

TECHNOLOGY

Phase II: Expanding and Integrating



Activity: Shadow Observations

Goals

1. Gain insight about users' jobs, pains, and gains
2. Learn about users' day-to-day work in a real-life setting
3. Incorporate end-users experience into program planning

Prerequisites

None

Who Should Participate?

Program management (tactical thinkers)

Length

60 minutes per shadow

Activity Instructions

In shadow observations, one or more members of the program staff observe an end user interacting with the software. Generally, the people observing the user don't interfere with the user's actions - the idea is to see how they go about their daily work as normal.

This activity can be done in-person, or online via screen-sharing.

Pre-Work

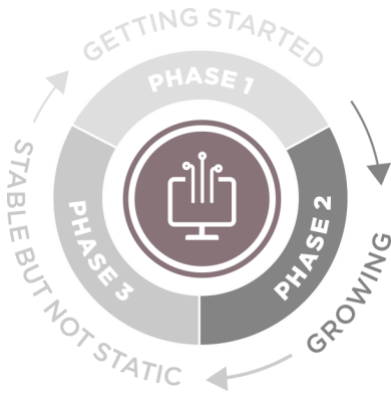
Work with program colleagues to:

- Determine the goal of the shadowing exercise - do you want to see how a new feature is being used, get information to help with prioritization, etc.?
- Invite the community to volunteer for shadowing. Your invitation should include:
 - Brief description of what shadow observation is
 - Length of observation
 - Platform
 - Whether it will be recorded (recommended if online)
 - What specific interactions you'd like to see, e.g. logging in, adding content, running a report, etc.

During the Observation

- Beyond the initial prompt (show me how you...), try not to interfere with the user, just let them use the software normally
- Ask the user to narrate their actions as they complete them
- Keep track of your observations as they happen, the template below may be helpful
- Hold questions until the end when the shadowing is complete

Draft materials produced for ITAV in Practice © LYRASIS; Final materials will be released under a CC BY license. Materials adapted from: "Shadowing in User Research - Do You See What They See?" The Interaction Design Foundation. Accessed December 15, 2020. <https://www.interaction-design.org/literature/article/shadowing-in-user-research-do-you-see-what-they-see>.



TECHNOLOGY

Phase II: Expanding and Integrating



Activity: Shadow Observations

After the Observation (Still with User)

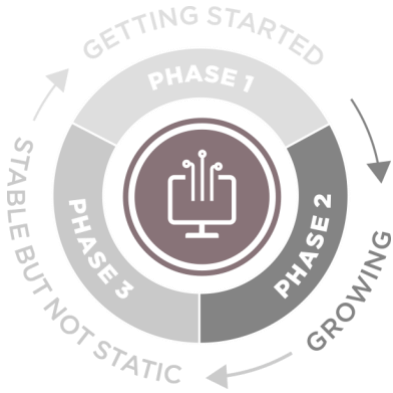
- Ask questions! Ask the user to clarify anything you didn't understand or would like more detail about.
 - Consider using a technique such as the [Five Whys](#), which asks "why" questions in response to five consecutive answers. This prompts the user to examine and express the underlying reasons for their actions.

After the Observation (No Longer with User)

- What did you learn?
- What positive interactions did you observe?
- What pain points did you observe?
- How can you fold your findings into future road mapping and prioritization exercises?
- Summarize the high-level results and share them with the community
- Work to prioritize concerns/needs and fold into road mapping activities

Sample Notes Template

Time	Activity (What I See)	Notes (What I Think)



TECHNOLOGY

Phase II: Expanding and Integrating



Activity: Shadow Observations