# Remote Contextual Design

### **Requirements and Design in the Pandemic**



Karen Holtzblatt, CEO @kholtzblatt karen@incontextdesign.com



# Necessity is the Mother of Invention

## And our tools are SO much better

### Start with the standard techniques



You run interviews and working meetings the same way

With a remote twist

#### The teamwork is the same

• With more structure in the meetings

Simultaneous collaboration tools are a must

- And everyone needs to have them
- Including the customer

### Key tools to get and use

#### Video meeting tools like Zoom

- That can be used for hours
- Work with up to 15 log-ins that don't degrade
- Shared by team members and customers alike worldwide

Simultaneous Collaboration Tools like these or the equivalent

- Google docs, sheets, and slides
- Miro a collaborative whiteboard
- Figma for prototyping

Multiple tech tools

- Computer phone tablet stylus or pen for tablet
- Expect to have more than one device logged in per person
- Big screens will help

#### Use any tool with the same functions!

### **Contextual Design**

| SUC           | 1 | Contextual Inquiry            |  |  |  |  |  |  |  |
|---------------|---|-------------------------------|--|--|--|--|--|--|--|
| Intic         | I |                               | Talk to your customers in the field                                |  |  |  |  |  |  |
| So            | 0 |                               |  |  |  |  |  |  |  |
| s<br>S        | 2 | Interpretation Session        | Interpret the data as a team to capture key issues and activities  |  |  |  |  |  |  |
| Jent          |   | Experience Models &           |  |  |  |  |  |  |  |
| quiren        | 3 | Affinity Diagramming          | Consolidate data across customers for a full market view           |  |  |  |  |  |  |
| Re            | 4 | Visioning & Cool Drilldown    |  |  |  |  |  |  |  |
|               |   |                               | Generate new products & the next product concepts steeped in data  |  |  |  |  |  |  |
|               | 5 | Storyboards                   |  |  |  |  |  |  |  |
| epts          |   | letter y bear de              | Nork out the details of particular tasks and roles                 |  |  |  |  |  |  |
| onc           |   | Interaction Patterns &        |  |  |  |  |  |  |  |
| ate C         | 6 | User Environment Design       | Define system structure, function, content and user interaction    |  |  |  |  |  |  |
| alid          | 7 | Dener Dreteture Interviewe    |  |  |  |  |  |  |  |
| <b>ა</b><br>ა | ( | Paper Prototype Interviews    | Mock up the interface to validate direction and UI with customers  |  |  |  |  |  |  |
| șfin,         | Q |                               |  |  |  |  |  |  |  |
| D             | ð | visual Design & Agile Stories | Design and test the final look; base stories on validated function |  |  |  |  |  |  |

### Research & design is a series of working meetings

Meetings work best when they have

- Clear goals and a well-defined sequence of activities
- An artifact all can see when co-creating
- Clear criteria for goodness
- A small number of people participating, so everyone has
  - A job to do, enough airtime, and no one is waiting around bored
- Facilitators when there are more than 3 people
  - To ensure the process is followed and everyone is heard
- An agreed upon way to take turns or be heard with > 3 people

Remote meetings work best with

Structure and Patience

#### Issues of diversity are helped by remote structured processes

# Everyone involved needs the right tools

Start together before you work asynchronously



# practice – experiment – learn

# Find what works best for you

Project Planning

# All guidelines are the same

# But keep it tight and focused

### Plan small

Do what is critical to the business now

- Enhancing an existing tool, website, app, process with a focused purpose
- Exploring a new role you know matters or an adjacent process with your users
- Exploring a new market one role at a time with rolling integration

What is small? 6-8 users with

- 1-2 job types looking at a common activity
- Working in 1 2 work/consumer contexts or company/lifestyle types
- Balance gender and age as relevant to the business target

Want something bigger? Plan rolling mini-projects

- Interview, interpret and consolidate in chunks
- Vision and start some design components to get feedback on
- Do another role or two and integrate the data
  - Or do different ages and contexts in each round
- Vision again and adjust and repeat

### Its all Agile now!

### Who can you interview?

What users can you study?

- Who has time on their hands now and might be willing to work with you?
- Given the scope, can you "see" the work or activity in Zoom?
- Or by walking around with a phone in Zoom to show things

What context can you explore?

- On-line anything if they are willing
  - Tool based business work, teaching, teamwork, anything done together via "Zoom"
- Work done in a home office that is similar to what they do at work
- Home based activities: electronics, appliances, cooking, bill paying
- Manufacturing or warehouse activities that will agree to walk you around

#### Keep it scoped and focused enough to be useful

### What models should you use?

#### Recommendation for use are the same but...

#### Always build an affinity diagram

Use 1-2 models – have a good reason for doing 3

Pick the most important models for the problem

Model usefulness depends on the project scope & the impact of remote activity

- Sequence model to map a task when you don't know the steps from previous work
  - Or to look at low level glitches in the task
- Identity model will characterize the market even when people are remote
  - Or build personas or map new data to your existing personal
- Collaboration Model can be useful if on-line work parallels in-person
  - Or it will give you a new perspective
- Bigger picture models will likely be less worthwhile
  - Day-in-the Life to see how different spaces, devices, or times of days are used but it will be constrained
  - Journey Map for a larger process if all the activities still can be done through on-line and phone.

#### Interviews, notes, and an affinity might be enough for now

Contextual Inquiry "Field" Interviews & Mock-up Testing

### Same principles & structure to run the interview

#### Context

- Go to your user
- Talk to your users while they do life

#### Partnership

- Help users articulate their activity practice
- Let them lead

#### Interpretation

- Create a shared understanding
- Draw out the implications

#### Focus

- Know your purpose
- Challenge your assumptions



#### You are still an apprentice – using video & phone to "see"

### Only context changes

Consumer and office style work can be understood if

- It is typically done with computer-based tools that can be displayed
- But now "dropping in" may be by phone, text, Slack... so be sure it is considered
- In-home studies of electronics or appliances can be "seen"
  - Use the phone to "show" you the home, kitchen layout, wires behind, family activities
  - Have them send photos
- Manufacturing or warehouse style work can be "seen" if
  - Some work is in a tool that can be shared
  - Use the phone to "show" you the layout, machinery, forms...
  - Have them send photos and screen captures
  - For IT systems: Consider an "on-site" partner who already is there and knows the work to walk around with the interviewee

#### Issues of security, IP, PI are the same

### **Remote tips**

Everything will be slower: Probe & ask more

- You will cover less in the interview don't make it longer!
- Keep the interview scope small look at only 1-2 activities
- Walking with video: Slow them down when they walk around
  - Or everything will blur
- Be sure you can see their world:
  - Make sure the screen is big enough get them to enlarge
  - Or see if they will screen capture and send it to you
  - They can log in with their tablet or phone at the same time so you can see it all in Zoom
  - They can text photos too!

### What about mock-up interviews?

### Same process as in person – Just do it in Zoom & your drawing tool

- Depending on level of fidelity
- Miro for hand drawn
- Figma or Sketch for wireframes and rough UI's
- Figma and InVision for detailed design or have some interactivity
- Let them pretend to do their real work task
- Make changes on the fly
  - Respond to the user's reaction and needs

| 🛄 Apps ★ Bookmarks 🔇                                | BB Card                                      |   |   |  | •* • •                |
|---|--|---|---|--|-----------------------|
| ≡ <mark>⊳                                   </mark> | ¢γΤΦΩ  |   | WIREFRAMES / CarePlus ~                               |  | N Share D A?          |
| Layers Assets Dashbox                               | Wireframe Dashboard                          | Wireframe Customize                                     | Wireframe Customize Wi                                | ireframe Customize Wireframe Dashboard | Design Prototype Code |
| Pages   | + "22"                                       |   | 12.22 +   |  | Background            |
| <ul> <li>Dashboard</li> </ul>                       | ACTION REQUIRED                              | CUSTOMIZE   | CUSTOMIZE   | CUSTOMIZE DASHBOARD                    |                       |
| Timeline  | Rivsatigmin not taken at 10:00               | Add the widgets to show on your<br>m dashboard overview | Add the widgets to show on your<br>dashboard overview | 12:22 7                                | al 🗢 🔳                |
| Routine Builder                                     | Renind Call                                  | Upcoming Tests ==                                       | Upcoming Tasks =                                      |  |                       |
| Settings  | UPCOMING TASKS<br>Medicines Coloniamine 125  | Carrent Location  | Current Location                                      |  |                       |
| Navigation  | Calibertar 21<br>CURRENT LOCATION            | Wedcarion Taken   | Medication Taken                                      | DASHD                                  | UARD                  |
| Group 3   | *  | Other Gareporters                                       | Cther Gare partners                                   |  |                       |
| $\mathbb{T}$ mockup the contacts screen f           | OF CO Stand Statesta                         | Done  | Done  | ACTION RE                              | QUIRED 🤡              |
| # Wireframe Dashboard                               | Ling from Alexa                              | teles .   |   |  |                       |
| image 1   |  | = • • • =   |   | Rivastigmin not tak                    | (en at 10:00 am       |
| T Location: 4130 Campus D                           | *  |   |   | nivastiginii not tak                   | ch at 10.00 am        |
|   | Call Screen 1                                | Calling Screen  | Calling Screen  |  | 0.11                  |
| T View in maps                                      | > <sub>&gt;ye</sub> t 12.02.≠<br>Call Mother |   | 12.22 * **  | Remind                                 | Call                  |
| - Line 10   | and a  |   | Mother:<br>+1 (334)-243-1155                          |  |                       |
| — Line 9  | 2 <sub>225</sub><br>Phone: +1 (236) 343-1155 | CALLING   |   | • • •                                  |                       |
| T 9:00 AM   | >yrc<  |   | 00-00   |  |                       |
| T 9:00 AM   | here's                                       | Mother:<br>+1 (334)-243-1155                            | 00:00   | UPCOMING                               | TASKS                 |
| T Exelon (rivastigmine)                             | 274 L  |   |   | Medicines: Galantamine                 | 12:00 PM              |
| T Aricept (donepezil)                               | 2745   |   | 0 0   | Call Doctor                            | 2:00 PM               |
| T activity  | 274  | 6 0   |   | our postor                             | 2.001 11              |
| ⊐ Rectangle 10                                      | Press.                                       |   |   |  |                       |
| Calling Screen                                      |  |   |   | CURRENT LC                             | CATION                |
| Create v  | wirefran                                     | nes in Fig  | ma  | Prov                                   |                       |
|   |  |   |   | ACTIVE DE                              | VICES                 |
| Test on   | the nho                                      | no or nla   | tform   | Sharon's Smartwatch                    | 50%                   |
|   |  |   |   |  |                       |

Customize Dashboard

 $( \mathbf{P} )$ 

 $\odot$ 

#### Services like Usertesting.com can help

with interactivity

### When this is over!

# Get back in the Field

Best practice is to start in person with 6-8 people Then go remote if you have to

# Interpretation Sessions Capturing notes & models

### Interpretation is the same

A structured meeting capturing the data from one field interview

- Interpret an interview as a group
  - Two to three people for notes and one model
  - Four people if multiple models
- Complete within 48 hours of the interview 24 is better
- Focused *only* on one interview at a time

Assign roles:

- Interviewer tells story of the interview
- Notetaker captures important observations online as notes
- Modelers draws models
  - Steps for sequences as usual fill in templates for new models
- Participants ask questions, identify what to capture, generate implications
- Facilitator manages the meeting

### Only now you are on-line in a collaborative remote tool!

### **Remote tips: Process**

Use video to see each other

#### Keep the team small

- Depending on models 2-4 people to an interpretation session
- Switch up participants across interviews

#### Interviewer tells the story in order

 Participants ask for clarification or share design ideas

### Notetaker captures the data in Google docs or sheets

- Sheets is better for Affinity building
- But you can't see the note until they press enter

#### Keep data for 1 user in a single Gsheet using the tabs

| Ħ  | Travel Ex  | ample ☆ 🖻<br>View Insert Format Data Tools Add-ons Help All  | change | es sa | ved | in Dri |  |
|----|--|--|--------|-------|-----|--------|--|
|    |  | 100% - \$ % .0 .00 123 Default (Ari 10   | •      | B     | T   | ÷.     |  |
| fx |  |  |        | -     | -   |        |  |
|    | A  | В  |        | С     |     |        |  |
| 1  |  |  |        |       |     |        |  |
| 2  | Editor for a medical information company: 32, female, traels with<br>her boyfriend, a web developer. Devices; Android smartphone,<br>iPad, iPod. Takes a work Windows laptop home. Apps: gChat<br>gDors_EB_AirBnB_Vein_gMaps |  |        |       |     |        |  |
| 3  | Interviewer  | Karen  |        |       |     |        |  |
| 4  | Inperp<br>participants   | David, Hugh, Shelley   |        |       |     |        |  |
| 5  |  |  |        |       |     |        |  |
| б  |  |  |        |       |     |        |  |
| 7  | Note Number  | Interview Notes (separate note for each idea/insight)  |        |       |     |        |  |
| 8  | U1-1   | Kept prices of hotel and car options in a paper notebook.  |        |       |     |        |  |
| 9  | U1-2   | Knows prices change over time, so she searches at all different<br>times of the day and days of the weeek looking for the best dea |        |       |     |        |  |
| 10 | U1-3   | When she books a trip to a city where she knows someone she emails them to ask if she got a good deal for that area                |        |       |     |        |  |
| 11 |  |  |        |       |     |        |  |
| 12 |  |  |        |       |     |        |  |
| 13 |  |  |        |       |     |        |  |
| 14 |  |  |        |       |     |        |  |
| 15 |  |  |        |       |     |        |  |

**Notes in Sheets** 

### Some models can be captured in text

#### Assign a different person to each model

Everyone scans models captured for accuracy

 Tell the group if you are making a change or ask for it

Models

- Sequence model type the steps in order linearly as usual
- Identity Use columns to capture quotes related to I do, I am, I like or other relevant experiences
- Day-in-life Use columns for quotes and observations for at Home, On the Way, Work, In the world and other relevant segments

#### Sequence Model in Sheets

| ■ Travel Example ☆ ⊡<br>File Edit View Insert Format Data Tools Add-ons Help <u>All changes saved in Drive</u> |   |  |          |   |   |  |  |  |  |  |  |
|--|---|--|----------|---|---|--|--|--|--|--|--|
| 1  | C   |  |          |   |   |  |  |  |  |  |  |
| fx   |   |  |          |   |   |  |  |  |  |  |  |
|  | А   | В  | С        | D   | E   |  |  |  |  |  |  |
| 1  | U06 Sequence<br>1: Plan a trip              |  |          | U06 Sequence<br>2: Plan outings                                 |   |  |  |  |  |  |  |
| 2  | 1   | Trigger: Decided to give wife a family trip for her birthday                             |          | 1   | Trigger: picked accomodations                 |  |  |  |  |  |  |
| 3  | 2   | Ask wife if she wants to go to a new hotel in their usual place, she agrees              |          | Using GMaps looks<br>for points of interest<br>around the hotel |   |  |  |  |  |  |  |
| 4  | 3   | At home desktop researches places with GMaps   |          | 3   | Goes to the website<br>for interesting places |  |  |  |  |  |  |
| 5  | 4   | Starts search at their usual place destination looking for hotels and places of interest |          | 4   |   |  |  |  |  |  |  |
| 6  | 5   | Sees a condonot a hotel  |          | 5   |   |  |  |  |  |  |  |
| 7  | 6   | Does a wider search for condos   |          |   |   |  |  |  |  |  |  |
| 8  | 7   | Sees something that looks good   |          |   |   |  |  |  |  |  |  |
| 9  |   |  |          |   |   |  |  |  |  |  |  |
| 10   |   |  |          |   |   |  |  |  |  |  |  |
| 11   |   |  |          |   |   |  |  |  |  |  |  |
| 12   |   |  |          |   |   |  |  |  |  |  |  |
| 13   |   |  |          |   |   |  |  |  |  |  |  |
| 14   |   |  |          |   |   |  |  |  |  |  |  |
| 15   |   |  |          |   |   |  |  |  |  |  |  |
|  | + ≣ N                                       | Sequence - Identity - DIL -  | Sheet5 👻 |   |   |  |  |  |  |  |  |
|  | 🕂 🔎 Type here to search 🛛 🛛 🛱 🥫 💿 💿 🔹 📬 👘 💪 |  |          |   |   |  |  |  |  |  |  |

#### Keep all sequence models for 1 user on same sheet but name them

### Identity & Day-in-Life Models in text

|                | Image: Travel Example       ☆       Image: Travel Example       ☆       Image: Travel Example         Image: File       Edit       View       Insert       Format       Data       Tools       Add-ons       Help       All changes saved in Drive   |   |   |                            |                |                                |               |                               |  |                            |   |   |
|----------------|--|---|---|----------------------------|----------------|--------------------------------|---------------|-------------------------------|--|----------------------------|---|---|
| k              | Company Comp |   |   |                            |                |                                |               |                               |  |                            |   |   |
| fx             |  |   |   |                            |                |                                |               |                               |  |                            |   |   |
|                | А  | В   | С   |                            |                | D                              |               |                               |  |                            |   |   |
| 1              | Identity U03   | I Do  | I Am  | I Like                     |                |                                |               |                               |  |                            |   |   |
| 2              |  | I make reasonably priced<br>choices for business        | I'm a Veteran TravelerI know how<br>to plan and prep for travel                       | I double of<br>the most of | heck<br>comfo  | availible seats<br>rtable ones | s to get      |                               |  |                            |   |   |
| 3              |  | I don't want my boss to think I'm wasting company money | I travel a lot for work and deserve the<br>benefits of rewards for personal<br>travel | 9                          | Day-in-Life Mo |                                |               |                               | ife Model i  | del in Sheets              |   |   |
| 4              |  | I'm embarrassed to saty at a \$400 a night location     | I ignore the rules and listen to pod<br>casts during take-off                         | 📄 Travel Example 🛧 🗉       |                |                                |               |                               |  |                            |   |   |
| 5              |  |   |   |                            |                | File Edi                       | lit View      | Insert Format Data            | Tools Add-ons Help A   | All changes saved in Dri   | ive   |   |
| 6              |  |   |   |                            |                | o ~ ē '                        | <b>P</b>   10 | 0% - \$ % .0 .00              | 123 - Default (Ari 10  | • • B <i>I</i> ÷           | A À 🎛 53 - 🗐  | + ↓ +  2  + 12 + GD   |
| 7              |  |   |   |                            | fv             | -                              |               | ÷ +                           |  |                            |   |   |
| 8              |  |   |   |                            | JA             |                                |               | R                             | C  | D                          | F   | F   |
| 9              |  |   |   |                            | 1              | U09                            | Pren          | pping to go                   | At Work  | Airport/Flight             | Hotel Barcelona   | In the World Barcelona  |
| 10<br>11<br>12 |  |   |   |                            | 2              |                                | Char          | rges all devices before       | Looks up flight possibilities<br>and books through company's<br>vender | Listens to podcast on      | Calls wife from hotel phone   | Uses public wifi to bring<br>up map app and find how<br>to walk back to hotel after<br>dinner |
| 14<br>15<br>16 |  |   |   |                            | 3              |                                | Dow<br>to ta  | nloads movies at home on blet | Talks to boss about best place to stay                                 | Watches movies on tablet   | Stays up late at hotel to<br>watch game on MLB.com<br>on laptop - paid for high<br>speed wifi | Uses colleague's phone<br>to access Yelp for<br>restaurant choices                            |
| +              |  |   |   | -                          | 4              |                                | Print         | s boarding pass at home       | Prints itinary a few days before going                                 | Annoyed no wifi at airport |   |   |
|                |  |   |   |                            | 5              |                                |               |                               |  |                            |   |   |
|                | •  |   |   | _                          | 7              |                                |               |                               |  |                            |   |   |
| ld             | entity N   | lodel in Sheet  | S   |                            | 8              |                                |               |                               |  |                            |   |   |
|                |  |   |   |                            | 9              |                                |               |                               |  |                            |   |   |

#### Journey Maps can be captured like Sequences or DIL

### Some models are still drawings

- Collaboration, Relationship, Physical
  - One person draws in Miro
  - Using a tablet with a pen
  - Display in Zoom for all to see as it is created
  - For 2 models a second modeler uses a different part of the same virtual whiteboard
  - It's faster with pen and tablet, but can still be done without in Miro



**Collaboration model in Miro drawn on tablet** 

#### Its slower and more work but it works – so keep the model number small

### **Remote tips: Collaboration**

Everyone can access the Sheet and Whiteboard so use it

- Participants can fix spelling or add detail as you go
- When each person can take a different tab, it's easy to navigate all the data without multiple documents
- Yell out when something belongs on a model
  - Stop every 20 minutes or so to see how all the data looks
  - Add to it if detail is lost
- Make sure everyone is talking don't forget the Facilitator
  - Be sure everyone is heard
  - Videos on you need to see the person to ensure engagement

#### Same rules: Don't discuss design ideas or questions – capture the data!

Data Consolidation Affinity Diagraming & Models

### Building an Affinity Diagram

#### Work in Miro like it is a wall

#### Use Zoom to see each other and talk

A small project scope and number of users makes this doable



The rules to build are the same

- Don't group by keywords and categories
- Worse when remote

It's slower but it works if you use the same process!

### Affinity in Miro: Initial grouping

Prepare

- Mark the main area where the affinity will be built
- Place all the notes on the board in one spot
  - Copy a range of cells from the spreadsheet and paste them into Miro, which will make one note per cell.
- Select all the notes, convert to plain rectangles, fix font sizes and alignment

Build together – Find the groupings first but don't label initially

- Use a voice channel to moderate the initial placement and let people talk if needed
- Each person selects 10 random notes from different users to make a personal pile to get started – when those are placed, they get 10 more etc
  - Or just select randomly from the big pile
- Put up one note and have everyone look for like notes from their pile. Keep going adding like notes until initial groups are formed
- After about 20 groupings, individuals can work more independently.

#### Follow the steps in the CD2 book: Page 139

### Initial groupings

| GuickTime Player File Edit View Window Help                                      | • <b>6</b> ¥ | 🛈 🏶 7.24 GB 🐓 🗟 🖣 🛇 🖵 🕙 🦂 🛜 | 👀) 100% 📾 🖽 Thu 10:21 PM david Q 🔕 😑 |
|--|--------------|-----------------------------|--------------------------------------|
|  | iii miro.com | 0                           | (b)(d)                               |
| miro Affinity trial 🖈 🖍 🥱  |              |                             | 옷 Share 141 ⑦ 유 Q E                  |
|  |              |                             |                                      |
| на<br>Па<br>Па<br>Па<br>Па<br>Па<br>Па<br>Па<br>Па<br>Па<br>Па<br>Па<br>Па<br>Па |              |                             |                                      |
|  | •            |                             |                                      |
| ©  |              |                             |                                      |
|  |              |                             |                                      |
| 甘口同內咒乙分《   |              |                             | 9%                                   |

### Adding labels

| 9:29 PM Sat Apr 18  |  |  |  |  | <b>()</b> 🔿 100% 🔲   |
|---|--|--|--|--|--|
| < > m   | AA   | € miro.com   |  | 5  |  |
| miro Affinity trial ☆ 1   |  |  |  | Share Share  | ₩ @ Q E  |
| ▶<br>⊟<br>Т   |  |  |  |  |  |
| 1   | A2 main<br>ann an Anna Anna Anna Anna<br>Anna Anna A | Aras and an  | A constraint of the second sec   |  | Inc. I and statements<br>and the statements<br>and                           |
| <ul> <li>Ø</li> <li>□</li> <li>□</li> <li>□</li> <li>□</li> </ul> |  |  | An  | No Angelang ange | And the<br>share and<br>the share and the share and<br>the share and<br>the share and<br>the share and the share and t |
|   |  | And a start of the |  |  |  |
| »   |  |  | A Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Particular<br>Part |  | 37%  |

### Finalizing the Affinity in Miro

Find initial themes

- Walk the groups and create rough "theme" labels in another part of the board.
- Move notes together with the same theme. These form the first "green" top level themes.
- Make a box in Miro for each Green area so it shows on the map

#### Build out the Green themes in sub-teams

- Assign 2 people to work together on each theme making labels.
  - Notes that don't belong to your Green are placed in an area in the appropriate Green section or Other
- Use a different voice channel foreach sub-team
- Sub-teams can work asynchronously making labels and sub-grouping.

#### Finish the affinity as usual

- Follow the steps to complete the Affinity.
- Review each other's Greens for goodness of groupings and labels
- Assign a 2-person sub-team to finalize overall language

Same process just on-line

### Work on Greens in pairs

| 🔆 Design Critic 🗙   🎽 Inbox (3,796 🗙   🝐 Batman Jar - 🗙   🚼 Travel Examp 🗙   📓 United Airlin 🗙   🔤 View Policy 🗙   😻 Remote CD - 🗙 🎢 Affinity trial, 🗙 + 👘 🗇 🗙 |  |  |  |   |      |            | - 0 ×                 |                       |
|--|--|--|--|---|------|------------|-----------------------|-----------------------|
| $\leftarrow \rightarrow$ C $\triangleq$ miro.com/app/board/o9J_kuEaV8A=/ $\bigtriangleup$ $\blacksquare$ $\bigotimes$ $\boxdot$                                |  |  |  |   |      |            |                       |                       |
| Access your boards faster by installing the Miro app on y  | our device.  |  |  |   |      |            |                       | ×                     |
| miro Affinity trial ☆ 1  | Ліго   |  |  |   | R DR | 은 Share    | ዛ፤ 😚 🗘                | Q 🗉                   |
|  | West   | in produce<br>in the local<br>transmission   | insuming<br>Second   |   |      |            |                       |                       |
|  | norman<br>Ingentur<br>Managari   | - mini-grave<br>- Annu di<br>Banara di<br>Ban | Foreigner<br>marveitige<br>genetie vij   | e verter<br>et en en<br>en en en en en<br>en en en en en en<br>en en en en en en<br>en en en en en  |      |            |                       |                       |
| т  |  |  |  | An entropy of the second secon  |      |            |                       |                       |
|  |  |  |  |   |      |            |                       |                       |
|  | e interviewe interview   |  |  | An of the second  |      |            |                       |                       |
| 1  |  |  | La de Carlos de La de Carlos de Carl | Ban Danama<br>Ban Danama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Banama<br>Ban |      |            |                       |                       |
| Ø  |  | the second<br>management   |  |   |      |            |                       |                       |
| ₽  | Landard Control (1997)<br>Control (1997)<br>Contro | and a second sec   | ing many<br>Marka<br>Panang pan<br>Panang  |   |      |            | 1997.<br>1997. (1997) |                       |
| #  |  | All and a second   | A Constant and a constant   |   |      | 341<br>341 | 1                     |                       |
| ſ₽   |  |  | -  |   |      | *          |                       | 73.233                |
|  |  |  |  |   |      |            |                       |                       |
| ↔♀▣₽₽₽₽₩   |  |  |  |   |      | 5 ×2       | <b>∭</b>  ↔           | - + 20%               |
| Type here to search  | o și 肩 🤇   | ) 🧧 🧧  |  | <b>i</b>  | ζ 📕  |            | へ 📥 🗖 🕼               | 11:47 AM<br>4/19/2020 |

### Other model consolidations

#### It is all the same as building an affinity

Assign a 2-person team to each model

Use a voice channel and appropriate collaborative tool

Create a Miro board for each model

• Or one giant landscape for all models so it is easy for the team to see each others work

Sequence

- Copy the text for each model section onto the board from a sheet making it into a sticky
- Move things around until you have sequence steps for the same activity together
- Complete as always just in the collaborative tool

Day-in-Life, Journey Map, Identity...

- Copy the text for each model section onto the board from a sheet making it into a sticky
- Gather quotes and stories for the other models in the correct place
- Choose: Pick the best stories and quotes and put them in the correct area of the model it's a mock-up

Drawn models are the same but start with the drawing

- Copy out all the same drawn models onto a new Miro Board
- Follow the rules for consolidating each model

# Make the final model beautiful

### Walk the Wall before Visioning

Walk the Affinity and Models in Miro and add Design Ideas

Follow the existing rules of a wall walk

- Put up your design ideas on stickies on the affinity or model
  - Use a new color sticky for DI's and Questions
- Work individually without discussion over 1-2 days
- Gather in a synchronous meeting to "make lists"
  - Use Google Doc to make each list: User issues, Hot Ideas, Technology to use
  - The "Pen" types while people contribute in a round robin format
    - Don't put your ideas in separately hearing others helps create a shared understanding
    - And avoids overlap

Create small groups of 4-6 to Vision different hot ideas in parallel

Use a different part of the whiteboard but separate voice channels for each group

#### Wall Walks can have 10 stakeholders – or multiple sessions

### Concept and Design Meetings Visioning, Storyboarding, UED, initial UI

Contextual Design is a set of working meetings

With clear goals, rules, roles, and goodness criteria

### **CD** remote working team meeting

Use the same meeting structure, roles, goals as usual

- Gather the people co-constructing and artifact in Zoom
- Remind everyone of the rules of engagement and roles of the meeting
- Assign The Pen, the one person assigned to draw the artifact based on team inputs
  - Miro on a tablet works for freeform drawing with a digital pen
- Assign a facilitator whenever more than 2 or 3 people meet
- Display criteria for goodness when evaluating the artifact uses critique meeting format
- Working design meeting process with > 2 people
  - Everyone focuses on the artifact being created ensuring ideas are incorporated or "parked"
  - The Pen draws the artifact in Miro on a displayed tablet
  - All contribute verbally to co-create an artifact according to the meeting rules
  - Slow down to be sure all in the group are heard when they talk

#### A dyad works for co-creating – multiple people doing their own thing doesn't

### Visioning on-line





#### Draw as usual but into Miro



#### Moderate & slow down so all can be heard

### Visioning process

Limit the number of participants to allow for airtime

- 4-6 participants in addition to the Pen
- Everyone talks to the Pen and the Miro board emerging building on the theme of the story
- Work in parallel teams on different vision themes
- Then review and evaluate together

#### Evaluate the visions when you have 4-6 created

- All are in Zoom looking at the Miro board for the vision to be reviewed
- A member of the sub-team explains the vision with no interruption
- A "Pen" uses a Google Doc to capture what works and what doesn't
  - Supports the user activity or not is implementable or not can be created by the business or not – supports business goals or not
  - Round Robin collecting first +'s then -'s
- Participants put a sticky with issues and design ideas to solve issues on the Miro Vision

#### Same process but now remote with a little more structure

### Zoom view of Visioning



#### Pen logs in twice: Computer to see people, tablet to draw

### Other design meetings are the same & easier

Teams work together in Zoom with Miro for the desired artifact

#### Storyboarding – 2 people on each activity

- Sketch initial ideas in Miro with a tablet each person might draw in a tablet
- When done draw the cells in Miro for review and sharing
  - Remember it is like a comic strip with all the information needed included
- UED 2-person sub-teams plus 2 UED owner partners
  - 2 person teams roll in function from storyboards creating a Focus Area in Miro or Gsheets as desired
  - Teams reuse Focus Areas as per the usual process
    - Color code sub team entries
  - All step back to review and reorganize the UED making each focus area coherent
  - UED owners create the final representation and normalization and documentation
    - Structural drawing shows the Focus Area name, purpose, and links
    - Document all function in Gdocs as the detailed companion to structural drawing

#### The fewer people working together the easier to co-design on the same artifact

### Initial interaction design

Another meeting with a drawing but in Figma

#### Initial UI "Paper Mock-up" – 2-person sub-teams on subsystems

- Identify design patterns to be used or use the corporate standards
  - Share ideas in Zoom with drawings in Miro and evaluate
- Sub-teams work out initial high-level interaction guided by the UED function in parallel sessions in Figma with a voice channel
- Share in a group meeting documenting issues and iterate
- Design owners get the mock-up into Figma for testing
  - Review in Figma like all other reviews
  - Iterate from internal feedback then get to the customer
  - Make changes to the mock-up live during the interview
  - When ready for higher fidelity make it interactive to test
    - Figma has what you need or if you don't have it try InVision for hot spots

### Figma: game design board





### Figma prototype for testing: Game



On the phone or a website

Every model, vision, storyboard, UED, UI ... Needs an internal review

https://www.witops.org/design-critiques/ How to run a critique –Just do it in Zoom

# Try it in your organization Let me know how it goes!

### **Remote Contextual Design**

Define & Validate Concepts

| 1 Contextual Inquiry                          | Talk to your customers in the field                                |
|---|--|
|   |  |
| 2 Interpretation Session                      | Interpret the data as a team to capture key issues and activities  |
|   |  |
| 3 Experience Models &<br>Affinity Diagramming | Consolidate data across customers for a full market view           |
|   |  |
| 4 Visioning & Cool Drilldown                  | Generate new products & the next product concepts steeped in data  |
| _   |  |
| 5 Storyboards                                 | Work out the details of particular tasks and roles                 |
|   |  |
| 6 User Environment Design                     | Define system structure, function, content and user interaction    |
|   |  |
| 7 Paper Prototype Interviews                  | Mock up the interface to validate direction and UI with customers  |
|   |  |
| 8 Visual Design & Agile Stories               | Design and test the final look; base stories on validated function |
|   |  |

### Steps mapped to tools

| Step                                     | Person  | Tools   |
|--|---|---|
| Contextual Inquiry                       | User  | Zoom plus user's phone  |
| Interpretation<br>Text model capture     | Team of 2-4<br>Moderator  | Zoom, Sheets or Docs  |
| Drawing model capture                    |   | Tablet and pen for drawings shared  |
| Affinity diagram                         | Team 3 – 6<br>Moderator   | Zoom, Miro with notes input from Sheets   |
| Model consolidation                      | Team 2 for each model   | Zoom, Miro, Tablet and pen for drawing shared   |
| Visioning                                | Team 4-6<br>Moderator and Pen   | Zoom, Miro, Tablet and pen for drawing shared   |
| Storyboarding                            | Team 2 for each activity  | Zoom, Miro for drawings, Tablet and pen for drawing shared, Slides for review         |
| UED, system structure, info architecture | 2 co-owners scribing<br>working with 2 team<br>members per subsection | Zoom, Miro, Google doc or sheet for UED detail  |
| Design patterns & mockups                | 2 co-owners with review from team                                     | Tablet and pen shared to sketch patterns or rough ideas.<br>Figma for higher fidelity |
| Mock-up tests                            | user  | Zoom, Figma, Sketch, InVision for testing with hotspots                               |





Karen Holtzblatt @kholtzblatt karen@incontextdesign.com

Addressing the complex problems facing today's leaders