IB 407 · SLIDE NOTES

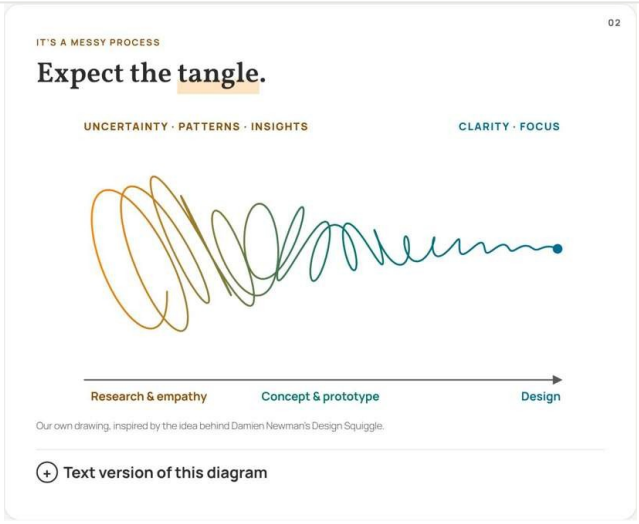
Empathy Fieldwork and Observation

Each slide is on the left. Type or write your notes on the right. https://julesmorrisphd.com/teaching/smith-gls/ib-407/empathy-fieldwork/



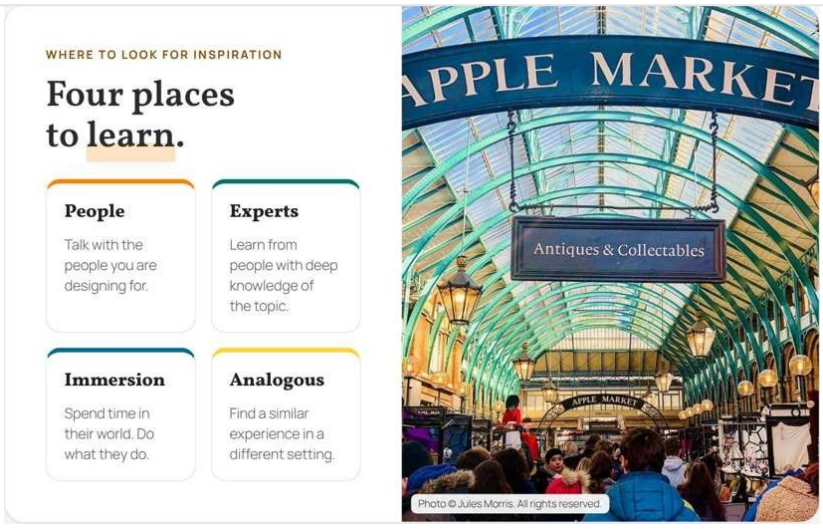
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My notes



Slide 2

My notes



Slide 3

My notes

04

IMMERSE, OBSERVE, ENGAGE

Three ways into someone else's experience.

1 Immerse

Experience what your user experiences. Ride the route, stand in the line, fill out the form.

You gain: you know how it feels, not just how it works.

2 Observe

Watch people in the context of their lives. Note what they do, not what you assume.

You gain: behavior people would never think to mention.

3 Engage

Talk with people, in planned interviews and quick "intercepts" on the spot.

You gain: stories, feelings and the "why" behind behavior.

Immerse, observe and engage come from the Stanford d.school Empathy Field Guide.

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05

DEFINE YOUR AUDIENCE

Consider everyone your ideas will touch.

Think about the broad spectrum of people who will be affected by your ideas and solutions, not just the obvious customer.

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06

EMPATHY FIELD GUIDE

Spend time with extreme users.

The Stanford d.school's Empathy Field Guide is full of ways to build empathy. One of the best: find the people at the edges, whose needs are amplified.

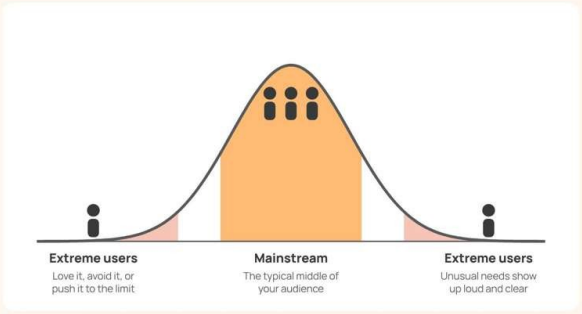
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07

WHO TO LEARN FROM

Extremes and mainstreams.



Our own drawing.

⊕ Text version of this diagram

Slide 7

My notes

EXTREME USERS

Who are your extreme users?

Extreme users' needs and feelings are amplified, so they notice what others miss.

- List 3 to 5 aspects of your project.
- For each, write a number of options for who is extreme in that aspect.
- Examples for travel: a family with young children, someone who uses a wheelchair, a first-time flyer, someone with a short layover, someone with oversized luggage.



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My notes

09

HUMAN-CENTERED LEADERSHIP'S 5 I'S OF EMPATHY

Five ways to build empathy.

Immersion
Live it.

Investigate
Ask, observe, dig.

Imagination
Picture their side.

Imitate
Try what they do.

Inquiry
Ask the next question.

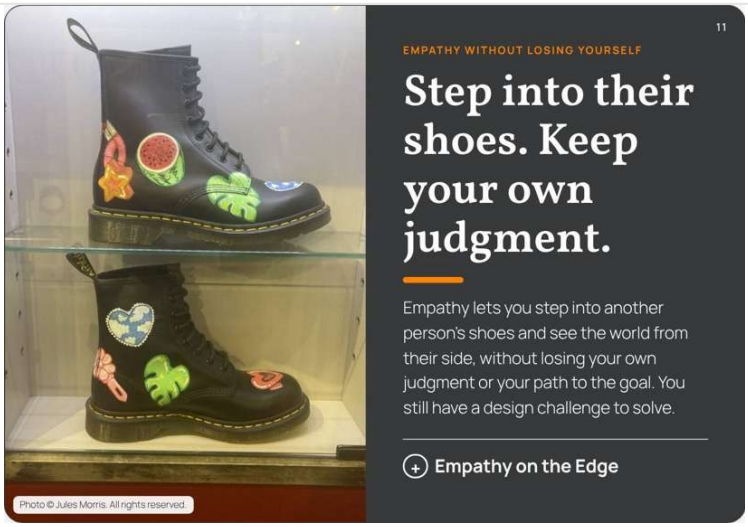
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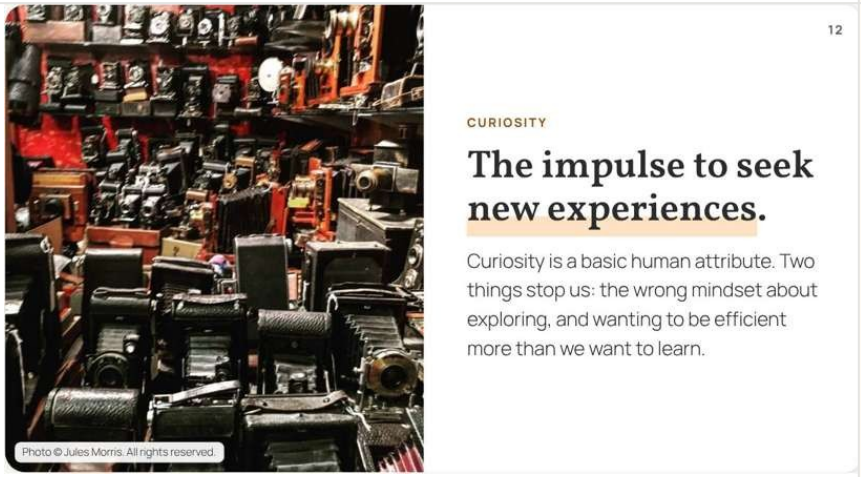
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My notes



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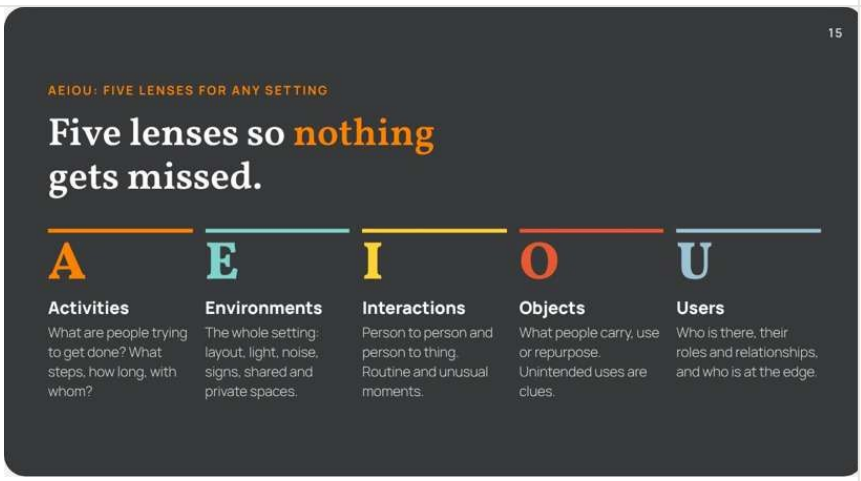
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My notes



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WHAT? HOW? WHY?: FROM FACTS TO MEANING

Start with what a camera sees. End with a question.

1 **What?**
What is the person doing? Only the facts a camera would catch.

2 **How?**
How are they doing it? Rushed, careful, frustrated, easy?

3 **Why?**
Why that way? Your best guess about motives. Every guess becomes a question to ask.

My notes

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17

RUN AN OBSERVATION

A 20-minute routine you can repeat at any site.

1. **Pick a spot.** Go where the activity happens, at a busy time. Say who you are if anyone asks.
2. **Split the lenses.** Each teammate owns one or two AEIOU lenses so nothing gets missed.
   A Activities · E Environments · I Interactions · O Objects · U Users
   Log it in the AEIOU Observation Logger ↓
3. **Write facts first.** "Leaves the line after 4 minutes," not "gets impatient." Add times, counts and positions.
4. **Mark guesses as guesses.** Put feelings and motives in a separate Why column and plan a question to test each one.
5. **Sketch the space.** A quick floor plan shows bottlenecks words miss.
6. **Compare notes right away.** Look for things that show up under more than one lens. Those are patterns.

⊕ Where AEIOU comes from

My notes

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ACTIVITY

What's in your bag?

Pair up. Take turns emptying your bag and explaining each thing. Ask about the story behind it, not just what it is. What does it reveal about how your partner lives?

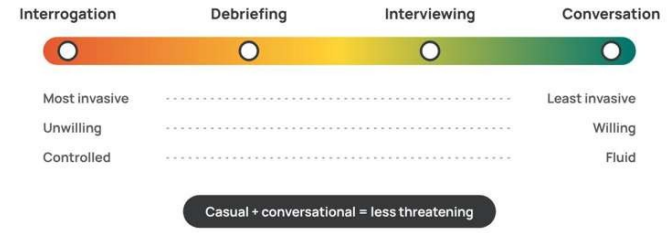
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INQUIRY: HUMAN ELICITATION

Conversations are purposeful intentions.



Our own drawing.

⊕ Text version of this diagram

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CASUAL LEARNING CONVERSATIONS + QUESTIONS

Questions unlock the story.



Our own drawing.

⊕ Text version of this diagram

Slide 20

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TEDW & POWERFUL QUESTIONS

Ask for experiences.

Each research problem breaks into objectives, and each objective into research questions you can ask this way.

Tell me about...
Invite a story.

Explain...
Ask how it works for them.

Describe...
Ask for the details.

Walk me through...
Follow the steps in order.

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PURSUIT OF A STORY

Life is a series of touchpoints and experiences.

- **Dreams** about an ideal touchpoint or experience
- **Insights:** a deeper understanding of something (ah-ha)
- **Needs (latent) and wants:** what's desirable to them
- **Mind the gaps:** shortcomings or design flaws
- **Thorny or wicked problems**
- **Pain points and bug lists:** fears, frustrations, anxieties, disappointments
- **Contradictions:** what doesn't make sense?



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EMPATHETIC LISTENING

Listen for what they say, do, think and feel.

Say
Their words and quotes.

Do
Their actions and behaviors.

Think
What they believe and worry about.

Feel
Their emotions.

Goals
What they are trying to get done.

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Photo by a London class student, used with permission.

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THE BASICS OF CASUAL LEARNING CONVERSATIONS

Empathetic listening transforms.

It is a skill you can learn. It unlocks someone's inner landscape. Practice all seven in every conversation.

- **Rapport** build trust
- **Presence** be genuine
- **Curiosity** ask to discover
- **Regard** respect, always
- **Purposeful** their point, not yours
- **Listen** to understand
- **Silence** let it work

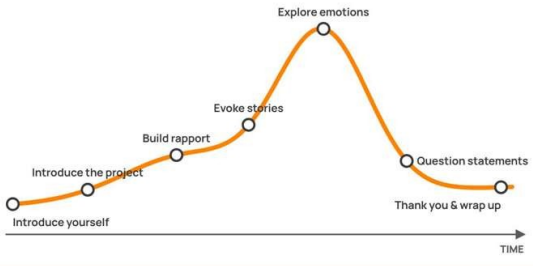
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THE CONVERSATION ARC

Build to emotion. Land gently.



Our own drawing.

⊕ Text version of this diagram

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HOW TO INTERVIEW

Have a conversation.

Adapted from the Stanford d.school's interview guidance.

Be human
Build rapport. Introduce yourself and the project in a friendly way.

Seek stories
Ask them to tell you about specific times.

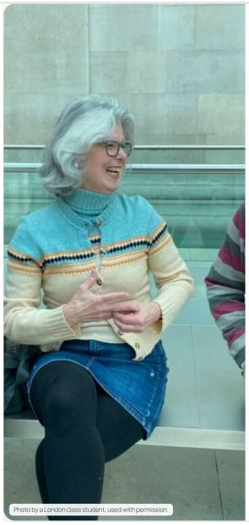
Talk about feelings
Ask how it felt, then follow the emotion.

Probe
Why? Can you tell me more? What were you thinking then?



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INTERVIEW FOR STORIES, NOT OPINIONS

Ask about a real moment, not an opinion.

- **Ask for stories.** "Tell me about the last time you..." beats "Do you like...?" Stories are about real past events, not guesses about the future.
- **Talk about feelings.** "What were you thinking at that point?" "How did you feel when that happened?"
- **Ask why, again.** Keep asking why, kindly, until you reach what matters to them. This is the 5 Whys method.
- **Stay quiet.** Do not fill pauses or suggest answers. Silence often brings the deepest answer.
- **Notice contradictions.** When what they say and what they do differ, ask about it gently. That gap is often the insight.
- **Watch the body.** Note tone, pauses and body language. Write down exact quotes.

⊕ The shape of a good interview

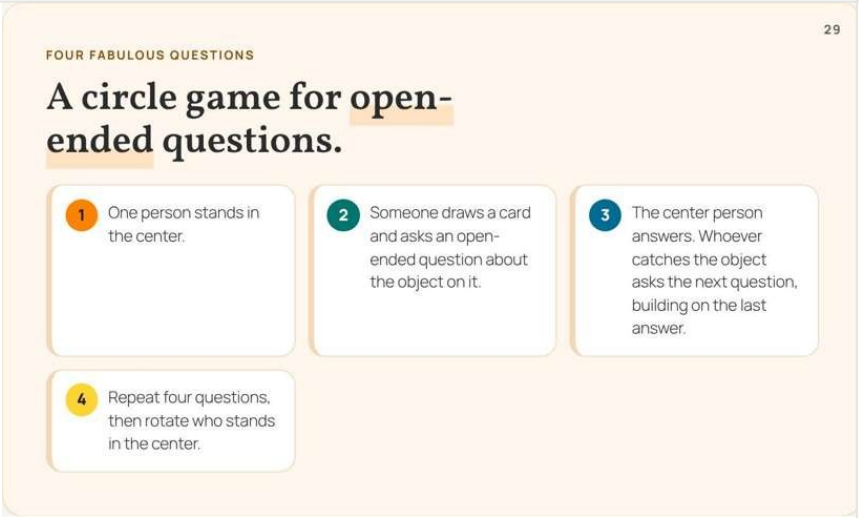
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OBSERVING WHAT PEOPLE DO

Six things to pin up before you go.

Cast aside your biases
Let people tell their own story. Listen and observe first.

Note contradictions
Between what people say and what they actually do.

Listen to personal stories
They reveal the unwritten rules people live by.

Watch for workarounds
The fixes people barely notice point to unmet needs.

Needs, not solutions
Start with a solution and you stop seeing.

Look beyond the obvious
The epiphanies hide in the small details.

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My notes



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CAPTURING AN INTERVIEW

Capture it while it's fresh.

Notes
Quotes, opportunities, ideas and insights, in their words.

Photos
Portrait, context and artifact (with permission).

Feelings
How they seemed to feel, and how you felt.

Do it in the next ten minutes, before the next interview blurs it.

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INTERVIEW PREPARATION

Go in ready.

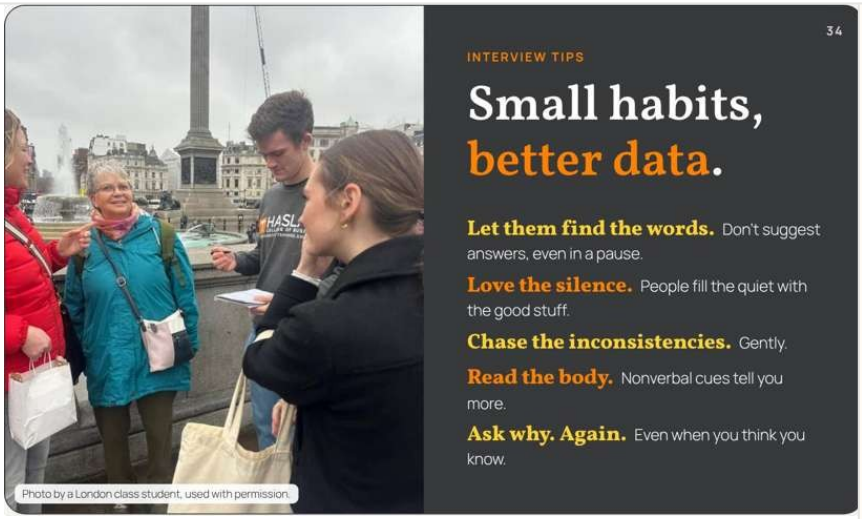


BEFORE YOU HIT THE STREET

- [x] **Brainstorm questions**
  Write lots as a team, then group them by topic.
- [x] **Sequence them**
  Start easy, build rapport, go deep, wrap up.
- [x] **Refine**
  Cut the yes or no questions. Make every one open-ended.
- [x] **Plan follow-ups**
  Have "Why?" and "Tell me more" ready.

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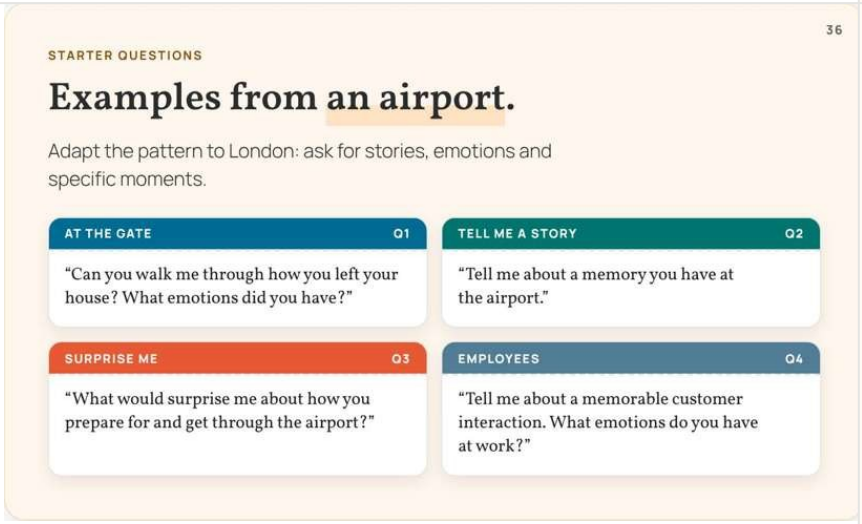
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WHAT TO CONSIDER AS YOU LEARN

Understand the whole person and the context.

The whole person
Listen for clues to their values, needs, desires and aspirations. How do they spend their time and money? They are the experts on their own lives.

The context
Meeting people where they are shows who they are, where they come from, and the challenges and workarounds they face.



Photo by a London class student, used with permission.

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FIELDWORK ETHICS

Respect the people who help you.

Be honest.
Introduce yourself truthfully. They can stop any time.

Ask first.
Before photos or video. Never children without a parent's OK.

Protect them.
First names or roles in notes, never full names.

Keep it out of AI.
No personal or identifying details in AI tools.

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THEODORE ROOSEVELT

"

People don't care how much you know until they know how much you care.

Often attributed to Theodore Roosevelt

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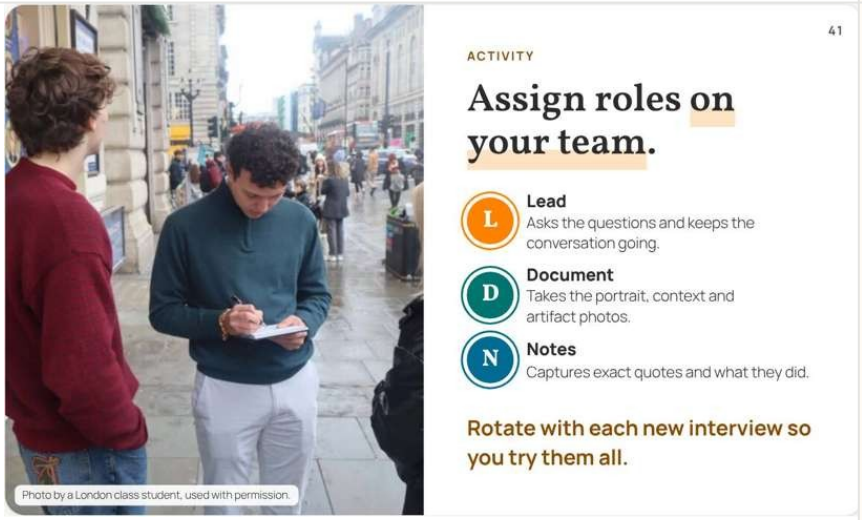
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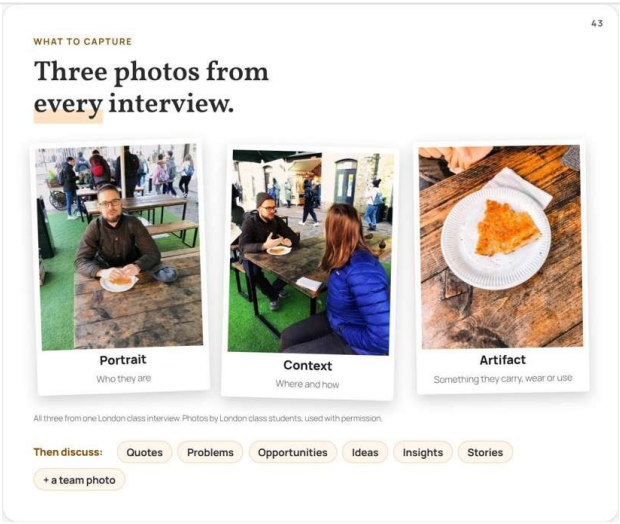
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