Record insights from in-person observation

Learn more about the people who use a service by observing them interact with it.

## How to use this template

You can use this template for:

* noting key observations and recording your notes
* Informally gaining insights and perspectives on areas for improvement or guiding directions for change

Activities you can consider include:

* If you have an in-person service point, you could watch interactions
* utilising public computer areas to observe people engaging with your digital services
* engaging directly with individuals to understand their experience

### Tips

You should:

* prepare, as you’ll be interacting with people
* make it clear what you’re doing and who you work for
* consider small incentives to encourage participation, such as wrapped chocolates
* respect privacy and make sure people can choose to opt out
* consider safeguarding and what to do if service users are vulnerable or distressed
* do not observe without permission
* when observing, make sure you do not see or record personal details or passwords
* when interviewing, ask people not to disclose personal information
* ask more open questions, such as “What..? How..?” and fewer closed questions with yes or no answers, such as “Do..? Did..?”
* focus on learning about people and problems. Solutions can be explored later
* when interviewing, set a time limit and keep focus on the research topic
* know where to signpost people who need help with a service or to make a complaint
* be cautious with sensitive services and questions

## Before you start

### Define your research goals

Think about what you want to learn. What do you want to achieve with your research? What are your key questions about your project? Who might be the key users? Who is experiencing the problem you want to solve? Who would be affected by any ideas for solutions?

#### Goal 1

*For example, where in their journey do people get stuck?*

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#### Goal 2

*For example, what do people need to do? Do they understand what happens next?*

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#### Goal 3

*For example, are there common problems across different tasks or services?*

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### Define your questions

If you're going to speak with people as well as observing, it's good to have some questions ready.

#### Question 1

*For example, if you could change one thing about this service, what would it be?*

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#### Question 2

*For example, if you could keep anything as it is, what would it be?*

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#### Question 3

*For example, how would you describe this service to a friend?*

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#### Question 4

*For example, tell me about when you've had a good experience with a council service? What made it good for you?*

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#### Question 5

*For example, tell me about when you've had a bad experience with a council service? What made it bad for you?*

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#### Question 6

*For example, can you tell me about your previous experience with this service (or organisation)?*

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## Your observation notes

Things to watch out for:

* what questions do people ask while using the service?
* how long does it take to use the service from start to end?
* how many mistakes do people make?
* were people able to do everything they needed?
* when do people need help?
* what type of help do people need?
* when did people get stressed, confused, or annoyed when using the service? Why were they feeling this way?

### Notes

| **User group** | **Service** | **Task** | **Observations** | | | |
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### Quotes

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### Additional general notes

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## Your interview notes

### Person 1

| **User group** |  | | | | | |
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| **Service** |  | | | | | |
| **Task** |  | | | | | |
| **Question 1** |  | | | | | |
| **Question 2** |  | | | | | |
| **Question 3** |  | | | | | |
| **Question 4** |  | | | | | |

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### Person 2

| **User group** |  | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Service** |  | | | | | |
| **Task** |  | | | | | |
| **Question 1** |  | | | | | |
| **Question 2** |  | | | | | |
| **Question 3** |  | | | | | |
| **Question 4** |  | | | | | |

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### Person 3

| **User group** |  | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Service** |  | | | | | |
| **Task** |  | | | | | |
| **Question 1** |  | | | | | |
| **Question 2** |  | | | | | |
| **Question 3** |  | | | | | |
| **Question 4** |  | | | | | |

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### Person 4

| **User group** |  | | | | | |
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| **Service** |  | | | | | |
| **Task** |  | | | | | |
| **Question 1** |  | | | | | |
| **Question 2** |  | | | | | |
| **Question 3** |  | | | | | |
| **Question 4** |  | | | | | |

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### Person 5

| **User group** |  | | | | | |
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| **Service** |  | | | | | |
| **Task** |  | | | | | |
| **Question 1** |  | | | | | |
| **Question 2** |  | | | | | |
| **Question 3** |  | | | | | |
| **Question 4** |  | | | | | |

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### Person 6

| **User group** |  | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Service** |  | | | | | |
| **Task** |  | | | | | |
| **Question 1** |  | | | | | |
| **Question 2** |  | | | | | |
| **Question 3** |  | | | | | |
| **Question 4** |  | | | | | |

Copy and paste a table if you speak with more than 6 people.

## Organise your insights

Review your notes and organise them into themes. For example, by:

* user group
* related root causes
* type of problem
* pain points
* opportunities for improvement

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