How to Conduct a Site Visit

Background and Best Practices for Site Visits

Quotes (for context) Related to Site Visits

"[Carol] Barnum writes that to learn about users, "you must first observe users, then talk to them, and match what they tell you with what you see and comprehend."

"The site visit offers and ideal way to accomplish this, allowing you to interact with users carrying out real tasks in real situation." (pg. 54, TT-CUEP training manual REV)

"You can survey, lean on other data, but nothing should replace the ongoing monitoring of users in the field. (pg. 20, TT-CUEP training manual)"

-Brian Still, Certified User Experience Training

## Goals of Site Visits: "The Ultimate Discovery Tool"

Goals:

- **What:** Trying to uncover:
    - who the customer is
    - what the customer does or what they are trying to do (TASKS)
    - what the customer needs in order to complete what they need to do (REQUIREMENTS)
- **Why:** Because then, we understand what we need to build, how we need to build it and what it needs to include
- **How:** 3 angles of the customer experience
- **Triangulate** the experience of the customer

DO: What user's do

SEE: what we see

SAY: What users say?
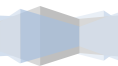
Methods

In order to gather what the customer does, what the customer says and what we see, we use two methods: interview and observation:

Best Practices for "Discovery" Observation:

1. Capture the TASKS: we are trying to capture the specific tasks the teacher did or asks the students to do

   Sample Observation section from Site Visit Guide

Time	TASK/Incident/observation	Comments (where/how)
9:00	O-prayer on overhead	Using smartboard
9:00	"Please read the prayer on the overhead to yourself"	Some students squinting
9:05	"Open your texts to page 64 and let's each read a paragraph out loud beginning with Jason"	
9:07	O-opening digital texts, but some books aren't accessible	

2. **Things to Note:**
   a. **Verbatim vs. summary:** We list the tasks just as the teacher or catechist says them (so we aren't summarizing). Because these tasks will inform the creation of the book in both content and design.
   b. **Get what you can:** you will begin to get a feel for what to capture and what not to capture.
3. **Remember the basics:**
   a. Stay inconspicuous
   b. Keep your expressions neutral

Best Practices for Discovery Interviews

1. **This is "discovery":** we are gathering insight, not statistics.
   a. Having said that, if you ask additional questions, take note, so we can ask them later again if we want to.
2. **Keep it conversational:** reiteration why you are here.
   a. Thank you again for taking time to meet with us. It's extremely valuable for us to be able to meet with our customers to better understand how resources are working for them.
   b. There is no right or wrong answers, we aren't looking for particular answers, just trying to understand more how this works for you, so anything you share will be helpful.

3. **When you begin (the interview) give them a sense of the structure** you will follow:
   a. I brought along some key questions I wanted to ask.
   b. At the end, I'll ask if there is anything else you want to share.
4. **How to go deeper or check the meaning of what you heard):**
   a. **Go deeper:**
      - "Tell me more about that…"
      - "Say more about that"
      - "How does that work"
      - "Can you describe that situation"
   b. **Checking meaning:** this can often become an invitation for someone to go deeper, or they emphasize something they maybe aren't sure you caught.
      - Let me see if I can summarize the main points of what you said.
      - Let me just check to make sure I've heard what you are saying.
5. **Ask open ended questions vs. leading questions**
   a. **Leading:** *"So this book is easy to use?"*
      - *Or "You like this book because of its size?"*
   b. **Open:** "Tell me about your experience with the Catholic Faith Handbook".
      - Or *"Describe your experience of using the Catholic Faith Handbook for youth"*.

Additional Information

- Safe Environments
- Parking
- Reception
- Badge/sign in
- Escort
- Water/Soda
- Introductions
- Cellphone
- What to wear

Saving docs (on doc/ in folder) **To ensure easy retrieval through search*

EX: Scripture-School-Site Visit Notes-102212-Benilde-MSP-Meager-Scripture-Eloise S

(Class topic- market type of doc-date-school name-city location-teacher last name--person who attended)