a group session, typically with up to 6 users, but it can also be an interview at the users' home or work location. In the session, a number of exercises is done, to gradually deepen the insights about the topic. The setup of exercises can follow the path of expression, e.g., start with discussing the workbooks, then calling up memories with a image-and-word collage, then move toward future considerations with other expressive tools, such as rough modelling.
One of the researchers facilitates the session, and attends to the process, another one takes notes and observes (and may give hints to the facilitator). With group sessions, it is important to invite participants to discuss freely and deeply about each other's considerations. Here, the participating users have an 'expert discussion'.

Some users may hesitate to express their opinions, or be shy. In facilitating such sessions, people can be put at ease by appropriate instructions ('There is not a right or wrong answer to this assignment: we want to know your answer because you are the expert here') and techniques (such as the AsSeenOnTV frame which provides a reassuring stage for presenting).

Analyzing involves activities as transcribing videos, selecting and interpreting chunks of data, organising these to form themes and distill insights, often as a group activity.

Procedure

Step 4 **Analyzing**

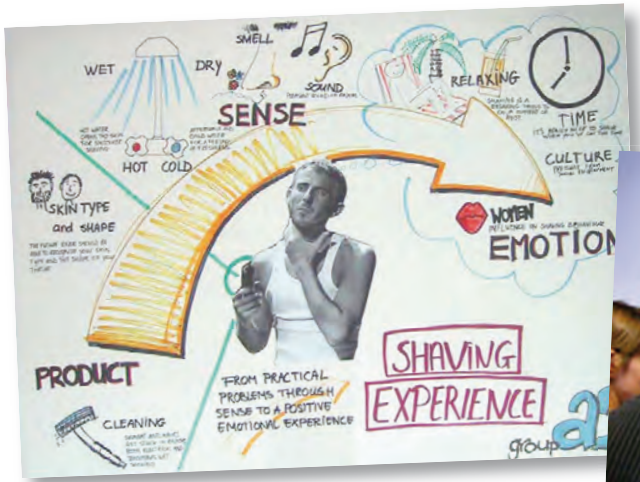
see for tips on each step page 26-27

Sessions and workbooks provide large amounts of raw data, which must be organized and interpreted to find patterns and examples, considerations and possible directions.
The data contains photographs and workbooks that participants made, expressive artefacts from the session, and often a video recording and full text transcript from the session. From the transcript, quotes are selected, interpreted, and organized.

Based on the first impressions of the research team, a qualitative analysis is performed. Different researchers go through the materials, make selections and interpretations, and try to find patterns of similarities and differences. Small or large portions of quantitative analysis may also be done, e.g., counting how often a certain issue was addressed. For instance, in a student project on the travel experience of rail commuters, it turned out that all of the participants extensively addressed the subject of smoking/no-smoking.

Making interpretations and categories, and creating a rich visual environment for the researchers to immerse themselves in are typical activities. Analysis can take up several days, and involve extensive discussions in the researchers.

Some visual-verbal communication tools.
From left to right an infographic, action poster,
personal cardset, social world card.



capture & share

Procedure

Step 5 **Communicating**

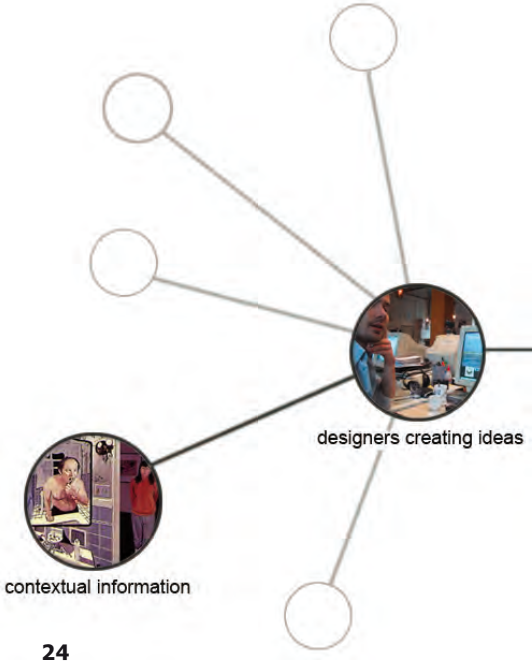
see for tips on each step page 26-27

In practice, the design team often has not met the users (unfortunately). The researchers have to bring across the 'user experience' to the designers, give them a feeling for the user's perspective, needs, and values.
In concept development, the designers need inspiration beyond the information given in statistics and diagrams of classical marketing research (although that also is valuable input). Designers indicate they are most inspired by raw data, such as quotes, home photos, and fragments of video of the users speaking. They also want to draw their own conclusions, so enough data should be added with the conclusions of the researchers.

A variety of communication techniques have been used and explored, exploring ways to convey 'pieces of experience', semi-complete 'action posters' and websites or workbooks that sensitized the design team, arousing their curiosity by providing snippets of insight, and helping them to make connections between their own experiences and those of the user.

Just as in the other research steps, communicating draws on design skills, in making visualisations and interactive forms to engage the receivers of the user insights, and inspire them to come up with better ideas.

Idea generation and concept development depends on many sources of information besides the context of use (technology, business,...). Combining all these factors is essential to good design, and the context information has to fit into this whole.



innovative product

conceptualizing

Step 6

Conceptualizing and beyond

see for tips on each step page 26-27

Communication serves to improve idea generation, concept development, and further product development. Also in later phases, it can be worthwhile to 're-use the same experts' by letting them evaluate the designs. In our experience, users are often highly motivated to look at the results again, and can build on the knowledge they generated many weeks after the original study. In the meantime, they often have become aware of new insights about their experience, which they enjoy sharing again.

Step 1 **preparing**

- Determine what you want to learn
- Capture your preconceptions in a mindmap
- Start selecting participants in time

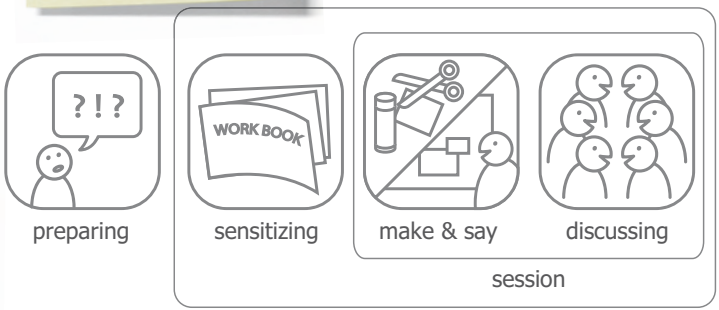
Step 2 **sensitizing**

- make it personal, but well cared-for
- make it inviting & playful
- always do Pilot testing when creating your materials
- invite the user to extend rather than answer
- meet your participants in person

Step 3 **meeting**

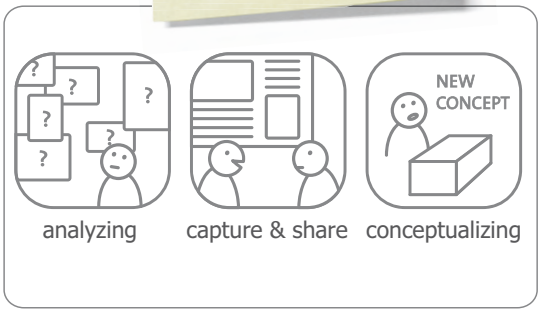
- Record it on video:
  facilitating
  - instruction: "you are expert of your experiences", "anything goes", and "respect each others stories".
  - ask questions like: "how do you feel about it", "what does it mean to you?"

  exercise toolkits
  - use diverse images & words (nature, People, interactions) 80-90 words/ Pictures often work well
  - select of ambiguous pictures
  - balance between positive and negative emotions
  - invite: don't make it too beautiful
- Write down your impressions immediately afterward



Step 4 **analyzing**

- immerse yourself in the data
- clarify your interpretations
- give it some time
- do it together (triangulate)
- be surprised
- find patterns



share with and communicate to the design team

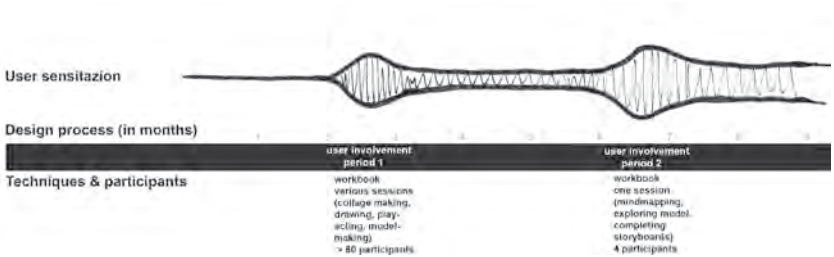
Step 5 **communicating**

- do a workshop
- sensitize the designers
- leave room for own interpretations
- make it personal
- show your contact was real
- show real People
- combine raw data with interpretations
- combine results with other (market) research results

Step 6 **conceptualizing**

- keep user & experience in mind
- tell stories. make storyboards
- do roleplaying

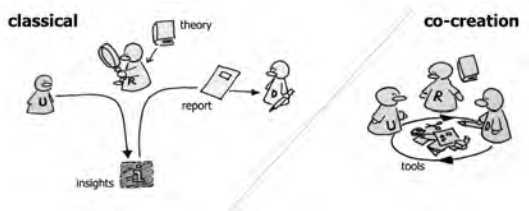
To each of the steps in the contextmapping process there are practical guidelines, tips, and tricks, which help conducting the techniques more successfully. Here's a few of them which we have covered in the course.



The procedure and techniques can vary widely. For instance, there can be more than one session (left), short augmented interviews (below), or different forms of tools (far below).

The contextmapping procedure is flexible

In the previous pages we outlined a standard contextmapping procedure, with clearly defined separate steps. But this is not the only way. The steps in the procedure are indications, but in practice the steps overlap. When a designer is also doing the research, the communication step will be different. Users may not just generate data for insights, but actual ideas for solutions. And insights and knowledge grows not just in the step of analyzing, but throughout the process.



The roles of stakeholders overlap, and are changing. In this booklet we speak of 'designer', 'user', and 'researcher', but these roles often are carried out by the same people, in teams, and in varying degrees at different times.

A study can vary from a large effort with tens of researchers down to short single meetings with users, in which generative techniques are used to 'augment' what is basically an interviewing technique. Often, designers are brought in to watch or participate in the sessions and/or analysis. Users may also participate in the analysis and/or concept generation. The tools that are used may be adapted to fit special circumstances of the users or researchers.