

# 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

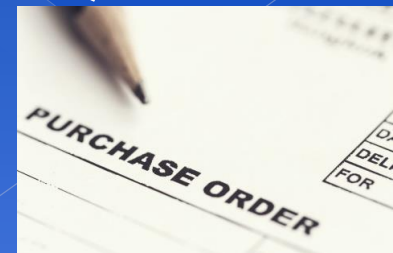
- Goal was 16 contextual interviews at businesses in Midwest and Northeast
- But most candidates who met the screening criteria could not get permission for us to visit
- Most employers prohibited visitors to the purchasing/procurement department
- After 6 weeks of recruiting, only 3 companies let us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

**CUSTOMER**  
CARE

# Customer Care

- 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

**CUSTOMER**  
CARE

# 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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CARE

# 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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