

Site visit conducting tip

When you arrive

- Greet the manager as well as the user.
- Greet the user's colleagues, especially if they share space.
- Ask permission again about setting up your AV equipment.
Ask for space that you need, but don't interfere with others' work.
- Verify expectations about the length of your visit and what you plan to do while you are there.

While you are there

- Make it a cooperative venture.
- Work to build rapport.
- Remember you are interested in what users do – whatever and however they do it.
- Don't let the user make you the "expert" who can explain how to do it.
- Reassure users if necessary and remind them that they are not being tested.
- Be flexible about schedules, breaks, other tasks users have to do. (This may all be part of the data that you want to capture.)
Watch your own verbal language and body language, so that you stay friendly, but neutral.
- Take lots of notes. Write down everything. Overdo the notes.
Many people have regretted not taking enough notes.

When you are leaving

- Thank the manager as well as the user.
- Give the user a gift (or let the user know you will be sending one).
- Pack up quickly and quietly.

Afterwards

- Send a thank you to both the user and manager.