

Assignment Guide: Discovery Task – Observation



Summary

Conduct 1.5 to 2 hours of observation in the Problem Challenge or related/analogous context you are analyzing. Use one of the approaches described below. Consult with your instructor if you have questions about a suitable approach to take. You will take notes during your observation experience using the note-taking methods explained in the **Taking Field Notes** Assignment Guide in order to a) make **descriptive** notes about what you are seeing and hearing and b) record your thoughts, questions, ideas for subsequent reflection and analysis.

Report

Write up an APA-formatted report, 3-4 pages (excluding title page, references, and appendices), **in Microsoft Word format using 12-point, Times or Times New Roman font, sectioned as follows:**

- 1) **Introduction: Craft a brief introduction, paraphrasing the problem upon which you are focused.** Be sure to identify the observation approach you are using. It may be one or two of the IDEO methods below, or some other approach. Provide sufficient context or background to frame the problem situation that you have selected.
- 2) **Description: Synthesize the main observations you made – the most interesting things you saw and heard.** This can be brief (aim for 1/3 or less of your paper) and you only want to highlight the most key, interesting, relevant observations that you made; do not summarize everything you saw and heard, as that would require many more pages.
- 3) **Analysis: Use the remainder of your paper to state and explain the key insights and conclusions from your observation.** This is where you move from describing what you saw to interpreting and analyzing what it means for you and for your understanding of the problem space. Use this section to reflect on and address questions such as: What did you learn about your problem situation from this

exercise? What insights did you derive regarding your stakeholders? What ideas did this generate about underlying causes or possible solutions? To help you further focus on the stakeholders in your problem situation and on their needs and aspirations, consider thinking about the questions that Dyer, Gregersen and Christensen (2011), pose in “Understanding the Job to Be Done” (pp. 93-94) and “Ten Questions to Ask While Observing Customers” (pp. 100-101). You don’t have to answer any or all of the questions, but reflect on them to see if they provide insight or direction for your thinking:

- a. What are people in the problem scenario trying to accomplish?
- b. What are the functional, social, emotional goals/aspects of the task?
- c. What steps are involved in the task? Which is most critical?
- d. Is there a way to make the job/task more efficient?
- e. What are the costs (time or money) involved in accomplishing the task?
- f. What frustrates people most when trying to get the task done?
- g. Where do the participants appear to need the most help?
- h. How are the participants working around challenging parts of the task?
- i. Are the participants doing something that seems counterproductive?
- j. Is there anything surprising about the stakeholders or the process?

Field-notes: Include actual field-notes as an appendix in the document. If you took notes on a computer or tablet, you can simply cut and paste them digitally, but if you took notes by hand, then you will need to scan and insert the image of your hand-written notes into the document. If you have other items like photos, drawings, artifacts you collected, scan and include those in the Appendix. Refer to the **Taking Field Notes** Assignment Guide. **Be sure to submit ONE document that includes the field notes.**

What to Do

The overarching guideline for this assignment is to try a new way to create space to observe people and activities involved in your problem space. In some cases, you may decide to observe a different context, but one that is related or analogous to your own – see #4 below. Remember that in order to generate new ideas, you have to get new input – and being an artful observer is one way to do that.

The following are four approaches to consider, which are borrowed from the IDEO organization. These are ways that IDEO consultants get out and collect real data to inform a problem they are working on. Think about each approach and decide which is most suitable for your problem context and the most interesting and promising in terms of gaining insights into your problem space. You may also decide to carry out two of these approaches or come up with another approach. If you need assistance, be sure to discuss with your instructor.

Here are four of IDEO’s methods. Select an approach and adapt it to your context.

1. **“Be an anthropologist”** – For this you would find an opportunity – or multiple opportunities – to observe the people involved in the problem situation you are analyzing. The goal of an anthropologist is to watch and listen to a social activity while it’s taking place and take careful descriptive notes about what’s going on

and what the participants do and say. The point of observing a situation is to become a firsthand eyewitness to the events – to see the behaviors and actions for yourself.

2. **“Walk in their shoes”** – For this you would place yourself into the role of a key stakeholder in order to experience firsthand what the problem situation is all about. For example, an IDEO researcher that was working on more efficient ways to organize an emergency room (ER) actually checked himself in to the ER anonymously and filmed the entire experience with a head-cam. Through this experience he generated tons of data and was able to generate insights into what it’s like to be a key stakeholder in this environment.
3. **“Observe extremes”** – For this approach, you would identify a stakeholder who is an “outlier” in the problem space you are analyzing. These is someone who does not fit the norm, but who instead has overachieved and surmounted the problem in some way; OR, oppositely, this could be someone who is disproportionately affected by the problem. For example, an IDEO team that was working on the redesign of a grocery store layout decided to shadow an “extreme couponer,” in the assumption that they would have valuable insights about navigating a grocery store and solutions to some of the most pertinent obstacles or problems that shoppers face.
4. **“Study analogous settings”** – Your problem situation probably has a corollary in another context – another organization, field, discipline, sector, etc. For this approach, you would need to find an analogous setting (even if it seems remote – in fact, more remote is good from what we know about cognitive associating) and go and observe it. This approach could be especially useful if you are analyzing a situation that is sensitive or where you feel that trying to insert yourself as a participant or even observing from the periphery would be intrusive or inappropriate. As an example of this approach, we can return to the IDEO case of solving the ER problem above. To generate insights about the problem, the team decided to observe a pit crew at a local racetrack, with the idea that a pit crew has to operate with a similar level of intensity and complexity as an ER. By observing the pit crew at work, they collected several interesting insights that they could apply (for instance that every pit crew assigns one person who doesn’t do anything but monitor all of the activity and communicate with the driver).