Understand your customers experience.

USER SHADOWING

User Shadowing is a research methodology for understanding how people interact with the services around them. It involves directly observing customers to identify and understand their needs. Researchers follow a customer as they use a service and document what happens in an unobtrusive way.

User Shadowing originated out of 1950's Management Studies and Henry Minzberg's 1970's iterations on structured observation.

User Shadowing is used to gain understanding of an individual's behaviour, opinions and drivers as well as to understand a person's role and paths through an organization or interactions with other objects or people in a given setting. It is used in organizational change assessment, product marketing or positioning, and experience and service design. User Shadowing can be conducted over long periods of time if budget and schedule allow, or applied more rapidly to gain a quick understanding of a problem.

The process works as follows;

STEP 1: Study Area and Demographics. Time should be spent identifying the correct people to shadow. In general, a relatively small group is sufficient as the aim is to get rich information and insights to drive the design process. Locate the right venue to research and the appropriate people within that venue to follow. This exercise could also involve research into the roles, language/terminology used and issues at hand.

STEP 2: Secure Access to Users. It could take as long to gain access as it does to complete the entire research exercise. Access needs to be as unrestricted as possible and could involve contacting third parties for suitable permission.

STEP 3: Build Trust. The goal of user shadowing is to gain full insight into user's opinions. To achieve this, the researcher needs to create a solid rapport with the person being shadowed. If the participant does not feel comfortable, critical information could be missed. The researcher must continually work at managing the relationship throughout the shadowing period.

STEP 4: Shadowing. The researcher follows a user closely, while writing an almost-continuous set of field notes. The researcher asks frequent questions for clarification and prompts the user to describe his or her actions and choices.

STEP 5: Record. The researcher records their notes from the exercise and adds debriefing notes. If the shadow period continues over multiple days, debriefing must be done after each session.

STEP 6: Analysis. The researcher analyses the data that has been accumulated during the shadowing period. Methods of data summary and presentation could include storyboarding, narratives and persona/character sketches.

Shadowing might take place in one session or over different sessions and is done as unobtrusively as possible. Getting immersed in a person's life helps identify the barriers and opportunities they encounter, even those the user is not explicitly aware of.

It allows the researcher to develop real understanding of service interactions, and see the differences between what people say and what they do.

The output is in general written documentation with supporting visual materials such as photographs, drawings or video captured during the shadowing session.