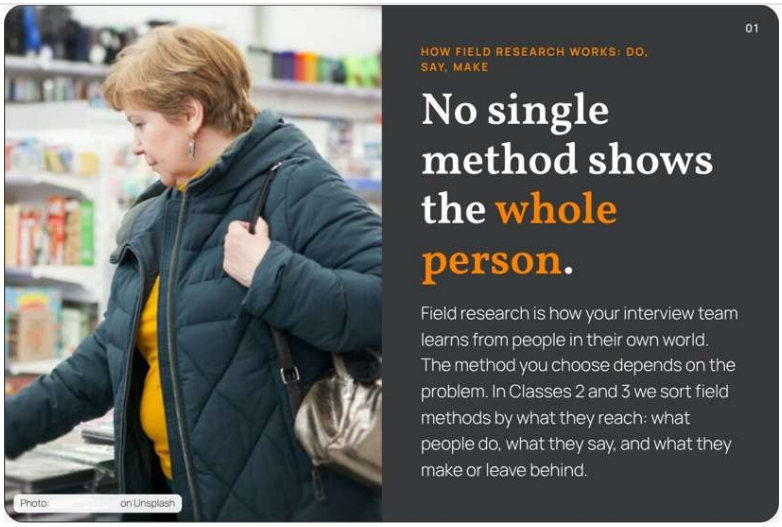
BUAD 317 · SLIDE NOTES

Field Research Methods: Do, Say, Make

Each slide is on the left. Type or write your notes on the right. https://julesmorrisphd.com/teaching/smith-gls/buad-317/data-collection-methods/



Slide 1

My notes



Slide 2

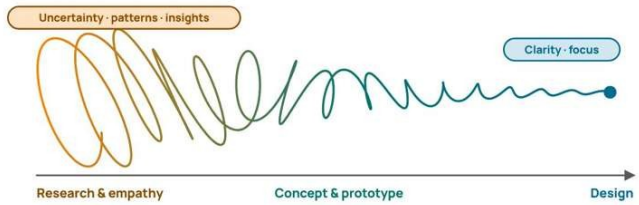
My notes

03

IT'S A MESSY PROCESS

Expect it to feel messy at first.

Field research is the tangle at the start. You are collecting stories before the patterns show up.



Our own drawing, inspired by the idea behind Damien Newman's Design Squiggle.

⊕ Text version of this diagram

Slide 3

My notes

04

THREE KINDS OF DATA

Stories explain why. Numbers show how many.



Our own drawing.

⊕ Text version of this diagram

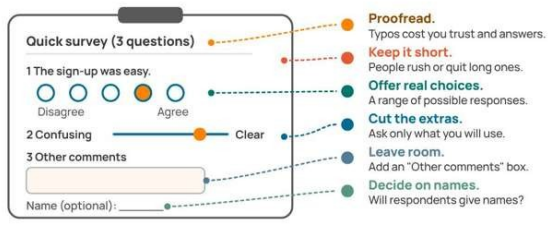
Slide 4

My notes

05

COUNTING WHAT YOU HEARD: QUANTITATIVE TOOLS

When you need to know how many, use a scale.



Our own drawing. The survey questions are made up.

⊕ Text version, and more on the scales and tools

Slide 5

My notes

06

WHERE TO LOOK FOR INSPIRATION

Learn from four kinds of sources.

The Field Guide points to four places to learn. Plan a mix before your interview team heads out.

- **P** **People** — The people you design for. Their stories, habits and work-arounds come first.
- **E** **Experts** — People who know the system from the inside or have studied it: staff, researchers, suppliers.
- **I** **Immersion** — Go where it happens and do it yourself. Ride the route, wait in the line, use the app.
- **A** **Analogous settings** — A different place with a similar challenge. A hotel front desk can teach a clinic about first impressions.

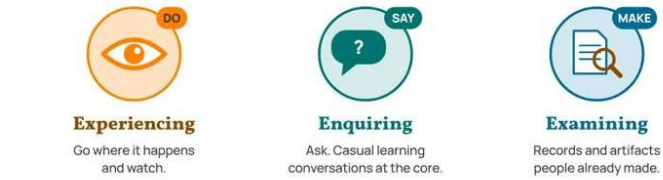
Slide 6

My notes

07

THREE WAYS INTO PEOPLE'S EXPERIENCE

Watch what they do. Ask what they say. Examine what they make.



Experiencing — Go where it happens and watch.

Enquiring — Ask. Casual learning conversations at the core.

Examining — Records and artifacts people already made.

Our own drawing, based on the Three Es in Mills's action research text.

⊕ Text version, and Field Guide pages and sources for each

Slide 7

My notes

08

THE THREE ES, BRANCH BY BRANCH

Each E has its own set of tools.



Our own drawing, based on the taxonomy of action research data collection techniques in Mills's action research text.

⊕ Text version of this diagram

Slide 8

My notes

09

COMPONENTS OF EFFECTIVE OBSERVATION

Decide how involved you will be. Then write it all down.



Our own drawing, based on the observation slides in the Class 3 deck.

⊕ Text version of this diagram

Slide 9

My notes

10

SAY, DO, MAKE: LEVELS OF KNOWLEDGE

Each kind of method reaches a different depth.

Design researcher Elizabeth Sanders explains why you need all three.

1. **Say: explicit knowledge**
   What people say gives you explicit knowledge, the things they can put into words.
2. **Do: observable knowledge**
   What people do gives you observable knowledge.
3. **Make: tacit and latent knowledge**
   When you invite people to build, draw or sort, they show tacit knowledge (what they know but cannot easily explain) and latent needs (needs they do not yet know they have).

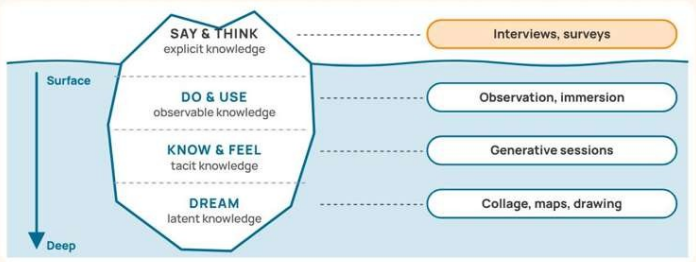
Slide 10

My notes

11

HOW DEEP EACH METHOD REACHES

What people say is only the tip.



Our own drawing, based on Elizabeth Sanders and Pieter Jan Stappers' say, do, make framework (2012).

⊕ Text version of this diagram

Slide 11

My notes

SAME TOOLS, TWO LABELS

Card sort, collage, draw it: asking or making?

- The Field Guide lists card sort, collage and draw it under asking.
- In Sanders's view they are making activities, because the person builds something.
- **Either way,** use them when people struggle to explain a feeling or a choice in words.



My notes

Slide 12

13

CURRENT VS. IDEAL: WHAT EACH CONVERSATION SHOULD UNCOVER

Learn how people feel first. The design follows.

	THE EXPERIENCE	THE THING TO DESIGN
CURRENT today	1 How does the person feel today using the product, service or space?	3 What about the thing makes them feel this way today?
IDEAL future	2 How does the person want to feel when using it in the future?	4 What must the thing do to deliver that experience?

Our own drawing of the two-by-two in the Class 3 supplemental slides.

⊕ Text version of this diagram

My notes

Slide 13

14

FOUR TYPES OF INFORMATION TO LISTEN FOR

Listen for steps, moments, feelings and wishes.

Every conversation can give you four kinds of information. Make sure your guide reaches all four.

P	E	E	A
Procedural	**Experiential**	**Emotional**	**Aspirational**
What are the steps? Every action it takes to get the job done.	The defining moments in their experience with the product, service or space.	How it makes them feel. Listen for "I like... because..."	What they wish were happening, how they want to feel, what would help. Listen for "I wish" and "I want."

My notes

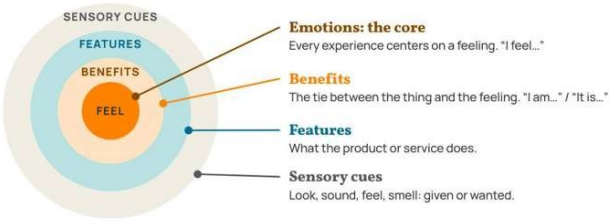
Slide 14

15

ANATOMY OF AN IDEAL EXPERIENCE

Emotions sit at the core.

Work from the outside in, until you reach the feeling.



Our own drawing, based on the anatomy of an ideal experience in the Class 3 data collection slides.

⊕ Text version of this diagram

Slide 15

My notes

16

UNCOVERING NEEDS ALONG THE PATH OF EXPRESSION

A good session is a path, from now to next.

Sanders and Stappers describe a good session as a path. Making activities help at every step.



⊕ The path in full

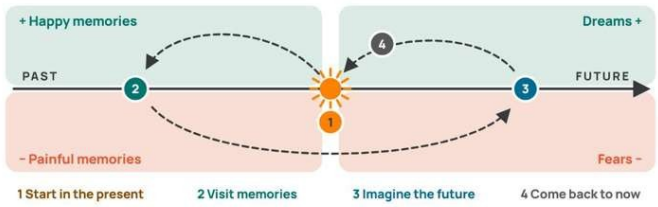
Slide 16

My notes

17

THE PATH OF EXPRESSION

Start in the present, visit the past, imagine the future.



Our own drawing, based on the path of expression from Sanders and Stappers.

⊕ Text version of this diagram

Slide 17

My notes

18

FIELD GUIDE METHODS, ONE LINE EACH

Every Field Guide method has a free Design Kit page.

Do: watch
Immersion · Analogous inspiration · Peers observing peers

Say: ask and show
Interview · Conversation starters · Card sort · Collage · Guided tour · Draw it · Resource flow

Make: examine
Secondary research

⊕ Every method in one line, with its Design Kit link

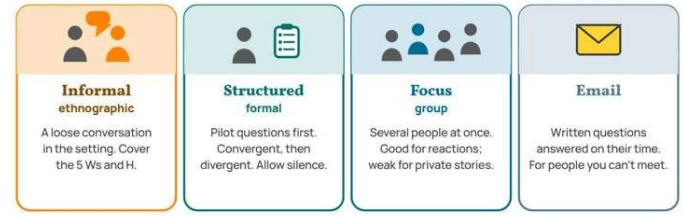
Slide 18

My notes

19

TYPES OF INTERVIEWS AND INFORMATION GATHERING

Pick the format that fits what you need to learn.



Our own drawing, based on the Class 3 slides.

⊕ Text version of this diagram

Slide 19

My notes

20

SAY VS. DO: WHY ONE METHOD IS NEVER ENOUGH

That gap is not a lie. It is an insight.

What people say and what they do often differ. A nurse may say she always uses the handoff sheet, while you watch her skip it at shift change. Pair a Say method with a Do method to find it, and check both against a record or artifact when you can.

⊕ Say vs. do: why one method is never enough

Slide 20

My notes

DEFINE YOUR AUDIENCE

Who will your ideas touch?

The Field Guide asks you to "consider the broad spectrum of people who will be touched by your ideas and solutions" (IDEO.org, *The Field Guide to Human-Centered Design*).

Name your needer group. These are the people who have the problem you are studying. Then add the people around them.

Think wider: Users | Non-users | Family | Front-line staff | Decision makers | Neighbors



Slide 21

My notes

22

SAMPLING: WHO TO LEARN FROM

Ten of one kind is one story.

The Field Guide's sampling advice is to talk with both extremes and mainstreams.

M **Mainstreams**
Show what most people face on a normal day.

E **Extremes**
Use the service far more, far less, or in an unusual way. Their needs are louder, so they are easier to see, and they often point to what everyone else feels quietly.

I **Insiders**
Staff, suppliers, experts. They see the system from behind the counter.

⊕ Sampling: extremes and mainstreams, and why ten of one kind is one story

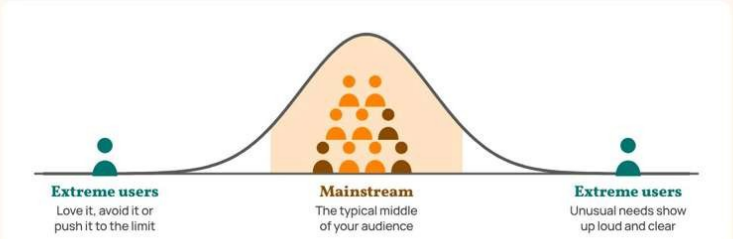
Slide 22

My notes

23

EXTREMES AND MAINSTREAMS

Talk to the middle and both ends.



Our own drawing, based on the extremes and mainstreams method in the HCD Field Guide.

⊕ Text version of this diagram

Slide 23

My notes

24

EXTREME USERS: WHAT THEY SHOW YOU

Louder feelings make the details easy to see.

SITUATION EXT 1	TRAIT EXT 2
A family flying with young children	Someone who is scared of flying
TRAIT EXT 3	TRAIT EXT 4
A traveler who uses wheelchair services	A visitor who doesn't speak the local language
HABIT EXT 5	SITUATION EXT 6
A commuter who flies every week	A passenger with a very short connection

⊕ Example: air travel. Why extremes help, and the source

Slide 24

My notes



25

WHO ARE YOUR EXTREME USERS?

Push each part of your project to the edge.

1. **List aspects.** Three to five. For air travel: time, money, comfort, language, luggage.
2. **Go to the edge.** For each aspect, who is extreme in it?
3. **Mix the kinds.** Lasting traits and passing situations.
4. **Add them to your sample.** A few extremes beside your mainstream conversations.

Slide 25

My notes



01

PLAN IT: METHODS BY STAGE AND YOUR RESEARCH PLAN

Generative research is not one method you use once.

Different methods fit different stages of human-centered design, and your interview team plans its fieldwork with a short reconnaissance first.

Slide 26

My notes

02

METHODS BY HCD STAGE

Each stage of the project calls for different methods.

1. **Inspiration · Classes 3 to 7**
   Your 10+ solid interviews.
2. **Interpretation · Class 8**
   Download and interpret (Part A).
3. **Ideation · Class 9**
   Brainstorm (Part B).
4. **Prototype and test · Classes 11 to 13**
   Prototype and feedback interviews with 7 to 10 people (Parts C and D).
5. **Implementation · Summer**
   Summer work and BUAD 497.

⊕ Core methods for each stage

Slide 27

My notes

03

RECONNAISSANCE: GET THE SCOOP BEFORE YOU GO OUT

Three questions to answer before fieldwork.

Reconnaissance is getting the scoop: reflect on your own beliefs, then learn the nature and context of your general idea.



Our own drawing, based on the reconnaissance step in Mills's action research text.

⊕ Text version of this diagram

Slide 28

My notes

04

WHY RECONNAISSANCE MATTERS

Your assumptions shape what you notice.

Write your working hypothesis, then pick methods that could prove it wrong.

Slide 29

My notes

05

THE ACTION RESEARCH PLAN, 1 OF 3: FOCUS

Write it, define it, question it.

With reconnaissance done, the action research plan turns your general idea into a study. It starts with focus.

STEP 1 · WRITE IT
An area-of-focus statement
Frame the design challenge and name the purpose of the study.

STEP 2 · DEFINE IT
The variables
A variable is a characteristic of your study that is subject to change.

STEP 3 · QUESTION IT
Research questions
Check that you have a workable way to proceed.

My notes

Slide 30



06

THE ACTION RESEARCH PLAN, 2 OF 3: CHANGE AND PEOPLE

What will you change, and who has the problem?

The intervention or innovation
What are you going to do to improve the situation you described?

The needer group
Who has the problem and will be involved? Explain why these members matter to the study's success. Consider mainstreams and extremes.

My notes

Slide 31

07

THE ACTION RESEARCH PLAN, 3 OF 3: MAKE IT HAPPEN

Clear the path, then put the plan into action.

Describe negotiations.
Head off obstacles to carrying out the plan.

Create a plan and timeline.
Decide who will do what, and when.

Build a team and a statement of resources.
List the materials and resources you need.

Develop data collection ideas.
A first statement of the kinds of data that could provide evidence.

Then put the plan into action: develop and carry out your data collection ideas. The next slide condenses the plan onto one page.

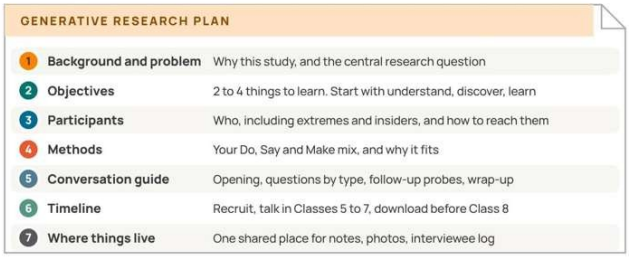
My notes

Slide 32

08

YOUR GENERATIVE RESEARCH PLAN

Put the whole plan on one page.



Our own drawing, following the research plan in Nikki Anderson-Stanier's dscout guide, in our own words.

⊕ Text version, and where this plan comes from

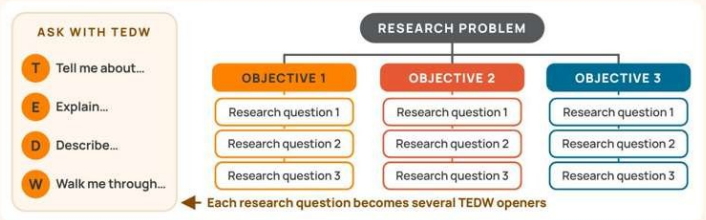
Slide 33

My notes

09

FROM RESEARCH PROBLEM TO QUESTIONS

One problem, a few objectives, many questions.



Our own drawing, based on the TEDW and powerful questions slide in the Class 3 deck.

⊕ Text version of this diagram

Slide 34

My notes

10

CAN YOU TRUST YOUR DATA?

Four checks for trustworthy data.

Validity
Are you learning what you think you are learning?

Reliability
In qualitative work this means consistency of technique.

Generalizability
A deep, accurate picture of the people you studied, not proof for everyone.

Triangulation
When what people say, what they do and what the records show point the same way, trust grows.

⊕ Can you trust your data? Validity, consistency and triangulation in plain terms

Slide 35

My notes

11

REALIGNING YOUR FOCUS

Let what you learn move your focus.

NEW DIRECTIONS ARE NORMAL

"This turned out to be more interesting."

Other directions may be more interesting, relevant or problematic. That's fine. Action research is iterate, iterate, iterate.

INTIMATE AND OPEN-ENDED

"We didn't expect that."

It is serendipitous. Expect surprises, and follow the ones that matter to the people you meet.

IT BENEFITS YOU AND OTHERS

"There's a better question here."

Realign when the people you meet show you a better question.

Slide 36

My notes

WHERE DID LEAD USERS AND THE REPERTORY GRID GO?

Hidden-need techniques moved to Class 10.

Lead users, the repertory grid and the other techniques for hidden needs now sit with need finding and jobs to be done in Class 10, after your interviews.

See Need Finding, Johari's Window and Jobs to Be Done.



Photo: Patrick Perkins on Unsplash

Slide 37

My notes