

# Team-Based Ethnography

Extending User Research without Extending Schedules

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## **About Interfacility**

Interfacility offers a range of user research and interface design consulting services.

For more information about our services, see <http://www.interfacility.com>.

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# Team-Based Ethnography

An Integrated User-Centered Approach for Project Teams

## Overview

Project success depends on the fit of a product or service with user goals and needs. Project manageability depends on a solid shared foundation for swift and effective decision-making. The Team-Based Ethnography offers a methodology to achieve both.

The Team-Based Ethnography enables project teams to get to know users and to design for their needs. It lets teams adjust basic project management processes instead of adding new activities onto the existing workload. The approach focuses on

- sharing and leveraging existing knowledge about users and their context
- integrating a user-centered perspective into the design and development process
- containing the project schedule and budget

## Benefits

Project teams are able to integrate the gathering and interpretation of knowledge about users with their regular activities and scheduled meetings. Time commitments remain minimal, and projects are accelerated rather than drawn out. Specific benefits include:

- team-centric rather than vendor-centric
- products and services respond to user goals, habits, and preferences
- foundation for effective decision-making in planning, design and implementation
- shorter development timelines resulting from greater clarity about design directions
- knowledge transfer of a user-centered design and development methodology to the project team

## Deliverables

The central deliverable coming out of the Team-Based Ethnography is a manageable research-based, user-centered design and development process. The process revolves around “The Mural”—an ethnographic framework built collaboratively and annotated throughout the project. It includes demographics, personas, scenarios, a feature meter, and an annotated workflow.

The project concludes with an evaluation following launch. A single evaluation session results in an evaluation report that reviews lessons learned and helps solidify the user-centered design perspective in the team.

## How's This Different from Rapid Ethnography?

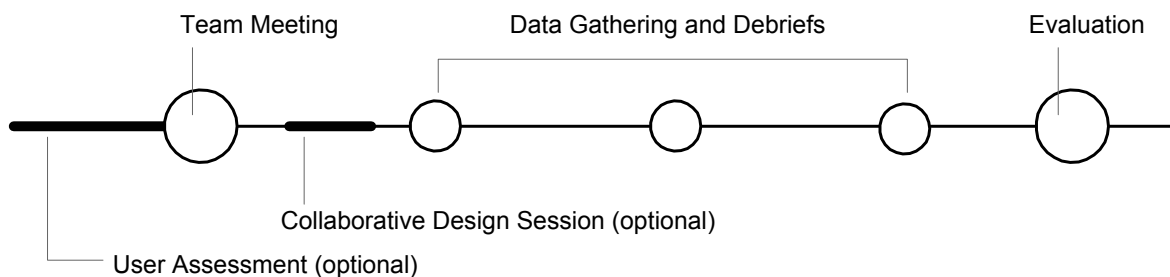
The Team-Based Ethnography uses many of the same tools that are used in such standard user research approaches as rapid ethnography and contextual inquiry. Indeed, in some projects it is advisable to incorporate a rapid research cycle into the project.

The Team-Based Ethnography extends standard approaches in four dimensions:

- **Time:** extends the research phase into implementation, making it possible to gather more (and more reliable) data, find answers to new questions, and validate design choices
- **Team:** extends the user-centered perspective into the development process
- **Organization:** extends the user-centered perspective into the organization, socializing the user focus and creating opportunities for knowledge sharing
- **Design:** extends the research process into design, bridging from results to design decisions and back again to an agenda for further inquiry

## How It Works

The Mural is the driver of the Team-Based Ethnography. The basic framework is created in the Team Meeting, which also serves to decide on roles and contributions and track open questions. From that point on, the team elaborates, adds to, corrects, and interprets the Mural in regular team meetings, making results continually available as a basis for design and testing. Interfacility meets with the team for occasional debriefs over the course of the project to review new findings and plan appropriate testing. The engagement concludes with an evaluation.



## Accelerating Projects

The Team-Based Ethnography tends to accelerate projects since it helps clarify requirements and provides a basis for quick but reliable decision-making whenever questions arise during the implementation phase. Additional time is gained when the optional components—the initial user assessment and the collaborative design session—are combined with the basic process.

### Optional User Assessment—Performed by Interfacility

Consists of user interviews, participant observation, ride-alongs, and other ethnographic techniques to gain quick insight into user context and preferences. Although length depends on the nature of the targeted user base, a typical user assessment for an internal application development project will take one to two weeks.

### Optional Collaborative Design Session—Led by Interfacility

Includes all team members who contribute to and influence the design of the site or application. The design session focuses on translating knowledge about users into specific design requirements; generating design ideas; and developing an evaluation procedure for those ideas.

# The Mural

The Mural is a “living history” of all knowledge, suppositions, questions, suspicions, and hunches that employees have about users. The basic framework is first created in a collaborative Team Meeting, on the basis of a user assessment if one has been done or simply on the basis of any knowledge the team has. Any new insight or data that the team gains in the course of the project is added to the mural. And anyone who happens by is welcome to add their own knowledge of and experience with users to the story panel or to annotate the data structures.

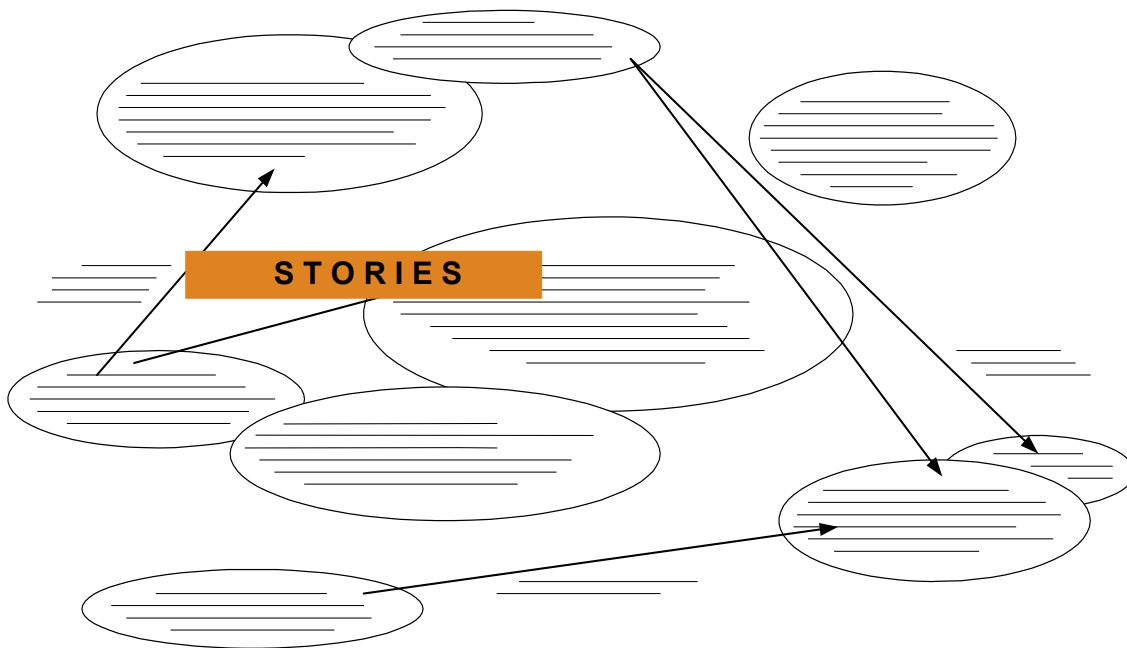
Team members take on different roles, according to their own inclinations and talents.

A research agenda is kept alongside the Mural to keep track of questions raised by new knowledge. The agenda eventually merges with the testing schedule as the project advances and testable prototypes become available.

For co-located teams, the Mural is done on butcher paper on the walls of the project room. For virtual teams (or for projects where it is important to provide electronic access), the Mural is done in an electronic format using Interfacility’s template.

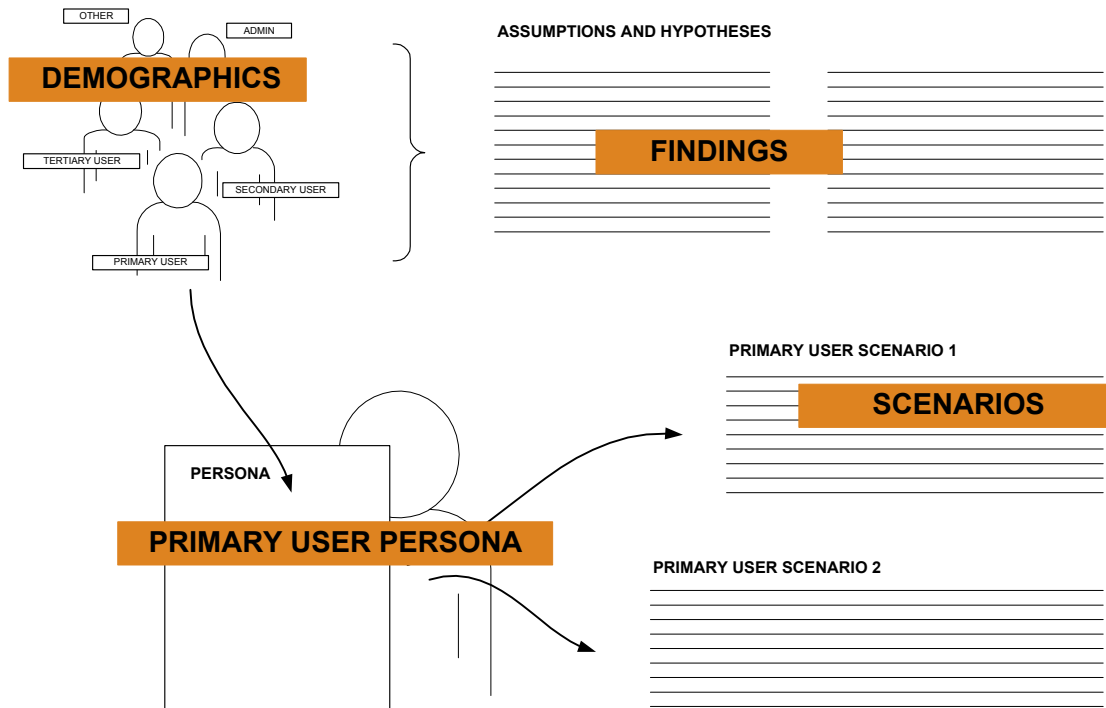
## Data Gathering and Reduction

Following the tradition of ethnography, the knowledge gathered in a Team-Based Ethnography is open-ended. Judgments about what is relevant are delayed as much as is humanly possible. The “raw data,” no matter how it obtained, is gathered in the story panel—a collection of all stories, experiences, facts, and reflections related to the user experience. Relationships between stories (contradictions, parallels, confirmations) are noted whenever they become apparent. If the stories become too numerous and dense to be “readable” in the story panel, then data reduction techniques such as affinity diagrams are used.



## Interpretation

The stories form the basis for the interpretive structures of personas, scenarios, feature meter, and so on. The interpretive structures remain subject to revision throughout the project. The general interpretive framework is adapted to the nature of the project. The categories that are central to every project are shown and discussed below.



### Assumptions and Hypotheses

One of the central tenets of the Team-Based Ethnography is that all knowledge about users is provisional. (Not only are social environments enormously complex, but users change—sometimes even because of the work we do.) Consequently, there are no conclusions, only assumptions and hypotheses that will need further elucidation and are perpetually subject to revision.

### Demographics

This structure focuses on user segmentation and the numbers and characteristics associated with each segment. The main emphasis is on the relative importance of each segment, to help facilitate rational decisions about resource allocation.

### Personas

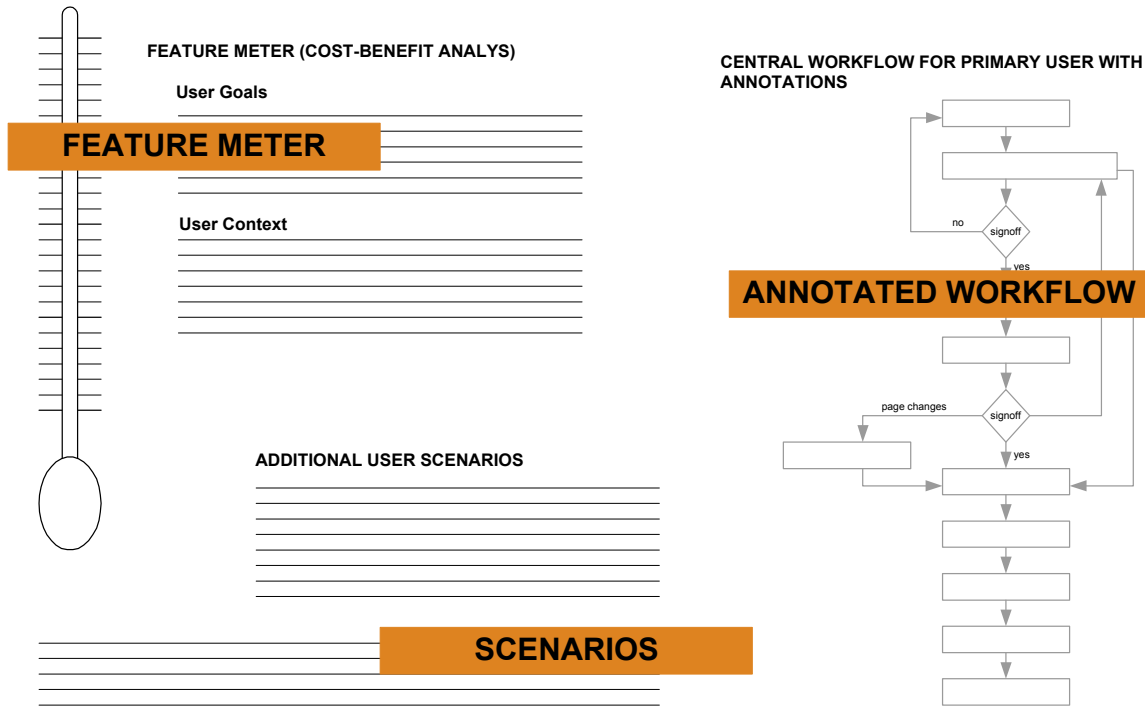
The approach to the persona is that of fictional realism: plausibility and vividness are the main criteria. Personas are given a name and accompanied by pictures to make them more real to the team. Persona work focuses on representatives of the most important audience, and a single one is chosen to represent the primary user.

## Scenarios

The best scenarios are those contributed by actual users. However, if the team does not have access to actual users, these are made up together with the personas. The Mural accommodates significant numbers of scenarios without losing focus, and so scenarios are provided for all audience segments.

## Feature Meter

Every feature is associated with a cost in the sense that it adds to the complexity of the interface and thus imposes a burden on the user. The feature meter is a high-level cost-benefit analysis that relies on user goals and user context to calculate the cost of adding features (on a rising slope). It helps teams remain aware of the trade-offs involved in expanding or reducing the feature list.



## Bridging to Design: The Annotated Workflow

The Team-Based Ethnography begins to bridge to the design process by means of a draft workflow for the primary user on the basis of the persona, its associated scenarios, and any other data from the story panel and interpretive structures. The most important feature of the workflow is the annotations pointing back to the rest of the Mural.

If a separate collaborative design session is scheduled then the workflow will be done there.