



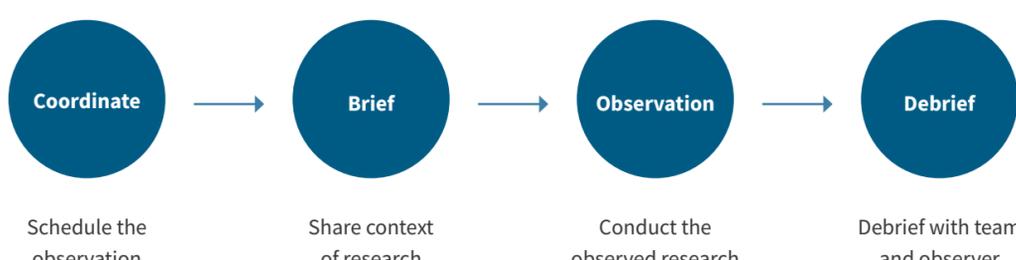
# DHS CX Leadership Observation Initiative

## I'm Hosting a Session, What Do I Do Now?

The DHS CX Team wants to ensure that you (the CX team hosting a session) can easily coordinate and conduct an observation session.

This resource has all of the suggested steps for ensuring a successful observation session. We have broken it down into stages and activities. These stages contain descriptions and tips to guide you on your way.

### Your typical leadership observation session stages



### Stage 1: Coordinate

#### Coordinate with the Observer

You have an observer lined up for your research activity. This is your opportunity to share what your team is doing, provide any background information, and agree on a date and time. This might take some time, so its good idea to have a few different time slots.

#### Tips

- Keep it brief at this stage, you might provide additional context later with a briefing.
- The goals here are to give some insight into your teams work and dial in an observation date and time.
- Be clear on how long the session will take.
- Include 5-15 minutes for an introduction and a session ground rules breakdown.
- Include time for your team's post research debriefing activity.

#### Activities

- Provide background and details on your service
- Give context to research being conducted
- Share potential dates and times for the observation
- Request the observer select a couple of times

### Stage 2: Brief

#### Brief the Observer

This is a chance for the observer to get excited about their UX research session and to learn more about what they we will be doing, their schedule and the participation ground rules.

We created a briefing sample for organizing this information in a standardized format. Share this via email and verbally if needed.

#### Tips

- Provide the briefing in person or verbally over a video call if possible.
- This is especially useful for observers who have not yet participated in an observation session.
- If you want someone to understand your research, it can help to provide extra information like a persona (a made-up person who represents your target customer) or a journey map (a diagram that shows all the steps a customer takes while using your service).

#### Activities

- Email the briefing to the observer
- Schedule a meeting for briefing (optional)

### Stage 3: Observation

#### Run The Observation Session

##### Before the research session

Remind the observer their job is to watch, listen, and learn during the research session. They should not interact with the participants so they don't interfere with the research. Consider running through the ground rules if necessary and cover the details and purpose of the research activity before the session.

##### Run the Research

You made it to the observation! It's time for you to run your research session.

#### Tips

- Keep the pre-briefing short and sweet.
- The observer should have their audio and video off after being introduced.
- Ensure the anonymity and protection of your participants.
- Remind the observer to stay for the activity debrief.
- Have the session host take notes of any issues that arise and what can be done to prevent them.
- Introduce the observer as a "guest observer."
- Act natural, the process or design is being tested, not you.

#### Activities

- Lay out established ground rules
- Describe research method and goals
- Remind observer that they are welcome to stay for the debrief

### Stage 4: Debrief

#### Include Observer in Debriefing

##### Debriefing

Make sure to invite the observer to the session debriefing. This is a meeting where you talk about what happened during the session. Reiterate the purpose of the debriefing before starting. Welcome the observer to participate and provide their insights.

##### Send Thank You

Be sure to thank the observer for participating in your research session. Establish a good relationship with the observer and let them know about any future research that you are planning.

#### Tips

- Let the observer know the goals of the session debriefing.
- Invite the observer to participate in the debriefing.
- This is your chance to indirectly share any limiting process or technology issues.
- On the thank you, include ways to keep the conversation going. Do you have upcoming observation opportunities?

#### Activities

- Invite observer to stay for the session debriefing
- Invite observer to participate if you would like
- Consolidate Notes
- Complete debriefing activity
- Afterwards send thank you note

