
Leadership Observation Guidebook:

Step-by-step activities, templates, tips, and resources for service teams
to host an observation session in federal services

By the DHS OCIO CX Team

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What is the Customer Experience (CX) Leadership Observation Initiative?

Vision

The CX Leadership Observation Initiative seeks to help the U.S. Department of Homeland Security (DHS) leadership experience the value of user research, usability testing, and other qualitative research by getting leadership in the room to hear and see the experience of customers and staff.

The Goals

Ensure that everyone who leads, manages, or influences those that make service design decisions spends at least two hours every six weeks learning from the experiences of customers and staff. This can include individuals such as business and product owners, their managers, senior leadership, and Office of the General Counsel staff.

How it works

Work with DHS CX to identify research activities where leadership can “ride along.” After that, the DHS CX team will help to coordinate with you and the leaders. This will require minimal effort your part.

Why Leadership Observation?

Observing customer scenarios helps leadership see the direct impact (good or bad) of policy, technology, and design decisions that they have the power to influence. It keeps them grounded in reality and enables their ability to keep customers and staff in focus when making impactful decisions.

How to Use This Guide

We created this guide for teams hosting leadership observation sessions. We understand that every session is different and may need unique approaches. So, don't feel like you need to follow this guide step-by-step. Within, you will find activities, tips, reusable templates, and other resources.

This Guide is Divided Into Two Phases:

Pre-Observation covers the planning and coordination that takes place before the observation session day.

Observation provides guidance for activities on the day of the observation session.

If you have any suggestions or want to get involved you can find us on Teams at #DHSCXunited or email us at cx@hq.dhs.gov

Phases are broken up into Activities

Activities are the actions available to complete the phase. While they have a logical order, many can be worked on at the same time. Each activity contains a checklist of actions to consider. They also have tips and linked resources available.

There are Three Key Observation Roles:

CX Host Team

The group making the tool, process, or service. Hosts of the observation.

Customer/Participant

The person that is experiencing the service.

Observer

Anyone not on the immediate team who is watching and listening.

Phase I: Pre-Observation

The pre-observation phase covers preparing your team and the observer for the observation day. The activities, checklists, and tips provided will help ensure everyone is ready.

Activities

1. Coordinating with the Observer
2. Finding a CX Session Host
3. Getting Ready for a Field Visit
4. Getting Ready for a Remote Observation
5. Make Sure to Brief the Observer
6. Final Preparation for the Observation

Key Documents

Observer Coordination Email

Observer Briefing Template



Activity 1

Coordinating with the Observer

You have an observer lined up for your research activity. It's time to share background information on what your team is doing. Also, give some potential dates and times for the observer to choose from. It may take a little back and forth to dial in the details, so it's best to give as many options as possible!

Coordinate with Observer

- 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

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 a session host introduction and a session ground rules breakdown.
- Include time for your team's post research debriefing activity.

Resources

[DHS CX leadership observation initiative hosting](#)

Key Documents

[Observer Coordination Email Example](#)



Activity 2

Finding a CX session host

It's recommended to have a CX host during the process that acts as point person for the observer. They should be available to answer any questions pertaining to your research and handle issues as they arise. If anything comes up, the Session Host can handle it without disrupting the session.

Identify CX Session Host

- Identify CX session host
- Invite the host
- Brief host on their role during observation

Tips

- If you're reading this, then you might be the session host!
- The host should be able to answer questions about the service and research being done.
- It may be helpful to have the session host act as a liaison through this process.
- Have the host resolve any issues for the observer to avoid disrupting the session activity.
- The host should have a separate chat with the observer open during a Remote Observation in order to discreetly answer questions they might have.

Resources

Key Documents



Activity 3

Getting Ready for the Field Visit

Make sure that preparation is underway on-site for the field visit. Review accessibility requirements, so there are plans to meet any needs. Send invites to all parties involved in the session. Make sure to include directions for where to go once the observer has arrived on location.

Filed Visit Preparation and Consideration List (service and site dependent)

- All relevant parties have visitation access to the observation site
- Necessary parties notified of observers presence (observation dependent)
- COVID protocols for size of team in an observation room
- Field-visit map of observation location and parking locations
- Escort from entrance to observation

Accessibility requirements consideration list

- Environmental obstacles (noise, temperature, weather etc...)
- Travel Accessibility (wheel chair accessible, elevators...)

Tips

- Call ahead to identify COVID restrictions and guidelines.
- Call ahead to request observer access for visit.
- Does the observer need to bring additional information or sign anything to gain access?
- Remember to keep accessibility for observer in mind.

Resources

[DHS CX leadership observation initiative: field visits](#)

[DHS component agency contacts](#)

[Find your 508 program manager \(DHS\)](#)

Key Documents

[Field Visit Preparation Checklist](#)



Activity 4

Getting Ready for the Remote Observation

Make sure that preparation is underway for the remote observation. Review accessibility requirements, so there are plans to meet any needs. Send meeting invites to all parties involved in the session.

Remote Planning and Preparation List (service and site dependent)

- Identify remote teleconference capabilities for all parties
- All parties have access to teleconference software
- All parties audio and video feeds are functioning
- Identify all parties connectivity issues
- Access is given to additional application
- Ensure observer will have communication line to session host

Accessibility requirements consideration list

- Close captioning for video sessions
- American sign language interpreter if available or needed

Tips

- Ensure all members have reliable connectivity.
- Note if links and passwords are needed for additional applications.
- Remember to keep accessibility for observer in mind.

Resources

[DHS component agency contacts](#)

[Find your 508 program manager \(DHS\)](#)

[Webex accessibility features](#)

[Accessibility overview of Microsoft Teams](#)

Key Documents



Activity 5

Make Sure to Brief the Observer

Brief the observer to give them context, a breakdown of the schedule, and some ground rules. We created a briefing template, for organizing this information in a standardized format. Share this via email and verbally if needed.

Create the Briefing

- Objective
- Research method conducted
- Date, time, location, schedule, and duration
- Participants list and roles
- Session Ground Rules
- Service background and overview
- Service purpose, mission, and goals
- If applicable provide journey map and persona

Brief the Observer

- Email briefing to observer
- Reach out for verbal briefing

Tips

- At this point all details for the observation session should be finalized.
- It might be helpful to provide the briefing in person or verbally over a video call. This is especially useful for observers who have not yet participated in an observation session.
- Don't forget to include information regarding the session host.
- Including a persona and journey map can provide context to the observer of where this observation takes place in the life of the service.

Resources

Key Documents

[Observer Briefing Example](#)



Activity 6

Final Preparation for the Observation

Use this time to prepare for any issues that might arise during the observation. It's recommended that the team completes a dry run of the session with someone standing in for the observer. Make sure that you're aware of and ready to meet all accessibility requirements.

Pre-observation check List

- Conduct field visit / remote check list
- Ensure accessibility requirements
- Test observer video/audio capabilities
- Test service team video/audio capabilities
- Ensure everyone has access to service site and location
- Resolve last minute field visit or remote issues
- Send out observation engagement reminder letters

Conduct a practice run of observation

- Review roles and responsibilities
- Practice ground rules and expectations briefing
- Practice observation
- Practice debrief and feedback sessions
- Access and operate communication platform

Tips

- Send reminders to everyone who is participating.
- Check to make sure everyone has confirmed.
- Perform a practice run of the session to ensure preparedness and uncover any issues.

Resources

Key Documents

[Field Visit Preparation Checklist](#)

Phase II. Observation

The observation phase covers activities that occur around and during the observation period. It provides guidance for you to make sure that everything runs smoothly the day of the observation.

Activities

7. Completing the Final Checks
8. Covering the Session Ground Rules with the Observer
9. Run the Session Activity
10. Invite the Observer to Stay for the Session Debriefing
11. Request and Share Observation Process Feedback
12. Send Thank You Note to Observer

Key Documents

Preparation Checklist

Ground Rules Briefing Guide

Thank You Letter Template



Activity 7

Completing the Final Checks

This is the last opportunity to ensure you're good to go. Does everyone have an invite to the session or access to the location? Check in with all personnel to make sure they're ready.

Run through Field Visit or Remote Checklist if necessary

- Review roles and responsibilities
- Review preparation check list
- Ensure accessibility requirements are met

Ensure your team is prepared

- CX host ready
- Moderator ready
- Facilitator ready

Tips

- Limit the number of personnel participating in the observation to only those that need to attend.
- Double check to make sure that everyone is invited and has confirmed.
- Remind your team that the observer is not there to audit or judge them.

Resources

Key Documents

[Field Visit Preparation Checklist](#)



Activity 8

Covering the Session Ground Rules with the Observer

You're going to want to this time right before the session to remind the observer of the session ground rules. Their role is to watch, listen, and learn. It's key they avoid interacting with the participants so they don't interfere with the research. This is also a good opportunity to cover the details and purpose of the research activity.

Brief Key Leader on ground rules and expectations

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

Tips

- Keep the final 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.

Resources

Key Documents

[Observer Briefing Email](#)



Activity 9

Run the Session Activity

You made it to the observation activity! It's time for you to run the session. The session host should be standing by (whether physically or on another chat) to help the observer if any issues or questions arise.

Run the research activity

- Session host is ready to answer observer questions
- Time to run the session!

Tips

- 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.

Resources

Key Documents



Activity 10

Invite the Observer to Stay for the Session Debriefing

Make sure to invite the observer to the session debriefing. Reiterate the purpose of the debriefing before starting. You're welcome to invite the observer to participate.

Session Debriefing

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

Tips

- Let the observer know the goals of the session debriefing.
- You can invite the observer to participate but it's not required.
- This is your chance to indirectly share any limiting process or technology issues.

Resources

Key Documents



Activity 11

Request and Share Observation Process Feedback

Now that the observation is over, it's helpful to get feedback from everyone involved. We want to capture what the observer feels they gained from the observation. From your team, we could use perspective on this process and the resources provided. Please share this information with us!

Request Observer Feedback

- What was the most important thing you heard?
- What was the thing you saw or heard that surprised you the most?
- What's the biggest unanswered question you have at this time?

Request CX Team Feedback

- What we went well?
- What can we do better?
- What actions can we take to improve?

Share Your Feedback

- Send this information to the DHS CX Team at cx@hq.dhs.gov

Tips

- This feedback will be used to gauge the initiative's effectiveness and drive improvement.
- It's best to try to get feedback as soon as possible (hopefully at the end of the observation)
- If the observer can't stay to provide feedback then request it via email.

Resources

Key Documents



Activity 12

Send Thank You Note to Observer

Thank the observer for observing your research session. This is a great opportunity to establish a pattern for continuous engagement. So, feel free to let the observer know about research being planned.

Send Thank You

- Compose thank you
- Send thank you
- Share future observation opportunities (optional)

Tips

- Mention something specific about this observation.
- Make it personal.
- Include ways to keep the conversation going. Do you have upcoming observation opportunities?

Resources

Key Documents

[Thank You Email Example](#)

Additional Resources