



Experiment 8

Follow Front-line Staff

Shadowing is a basic observation technique that allows you to unobtrusively learn about an experience from the perspective of a single

user. Following front-line staff (or a customer) will help you uncover patterns and insights in interactions between customers and staff.

STEPS

1

Ask a front-line staff (or a customer) for permission to follow her or him while they're interacting at a branch.

2

Document their interactions without intervening. Identify specific moments that draw your attention and descriptively record them in your notebook.

3

Once the agent is done, ask if they have 20 minutes for a follow-up conversation. Discuss the specific moments that may have sparked your attention, such as:

Why did you perform a task or handle an interaction in a certain way?

Did you use any tools or processes to support your work?

How did you feel? What were you thinking?

What challenges did you face?

Could anything in the experience be improved?

Are there any promising practices that could be expanded?

TIME

40 minutes-1 hour observing
20 minutes for follow-up conversation

ROLES

1 facilitator
1 front-line staff (or customer)

MATERIALS

Notebook
Camera phone (take photos as long as it's not distracting)
DIY tools (to capture insights)

USE IT WHEN

- You want to gather input for a customer journey map
- You want to gather learnings and stories about how customers engage with your products and services at a branch
- You want to better understand how to design delivery of an offering through branch staff or agents

USE IT TO

- Gather input to build a customer journey map
- Practice your skills for further qualitative research