

Innovation Partnership: Procurement by Co-Design Toolkit

Field Study Guide

## Suggested Time

1 to 5 days.

## Difficulty

Hard.

## Materials

Smart phone with camera and video camera function; or digital camera and audio recorder; note taking stationery.

## Participants

At least two team members.

## Tips

Be yourself, not a sterile observer. Build rapport with the people. Take a moment to help someone or ask a question. Show interest in what they do and tell them so! Note how they are feeling and what their experiences are like.

It is one thing to read about the challenge and its impact on people. It’s another to actually understand. A Field Study deepens your team’s empathy and understanding through interviews, first-hand observation and experience. It can help validate or dispel assumptions, address questions and uncertainties, and reveal further paths of exploration. More importantly it cultivates in your team deep empathy for the people in the heart of the challenge, helping you uncover the undocumented and misunderstood.

## Steps

1. Looking at the journey map, process map, and your team’s notes, identify what needs further understanding and discovery. Pay attention to users, stakeholders and interactions at the heart of the challenge. Look for important events and also where they seem to begin unfolding.

* Which are backed by good enough evidence?
* What are assumptions and beliefs?
* Why are things happening in this way? If they are undesirable or negative, why do they continue?
* What can help create change?

1. Keeping an open mind, create a list of learning goals, questions that you would like to answer or explore. Sort this list, prioritizing the questions or groups of questions that would provide your team with the most valuable learning. Think about the AEIOU of your study:

* (A)ctivities you need to understand or observe
* (E)nvironments that will be important to visit
* (I)nteractions between people, or an object and person, that you need to understand or observe
* (O)bjects that need exploring
* (U)sers and stakeholders that you need to speak with and observe

1. Determine which field study approaches you will use (see below). You should always consider more than one approach.
2. Make a quick plan that would allow your team to obtain the most valuable learning and collect the most interesting data. Consider your team’s time, resources and what environments or people you can access.
3. Undertake the studies.
4. Collate and review the data as a team. Identify important insights and data that help address your learning goals and questions.
5. Review and update the process maps, journey maps, and stakeholders maps based on your observations if needed.

Here are some field study approaches.

* See and Experience – Innovator’s Guide Book. Centre for Care Innovation: <http://www.careinnovations.org/uploads/Innovators_Guidebook_Final_online_version.pdf>

Observation

* Guided Tour. IDEO Design Kit. http://www.designkit.org/methods/46
* Peers Observing Peers. IDEO Design Kit. <http://www.designkit.org/methods/47>
* Experience Tour. DIY Toolkit <http://diytoolkit.org/tools/experience-tour-2>
* People Shadowing. DIY Toolkit <http://diytoolkit.org/tools/shadowing-2/>