Anatomy of a Field Visit

There is a moment, usually within the first hour of arriving at a client's worksite, when you stop taking notes and just watch. A manager walks past a staff member without acknowledging them. A pile of forms sits unsigned on a corner desk. A joke lands a little too easily when the director speaks. None of this was on the observation checklist. But all of it is information.

This is the field visit — and at The First Principles Advisory, it is the foundational unit of our consulting work.

What a Field Visit Actually Means

The phrase carries different meanings depending on who is using it. For a filmmaker, it is about texture and testimony. For an investor, it is verification — does reality match the pitch deck? For a service provider, it is troubleshooting a broken link in delivery.

At The First Principles Advisory, it is something broader: a structured effort to understand an organisation as a living system, not as a set of documents. It is an attempt to observe both the whole and the parts — and how they interact. An organisation is not its strategy paper or its organogram. It is the continuous negotiation between people, processes, systems, culture, and power. These elements shape each other in ways that are rarely captured in reporting, and almost never visible from the outside without deliberate effort. The field visit is where that effort happens.

The Tools We Bring

Effective field work begins well before arrival. Prior research — programme data, financial flows, monitoring records, staff profiles, complaint registers — builds a scaffold of informed questions. We do not arrive with a blank slate; we arrive with a prepared curiosity.

On the ground, observation is the primary instrument. Not just what people say in formal settings, but what happens in the margins: who speaks first, who waits to be spoken to, whether the values articulated in a mission statement are legible in the room where decisions are actually made.

Informal conversations carry significant analytical weight. A conversation over tea with a field coordinator, a walk between offices with a programme officer — these tend to surface what formal interviews cannot, precisely because they are lower stakes and less scripted. We treat them as data, not background noise.

We trace paper trails deliberately. Fund flows, approval chains, monitoring records, and exception reports reveal the incentive architecture of an organisation — not as it is intended, but as it actually operates. When a mission is functioning well, there is usually an alignment between stated priorities and the structures that reward behaviour. When it is struggling or beginning to collapse, the incentives are almost always pointing somewhere other than the mission. Following the paper is often how you find the gap.

We also attend carefully to leadership style — whether it opens up or closes down, whether it distributes ownership or concentrates it. And we observe how gender, caste, class, and religion are operating: in who holds formal authority, in who exercises informal influence, in the small daily dynamics that shape organisational culture whether or not they are acknowledged.

Documentation as Collaborative Sense-Making

Field observations without rigorous documentation remain impressions. The discipline of capture — structured notes, relationship maps, trend analysis across sites and conversations — is what allows pattern recognition to happen with some rigour.

We look for trends, but we are equally attentive to exceptions. The field worker who consistently delivers strong outcomes where others do not. The district where results persistently underperform without an obvious explanation. Exceptions are not data problems to be smoothed over; they are often the most analytically productive observations in the room.

And we ask why — repeatedly, and at different levels. Why does this process work here but not there? Why has this gap persisted despite previous attempts to address it? The why questions, followed carefully, are what distinguish analysis from description.

But the final — and perhaps most important — discipline is how findings are brought back. At The First Principles Advisory, the output of a field visit is never delivered as a verdict. It is brought into conversation with the people who live and work inside the organisation. The goal is a shared reading: one that acknowledges what is working, names what is not, and opens up — rather than closes down — the question of how processes and systems can be made more genuinely mission-centred and client-responsive.

Scrutiny without solidarity is just audit. What we are after is the kind of reflection that an organisation can actually use.

Seema is the founding partner of First Principles Advisory.