From Basecamp to Summit: Scaling Field Research Across 9 Locations

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Abstract
In this case study we discuss the mechanics of running a complex field research project within one week: 32 field visits, 4 countries, 9 locations, 10+ researchers, 30+ observers. We outline the goals that lead to this project plan, and the tools and processes we developed to succeed under the constraints given. We discuss in particular (1) the role of ongoing in-field analysis and data sharing, (2) the role of basecamp as a centralized mission control center and real-time analysis hub, and (3) the added value of running the study and initial analysis in such a compressed time frame. We close with a reflection on the strengths and weaknesses of this approach, as well as ideas for future improvements.

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Field research, methods, qualitative analysis, ethnographic research

ACM Classification Keywords
H5.2. Information interfaces and presentation: User-centered design, Evaluation/methodology.

General Terms
Design, Human Factors, Management

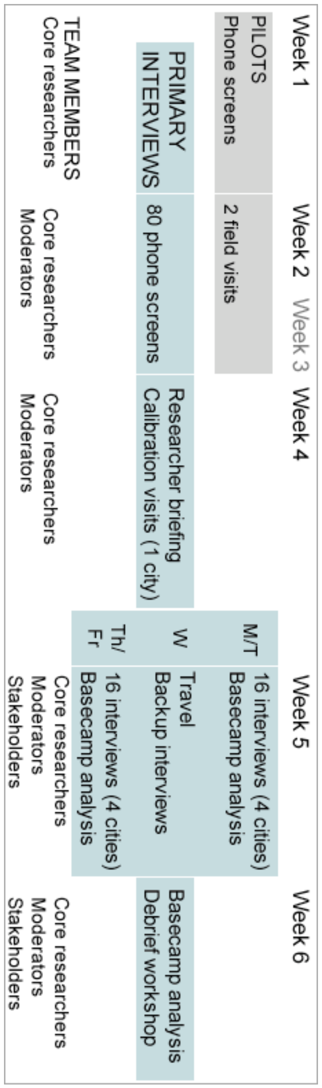

Figure 1. Project timeline and logistics.

Introduction

At Google, as in other technology organizations driven by the desire to innovate, immersive field research is often undertaken to lay the foundation for product design [3][4]. In planning such field research projects, the research goals must be balanced with time and logistical constraints. In this case study, we discuss a recent research project consisting of field visits to small businesses in Spain, France, the UK and Russia. We illustrate how we navigated these demands and reflect on the extent to which we achieved a balance.

We had the following operational goals:

1. To engage a large number of colleagues with research participants to build empathy and understanding
2. To provide recommendations for improvements to existing products
3. To collect data that can be used over the long term to address future product questions

We also had a number of practical constraints. Time was the most salient, and it shaped our processes considerably: fieldwork needed to be completed within a week to minimize disruption for participating colleagues, and a debrief workshop had to happen immediately following fieldwork, while team members were co-located.

Project overview

Figure 1 presents an overview of the project plan. For our 32 visits, we started from a pool of 150 pre-screened businesses, identified by local agencies. From those 150, we conducted 80 brief telephone interviews to gauge suitability and establish rapport. We held two days of pilot sessions in Zurich, in order to fine-tune and standardize field tools and processes between moderators.

During field week, we visited each of the 32 businesses, via 4 field teams working in parallel. In each of France, Spain, the UK, and Russia, we visited one large city, one secondary city, and four businesses in each city. Each visit lasted approximately two hours and was led by one member of our research team who spoke the local language. This moderator was accompanied by 2-3 stakeholders on each visit.

Immediately following field week, we convened all researchers and participating observers (a group of about 30 people) for a 1-day debriefing workshop, again in Zurich.

Distributed Data Gathering

The tight timeline and the distributed nature of the fieldwork required development of a strict protocol around data sharing and initial analysis. With only 1 workday between the field week and the workshop, it was imperative to have data come in from the field in an organized manner to facilitate efficient analysis. Below is an outline of the data collection process we used for each field visit.

Debrief with the team (Fig 2). This discussion happened immediately or soon after the actual field visit. All members of the field team reviewed notes and observations for approximately 1.5-2h per visit.

Complete the debrief template. This template contained sections for collecting evidence and counter-evidence around specific themes identified in prior

Figure 2. Field team debriefing after a visit.

Figure 3. Moving between field locations.

research or motivated by product strategy questions. We also provided a section to note specific bugs that had been observed serendipitously, as well as space to jot down emerging themes and ideas that came up in the debrief session or during observation [1].

Post to the internal field blog. The style of these posts was a journalistic narrative to convey some of the memorable anecdotes, along with a few photos from each visit.

Share all media. Finally, field teams uploaded photos, video, and audio. All teams were equipped with wifi passes and 3G data cards to facilitate access to our internal cloud-based collaboration tools (Google Docs, Spreadsheets, Sites, Picasa, Video, Blogger).

The goals of this highly structured debrief and sharing protocol were twofold. First, we wanted to ensure some level of processing and contextualization before the team went on their next visit. Second, given the tight timeline, we wanted to provide visibility on emerging insights across locations to those in basecamp.

Basecamp

A stationary hub of four researchers worked from a basecamp in London. Their responsibilities follow.

Firefighting. Maintaining contact with field teams, schedulers, and colleagues arriving for individual field visits. In practice this often meant rearranging visits or schedules on the fly.

Ongoing analysis. As debrief notes and media began arriving from the field teams (Fig. 4), the basecamp team started structuring data along three dimensions: (1) pre-existing hypotheses from previous work; (2) themes discovered by each location; (3) themes that surfaced across observations from all field teams [3]. They also printed photos of participants, environments, and blog posts, to facilitate referencing of stories.

Workshop preparation. Preparing for the workshop (Fig. 5) consisted of two activities: (1) culling through photos to illustrate the emerging themes (we had encouraged teams to take 100+ photos from each visit) and (2) providing a template presentation for the field teams to populate with location-specific insights.

Internal PR. As stories and photos from the field were coming in, basecamp sent summaries and memorable anecdotes to stakeholders. They also included material in ongoing product discussions, which those in the field did not have easy access to. These virtual research postcards [4] helped to create buzz and anticipation for the workshop and findings.

Reflection

A few months have now passed since the field week, allowing us to reflect on our approach.

What worked well. Bringing along non-research colleagues was very valuable. First, their varied backgrounds gave them unique perspectives through which to interpret observations. Second, some of the product bugs we recorded have quickly been fixed because the decision-makers were with us. Thirdly, these stakeholders helped to spread the word about this project and its findings.

Other aspects that we would repeat include the use of detailed debrief templates, real-time sharing with

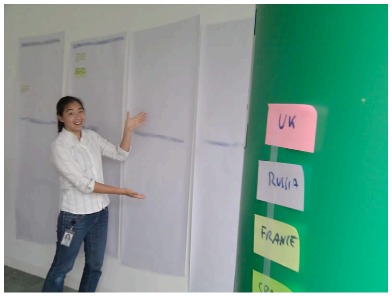

Figure 4. Basecamp – ready for incoming reports.

cloud-based collaborative tools, and a basecamp crew to coordinate and analyze in real time.

What we'll try next time. This project plan had some redundancy built in: we sent two researchers per country, started with a list of 150 candidate businesses to visit 32, and called each of the businesses to establish rapport before the visits. Yet, a number of cancellations and unsatisfactory phone interviews meant that we just got by in the end.

This research also put very high demands on our field teams. With two interviews, two debriefings, travel (Fig. 3), preparation, and media management each day, this added up to a considerable workload. To make this load lighter for future studies, we recommend eliminating the field blog, and exploring other ways of conveying quick initial impressions. For example, we could take advantage of micro-blogging tools, or wifi photo SD-cards.

Finally, we were hoping to inject emerging cross-location themes from basecamp back into field teams' scripts as the fieldweek evolved. In practice, this rarely happened, since moderators in the field had been imprinted with the script and goals from our earlier calibration visits.

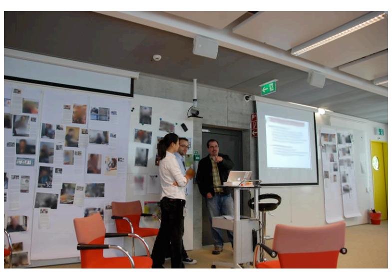

Figure 5. Workshop - wall notes moved from basecamp.

What we gained. Had we run these interviews in serial, rather than parallel, the process would have been much simpler. Why did we go through the trouble of compressing such a complex project into one week, running concurrently in 9 locations?

One reason is that we wanted to look across locations at one point in time. If data collection stretched over too long a period we could have difficulty attributing findings to locations, when the cause might be time.

The main reason was that we wanted to create momentum and buzz, through an event that would be noted and talked about throughout the company. A number of colleagues disappeared for a couple of days, had intense experiences in the field for one week, and then shared their stories immediately in a workshop. Generating this level of excitement would be difficult for a study running over multiple months. The reactions to date lead us to believe that that the gain in momentum was worth the additional effort.

Acknowledgements

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