Observation Guide

1. Define Objectives & Scope

- ✓ Identify the purpose of the observation (e.g., understanding user behavior, identifying process inefficiencies, validating requirements).
- ✓ Clearly define the scope—what specific aspects or processes will you be observing?
- ✓ Decide on the type of observation:
    - Active (Participatory) – Engaging in the process to gain deeper insight.
    - Passive (Non-Participatory) – Observing without interfering, staying neutral.
    - Structured – Using predefined criteria and checklists.
    - Unstructured – Keeping the observation flexible and open-ended.

2. Plan the Observation

- ✓ Select the Right Environment – Choose the location where the process or behavior occurs naturally (e.g., workplace, meeting, customer interactions).
- ✓ Schedule Observation Sessions – Arrange observation sessions at times when stakeholders are most engaged and processes are typical.
- ✓ Identify Participants – Decide who will be observed (e.g., users, process owners, customers).
- ✓ Prepare Observation Tools – Create any necessary tools or checklists to guide your observation.
- ✓ Inform Stakeholders – Ensure that participants are aware of the observation and have consented (if applicable).

3. Conduct the Observation

- ✓ Arrive Early and Set Up – Ensure you are in place before the process begins and familiar with the environment.
- ✓ Observe Actively or Passively:
    - Active: Engage with the process as appropriate, such as asking questions or participating in activities.
    - Passive: Observe without intervening—record detailed notes on behaviors, actions, and interactions.
- ✓ Take Detailed Notes – Document key observations, noting both quantitative and qualitative details (e.g., how long tasks take, behaviors observed, challenges faced).
- ✓ Observe Interactions – Focus on how people interact with systems, processes, and each other.
- ✓ Monitor the Environment – Be aware of environmental factors that might influence the process (e.g., technical issues, distractions).

4. Analyze and Record Findings

- ✓ Identify Patterns and Trends – Look for repetitive behaviors, bottlenecks, and inefficiencies.
- ✓ Compare to Expectations – Compare what you observed to existing process documentation, requirements, or stakeholder expectations.
- ✓ Document Observations – Record findings in a structured manner (e.g., observations log, report). Capture both positive aspects and areas for improvement.
- ✓ Categorize Findings – Organize observations into categories (e.g., workflow issues, user challenges, process gaps).

5. Validate Findings with Stakeholders

- ✓ Discuss Observations with Stakeholders – Review your findings with relevant stakeholders to ensure accuracy and understanding.
- ✓ Clarify Ambiguities – If any observations are unclear, ask follow-up questions to clarify.
- ✓ Prioritize Findings – Work with stakeholders to prioritize the most critical issues based on your observations.

6. Report Insights and Recommend Actions

- ✓ Summarize Key Findings – Provide a clear summary of your observations, including any issues or inefficiencies uncovered.
- ✓ Recommend Improvements – Suggest actionable recommendations based on your analysis.
- ✓ Support with Evidence – Provide examples from your observation to back up your findings and recommendations.
- ✓ Create an Observation Report – Compile all your findings, insights, and recommendations into a formal report.

Tips:

- Ensure confidentiality if sensitive processes or behaviors are involved.
- Be unobtrusive—avoid influencing the process or participant behavior.
- Cross-check findings with interviews or surveys to validate patterns and insights.
- Be flexible—allow the process to unfold naturally, even if it deviates from your initial assumptions.
- Observe in context—take note of environmental, organizational, or external factors that might impact behavior.