

Innovation Partnership: Procurement by Co-Design Toolkit

Site Visit Guide

## Suggested Time

1 to 3 hours.

## Difficulty

Moderate.

## Materials

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

## Participants

At least 1 vendor team member and 1 provider “tour guide.”

## Tips

Take pictures and take notes during the tour on anything that you find interesting. Make notes on what to study further.

The best way for your new team to start understanding your complex design challenge, is to begin with a show-and-tell site visit. It will give team members an appreciation of the challenges and possibilities that will shape the design of your solution. It helps your team members participate more effectively in mapping activities such as mapping stakeholders, processes, and user journeys. It will also help you determine where to focus your time for the field study.

## Steps

Prior to the visit

* Determine who will lead the tour. This should be someone who understands the challenge and its various touch points.
* Review the challenge brief. Focus on where you believe the most important human-human and human-system interactions take place in relation to the challenge.
* Create the ‘itinerary’, highlighting what the team should look out for. Make sure you plan for time to observe and for team members to ask questions, even interact with the people on site. Set a date for the site visit. Make the necessary arrangements to ensure that your team can visit and observe the selected touch points safely.

On the day of the visit

* Start with a short brief using the itinerary: what the tour will see, what they might want to pay attention to, etc.
* Tour!
* After the tour, debrief on what was seen, heard and felt. Identify what could benefit from more data, in-depth observation or study. Identify who are potential users and stakeholders for the solution that will be designed.