Facilitator Guide – Small Discussion Group

Hi everyone, my name is _____, and I'm going to be walking you through this session today.

Before we begin, I have some information for you, and I'm going to read it to make sure that I cover everything.

You probably already have a good idea of why we asked you here, but let me go over it again briefly. We're asking people to provide feedback for USPTO's Next Generation initiative, specifically _____. The discussion should take about two hours.

The first thing I want to make clear right away is that there are no wrong answers or opinions, and you don't have to worry you're going to hurt our feelings. We're doing this to improve our ability to serve the public, so we need to hear your honest reactions.

If you have any questions as we go along, just ask them. I may not be able to answer them right away, since during some activities we're interested in what people do when they don't have someone sitting next to them to help. But if you still have any questions when we're done I'll try to answer them then. And if you need to take a break at any point, just let me know.

You may have noticed the microphone. With your permission, we're going to record what happens and our conversation. The recording will only be used to help us figure out how to improve our applications, and it won't be seen by anyone except the people working on this project. And it helps me, because I don't have to take as many notes.

IF THERE ARE OTHERS PRESENT IN OBSERVATION ROOM:

Also, there are a few people observing this session in another room. (They can't see us, just the screen.)

If you would, I'm going to ask you to sign a simple permission form for us. It just says that we have your permission to record you, and that the recording will only be seen by the people working on the project.

❑ **Give them a recording permission form and a pen, (or if remote, read them the form and have them give verbal confirmation of approval.)**

❑ **While they sign it, START the RECORDER**

Do you have any questions so far?

OK. Before we start, I'd like to ask you just a few quick questions.

First, what's your occupation? What do you do all day?

And what is your interest in the USPTO's services?

OK, great. We're done with the questions, and we can start some activities.

The first activity we'll be performing involves sorting cards into categories. I'm going to give you a stack of cards, and on each card is the description of a specific application feature or type of content. I'd like you to sort the cards into groups that you feel are similar. You can choose any groupings you feel are appropriate. When you are finished I'd like you to describe each group.

❑ **hand each participant cards and ask if they have any questions.**

❑ **When finished, ask each participant to describe their groupings**

For the next activity I'd like to discuss the aspects involved when you are engaged in the activity of _____ [e.g. creating a patent title]. We are interested in understanding how you perform this activity so that we can ensure the software supports your workflow. I'd like you to write a single item on each sticky note and arrange them in the order you work. Each sticky note may contain a distinct task, or other aspects of your work such as people you talk with, or computer systems you access during the activity.

> ❑ **Hand each participant a marker and pad of sticky notes and ask if they have any questions.**
>
> ❑ **While engaged in the activity, prompt the participant(s) to explain choices.**

During our last activity, I'd like to show you some mockups we are working on and get your feedback. These are works in progress and they can be easily changed, so please provide your honest opinion.

> ❑ **Show the mockups to the participant(s) and discuss with them the features that are represented. Ask for their feedback and elicit suggestions.**

Thank you for your feedback today, it is much appreciated. Before you go, would you be interested in participating in another feedback session at a later date?

Do you have any questions for me, now that we're done?

> ❑ **Stop the recorder and save the file.**
>
> ❑ **Thank them and escort them out.**