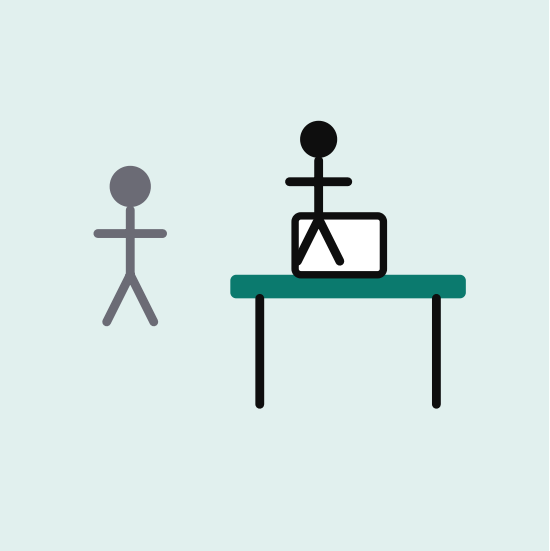
Method

Contextual inquiry

A method in which people are observed and asked questions while they carry out their tasks in their own setting, like an apprentice beside a master.



In Spanish

Indagación contextual

Origin

Whiteside, Bennett and Holtzblatt (1988); systematized by Beyer and Holtzblatt (1998)

Output

Notes on how a person works in their setting, and why

What it's for

Discovering how things are really done, including the details no one would mention in an interview.

Key elements

Context

Go where the person works and watch them work.

Partnership

The person is the expert; the researcher learns as an apprentice.

Interpretation

Check your understanding with the person as you go.

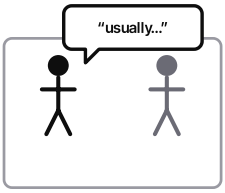
Focus

Go with a clear purpose and test your assumptions.

An example

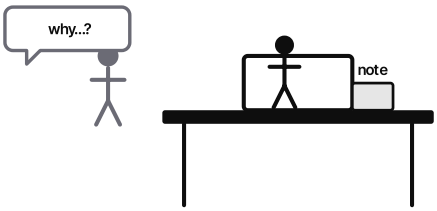
Two ways to understand how staff at a bank branch work.

In a meeting room



They are asked how they serve a customer. **They describe the ideal process.**

At their desk



They are accompanied while they serve customers and asked questions at key moments. **The shortcuts and paper notes appear.**

In their context, people show tricks and problems they take for granted and would never mention.

How it's done

1

You accompany the person while they do their real work.

2

You ask in the moment, without interrupting too much.

3

You interpret with them what you have observed.

Applications in design

When to use it

To understand a job or a task as it is really done, where it happens.

Avoid

Turning it into a sit-down interview far from where everything happens: ask the person to show you how they do it, as if you were going to learn their job.

Don't fall for it

Notice the papers, notes and shortcuts they have created: they reveal what the system doesn't solve.

Connections

Builds on

- Anthropology
- Say vs. do

Used by

- Systemic design
- Design research

Related to

- Go-along
- Hierarchical task analysis (HTA)
- Bodystorming
- Contextual Design
- In-depth interview
- Ethnography
- Shadowing

Authors and works

1988	**John Whiteside, John Bennett and Karen Holtzblatt**	First introduced it in an account of their usability engineering work.
1998	**Hugh Beyer and Karen Holtzblatt**	Systematized it, with its four principles, in Contextual Design.

Sources

Original sources

- Whiteside, J., Bennett, J., & Holtzblatt, K. (1988). Usability engineering: Our experience and evolution. In M. Helander (Ed.), Handbook of human-computer interaction. North-Holland.
- Beyer, H., & Holtzblatt, K. (1998). Contextual design: Defining customer-centered systems. Morgan Kaufmann.

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