

# Discover

## Shadow Session

Shadow session is a Ux methodology used to observe a participant perform day to day tasks within their natural environment. The key principle of shadowing is that the researcher acts as an observer only, which mean no interaction during all the length of the session.



PEOPLE	PREP. TIME	TIME	DIFFICULTY LEVEL
1	0	min. 30 min	● ○ ○



### USE THIS METHOD / TECHNIQUE TO

This method is particularly useful to see real behaviour on a product. It closes the gap between how it should be use from the standpoint of the designer and how it is actually use by the participants in the real context. The shadow session is even more valuable in the context of a work environment where user might experience stress that will push him to make irrational choices.

### THIS IS WHY YOU NEED IT

The shadow session is the best way to have first hand qualitative data for user behavior with the real user and the real environment. With an average of 5 shadow session per product and per persona, you will see most of the wrong assumption on how the product is used. And with a 2 hours shadow session per 6 weeks of work, as experimented by the british government, you will close the gap between how you product is mean to be used and how it is actually used.

### MATERIALS

- Recording device (audio and video)
- Bloc note

### WHO SHOULD BE INVOLVED

- UX designer
- User

## Briefing

Before starting the Shadow session the first step is to find the participant. Ideally 5 participants for each personas you determine. The preparation usually does not go further than that. As any type of hypothesis or preconceptions might biases his interpretation.



## STEP 1 - Brief (10min)

Spend a short period of time to explain to the participant what is the objective of the shadow session. Try as much as possible to not stress the participant to not influence its behaviour. Explain also why the session must be recorded and why is it useful for interpretation. And finally, if you want to test something specific, ask the participant to do these tasks in priority, but only do these tasks as you need to see the full context around them.

## STEP 2 - Observe

During this time as a design you objective will be to track down what the participant do and to note whenever he is doing a task that you will find interesting. Then report on the template whatever question / remarque you might have. You'll also observe the participant itself, see for example if he is distracted, doing another task, or often disturb by a coworker.

## STEP 3 - Questions

Once you consider you got through all you have to see, stop the session and take some time to discuss with the participant. Go through each action you wrote down and ask the question and remarque you have. Try to fully understand what made them do this action like that. Feel free to tell them why do you think they did it and let them comment on it. You can, if the participant is ok with it, start another audio recording to avoid spending time writing instead of asking follow up questions.

## STEP 4 - Findings

Once all the interview are conducted, it is essential to write down the finding, the earliest possible in order to not forget anything. The way you are writing the document is up to you but the idea is to find the cluster of similar behaviour from different participants. If possible, timestamp these behaviour from the footage you had in order to facilitate other people working on it. You can start writing recommendation for these behaviors or keep that part to be done with the team.



## How to use the template?

Use this template to make notes of the shadow session. One page per shadow session. The first part is to write where, when and who, in order to give context to the session. The table below that is to write down each action you are targeting. The first column is to determine the time needed for a user to take an action. Then the difficulty of this action, on a scale to 5 (0 very easy - 5 very hard). And finally in the last column you write a comment or question to ask the participant later on.