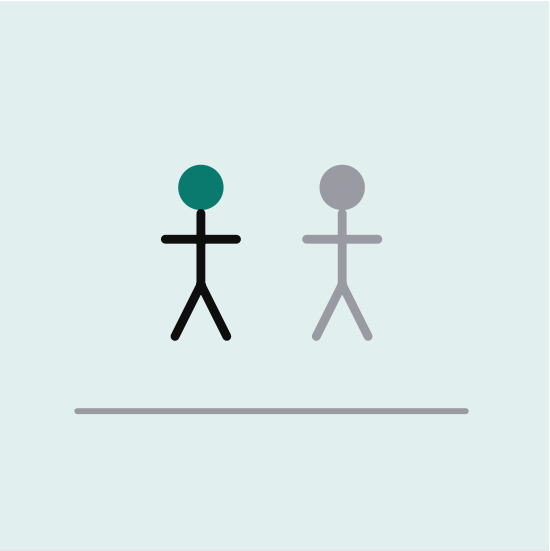
Method

Shadowing

An observation method in which you accompany a person for a period, like their shadow, to see what they do, with whom, and why.



Origin
Qualitative organizational research (McDonald, 2005)

Output
Notes on a person's complete routine

What it's for

Understanding complete routines and what happens between one task and another, which is almost never told.

Key elements

With everyone's consent
Including the people the person you shadow deals with, who should know what you are doing there.

Observe without intervening
Giving opinions or helping changes what the person does.

The whole routine
What happens between one task and the next matters too.

An example

Imagine you want to understand a nurse's day.

An interview



10 min

She sums up her day in ten minutes. **You see the main points.**

A day of shadowing



a full shift

You accompany her for a shift and see the interruptions, the walking back and forth, and the improvising. **You see the real day.**

Accompanying someone for hours reveals what the person does not remember or does not consider important to tell.

How it's done

1 

Agree with the person when and for how long to accompany them.

2 

Observe and note what they do, with whom, and where.

3 

Ask afterward about what was not clear.

Applications in design

When to use it

To see someone's day-to-day, whether they use a service or provide it, especially when what they do is hard to describe.

Avoid

Intervening or giving opinions while you observe: it changes what the person does.

Don't fall for it

One day is just one day: shadow at different times or several people before generalizing.

Connections

Builds on

- Say vs. do

Used by

- Service design
- Design for health
- Social design
- Service design research

Related to

- Go-along
- Hierarchical task analysis (HTA)
- Ethnography
- Contextual inquiry
- Service safari

Authors and works

2005	**Seonaidh McDonald**	Described shadowing as a qualitative method for studying actions in context.
2010	**Marc Stickdorn and Jakob Schneider**	Included it among the tools of service design.

Sources

Original sources

- McDonald, S. (2005). Studying actions in context: A qualitative shadowing method for organizational research. Qualitative Research, 5(4), 455–473. View source (https://doi.org/10.1177/1468794105056923)

Secondary sources

- Stickdorn, M., & Schneider, J. (Eds.) (2010). This is service design thinking: Basics, tools, cases. BIS Publishers.

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