

Is Ethnography Possible without Field Research?



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TECED

TecEd Company Snapshot

- Founded 1967: Offices in Ann Arbor and Palo Alto
- Early practitioners of user research
 - Contributed to the development of early usability testing methodologies that are standard today
- More than 150 clients; close to 2,000 projects
- Apps, websites, devices, other products for B2C/B2B



Ethnography in Field Research

- Researchers observe people in their own environments to learn their behavior
- Users' real-life context affects product use: motivations, constraints, workarounds



Field Research Methods



Contextual inquiry

Ethnographic interviewing



Accepted, then Rejected

- After years of missionary work, field research gains funding
- Condensed forms of ethnographic interviewing and contextual inquiry fit development timelines



But now site visits to businesses face strong resistance, so B2B field research is stymied

What If You Can't Visit Users?

- Remote interviews with screen-sharing
- In-person interviews at users' homes or in a neutral setting
- Retrospective interviewing methodology when screen-sharing not permitted
- Pre-interview diary studies

Case History 1: Purchasing Agents

- TecEd's client wanted to learn how buyers and purchasing agents buy new products and products they replenish
- How do buyers research, discover, and select what they need?
- What should a personalized business shopping experience look like?
- What tools would facilitate what kinds of purchase decisions?



Purchasing Agents

- Goal was 16 contextual interviews at businesses in Midwest and Northeast
- But most candidates who met the screening criteria could not get permission for us to visit
- Most employers prohibited visitors to the purchasing/procurement department
- After 6 weeks of recruiting, only 3 companies let us visit!



Purchasing Agents

- 6 more participants accepted remote interviews with screen-sharing
- The final 7 interviews were remote teleconference-only sessions (no screen-sharing) using retrospective interviewing techniques
- These participants were less inhibited, adding insights



Case History 2:

Customer Care

- TecEd's client wanted to identify pain points in customer care professionals' workflows
- What do these people do now that our client's products could support?
- What tools are they using to support their workflows? What workarounds?
- What emotions are they experiencing during the process?

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- Goal was 9 contextual interviews at Midwest companies
- Learning from Case History 1, we defined the research with only 5 of 9 sessions as site visits
- TecEd's client wanted more site visits, but accepted our recent experience

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Customer Care

- The client also wanted interviews with both managers and individual contributors
- And agreed with our suggestion that both from one company could provide perspective and insights
- So in two cases, one site visit permission covered two interviews

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Customer Care

- TecEd staff had personal contacts at two of the final three sites visited
- Visit permissions required weeks of emails to several management levels
- The other 4 sessions were held in TecEd's usability lab, preceded by a diary study where participants took and captioned photographs of their workflows
- Client observed all 9 sessions

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What Did We Learn?

- Only a minority of ethnographic interviews with business users can be on-site field research
- Substantial work effort, lengthy timelines, and (preferably) personal contacts are needed to obtain visit permissions
- A neutral setting or remote teleconferencing is necessary for most interviews



Skills in retrospective interviewing methodology are critical for researchers

Thank you!



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