

# Contextual Inquiry Exercise

Estimated time: 10-15 minutes per person

## Goal

discover which persona participant fits into and uncovers the new user experience, pain points, and bright spots

## Approach

1. *Introduction to participant as a IU student working on a project.* Ask participant if they have time to participate in a quick study. Ask participant for demographic information (name, year, major, age). Ask participant how familiar they are with creating a flowchart or having to diagram anything. Note whether or not you think this person could fall into “Inspire Me” or “I know what I want” persona.
2. *Provide more detail about the project:* We would like to show you a diagramming tool called Lucidchart and then give you a task to complete. We will give you a made up situation, let you use the tool and we are just going to watch you go through this web app to see what happens. We are not testing you and there are no wrong moves. Our goal is to see how people approach using this tool.
3. *Read scenario:* You are working on a school project where you will need to create a flow chart that visually depicts how to make a P&J sandwich.
4. *Ask questions:*
  - 4.1. What were some of your feelings as you went through this exercise?
  - 4.2. (ask a question that addresses any confusion they might have displayed: what about X confused you?)
  - 4.3. (ask a question that addresses how easily or quickly they were able to do something: I noticed that you were able to do X really quickly)
  - 4.4. (ask a question that addresses how long they spent doing something: I noticed that doing X took a few minutes, what about that slowed you down?)
5. *Thank them for their time and leave.*

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## Participants

Adam, 21, informatics students

\*was already a lucidchart user just not very often

scrolled down thru temps, 2-3secs tops looking at the templates before choosing blank

picked blank bcos nothing looked simple enuf based on the task he was going to do

Norman, 38, informatics professor

\*never used lucidchart, has used omni-graffle

Scrolled thru templates for longer than adam but still chose blank

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## Findings

- Some may see the template picker main window as finite
- The side panel is easily ignored
- “If I know what I want it to look like then I start from scratch, but if I don’t...” will look for templates
- “I wonder if any of these look like what I’m thinking”
- People spend seconds, if that, on the template picker modal
- People try to match what they see with their mental model of what they’re trying to make
- When people use templates, they are often modifying minimal aspects
- People may choose a template based on a visual representation regardless of the title
  - Most aren’t reading the words, rather looking for a visual that is similar with what they had in mind

## Insights

- People may need inspiration to get started or along the way based on what others have done trying to accomplish a similar task (create a flowchart, ERD, etc)
- There is something about the template picker UI which does not highlight the relationship between the templates and the side panel
- Visuals provide better guidance than written text

## Ideas from Insights

There are 3 areas we could possibly focus on

- 1) Redesign the template picker UI
- 2) Design a template inspiration add-on in or outside of the document/ Provide a frame of reference for templates while in a document
- 3) Change the new user onboarding flow