Interviewing Users: Uncovering Compelling Insights

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INTERVIEWING USERS
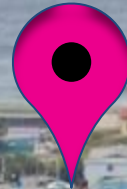How to Uncover Compelling Insights

by **STEVE PORTIGAL** foreword by Grant McCracken

Rosenfeld

Templates, samples, presentations

http://rosenfeldmedia.com/books/interviewing-users/resources

Portigal

We help companies discover and act on new insights about their customers and themselves

Problem Framing/Research Practices

Ethnography

Ethnographic interviews

Video ethnography

Depth-interviews

Contextual research

Home visits

Site visits

Experience modeling

Design research

User research

User-centered design

One-on-ones

Camera studies

User safaris

Many terms exist; I'm saying "Interviewing Users"

Ethnography
Ethnographic interviews
Video ethnography
Depth-interviews
Contextual research
Home visits
Site visits
Experience model
Design research
User research
User-centered design
One-on-ones
Camera studies
User safaris

What-ever!

Beyond our terminology, what are we doing?

Examine people **in their own context**

- What are they doing?
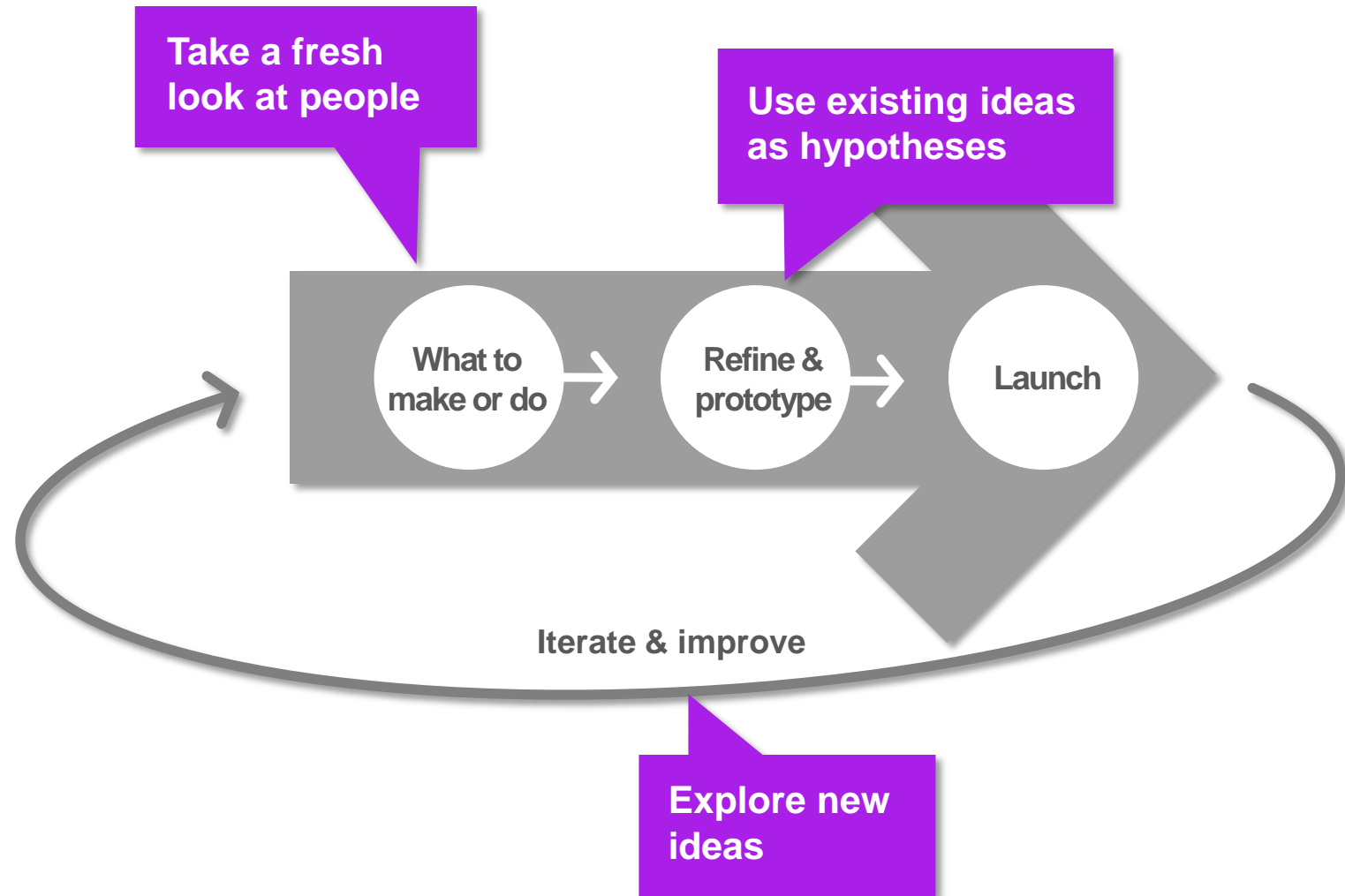- What does it mean?

Infer (interpret/synthesize/etc.)

- Find the connections
- The researcher is the "apparatus"

Apply to business or design problems

- Use products, services, packaging, design to tell the right story
- More possible types of solutions than we started out with

Interview users throughout the development cycle

Take a fresh look at people

Use existing ideas as hypotheses

What to make or do

Refine & prototype

Launch

Iterate & improve

Explore new ideas

The Business Question

While we always uncover so-called pain points, the bigger opportunity may come from understanding **why** – how did we get here?

Satisficing (coined by Herbert Simon in 1956) refers to our acceptance of good-enough solutions

These can drive engineers and designers crazy…but the real problem isn't always what it appears to be

I asked for it to use less memory.
Now it uses less memory.

I'm a tech goddess.

Windows 7

Different Methods Work Together

Music Application Usage

Application	Yellow	Maroon	Purple
Windows Media Player	55%	55%	55%
RealPlayer	38%	33%	35%
iTunes	18%	23%	28%
MusicMatch Jukebox	18%	17%	20%
Winamp	7%	7%	16%

Different Methods Work Together

Music Application Usage

Windows Media Player	55% / 55% / 55%
RealPlayer	
iTunes	
MusicMatch Jukebox	
Winamp	7% / 7%

0%
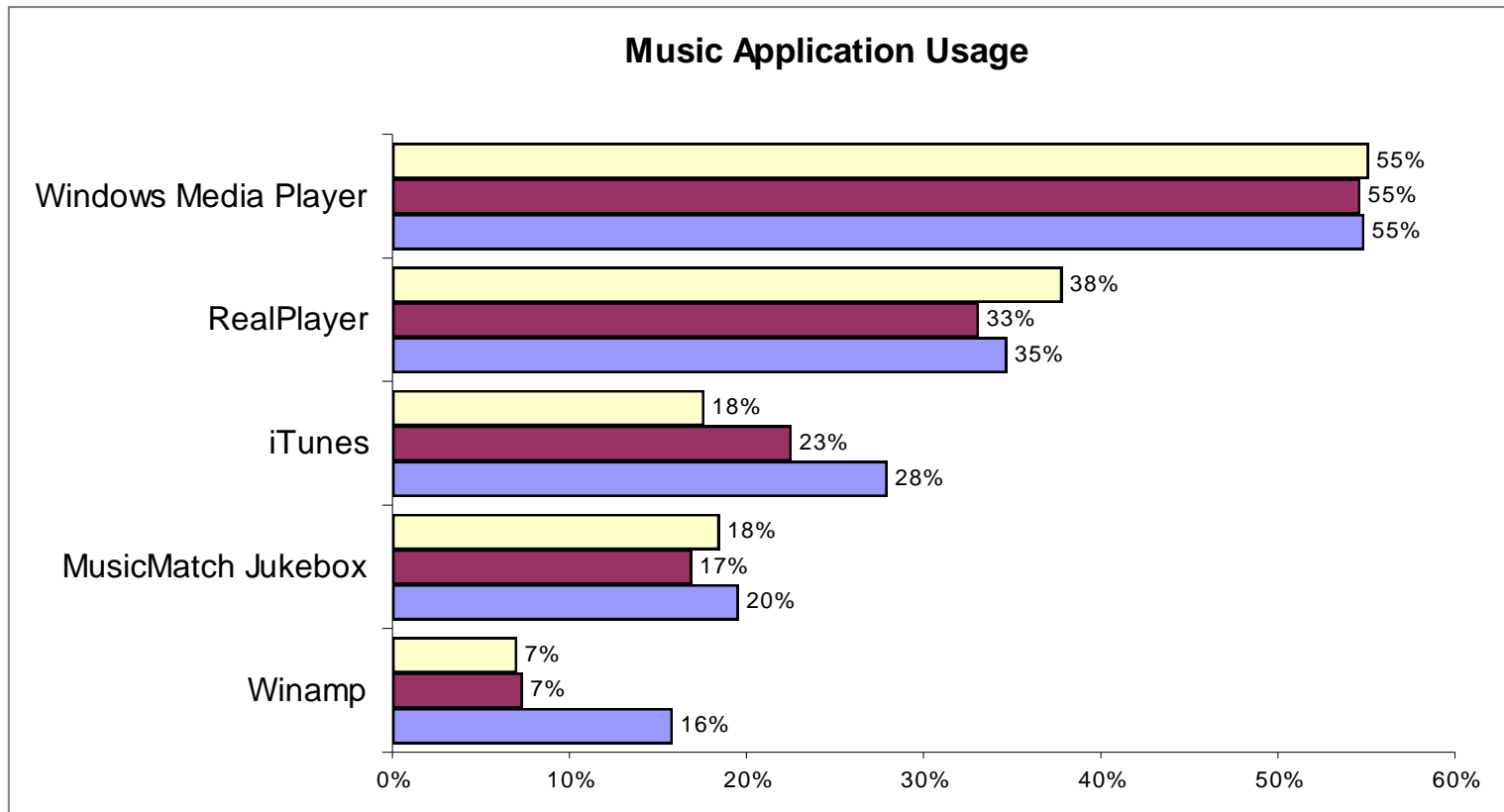
Who you learn from is not who you design for

What is the desired **relationship** to the product/service/brand/activity?

- Typical user
- Non-user
- Extreme user
- Peripheral user
- Expert user
- Subject-matter expert
- Wannabe user
- Should-be user
- Future user
- Past user
- Hater
- Loyal to competitor

> Triangulate through multiple perspectives
>
> By creating contrast, **you reveal key influencing factors** that you wouldn't otherwise see

Recruiting criteria: Type of user

Think about the **whole system**: the chooser, the influencer, the user, and anyone who is impacted by those roles

Challenge assumptions about who the organization is implicitly/explicitly designing for
- Is that everyone?
- Do they even exist?

This will surface a broader sense – even prior to research – about who is affected by the product and who is being designed for
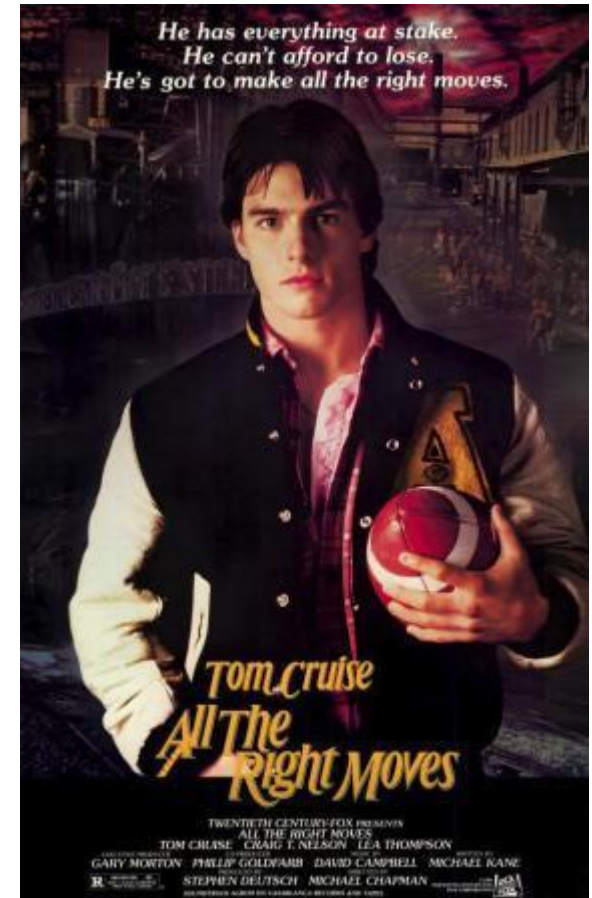
When working with a global producer of sports apparel, it took four weeks to untangle the conflicts about who we should study. Their entire culture is based on their aspirational customer: a male lettered high school athlete. The bulk of their sales come from women 28 to 35.

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The interview guide (or field guide)

A detailed plan of what will happen in the interview

- Questions, timing, activities, tasks, logistics, etc.

Transforms **questions-we-want-answers-to** into **questions-we-will-ask**

Share with team to align on issues of concern

- Especially with multiple teams in the field

Helps you previsualize the flow of the session

- Include questions as well as other methods that you'll use

Four sections to the field guide

1. ## Introduction and Participant Background
   - Logistics, timing, objectives

2. ## The Main Body
   - Subsections for each area you plan to explore (e.g., configuration, learning about new features, etc.)

3. ## Projection/Dream Questions
   - Be audacious and ask about predictions for the future or ideal experiences

4. ## Wrap Up
   - Logistics, ask about anything they want to tell you that you didn't ask about

Minimalist field guide

Topics Guide
- History and background
- Shopping and learning
- Integration into physical environment
- Connectivity
- Wish-list and future features

Detailed field guide

Introduction (1 min)

[Restate goals: *We are interested in understanding how you plan for and manage money, the kinds of tools or information you are using*, confirm timing: *2 hour session*]

1. Do you have any questions for us?

Household Overview (14 min)

2. Let's start by having you introduce yourselves and tell us about your household.

3. Who lives here? For how long?

4. What type of work do you each do? [*Reference screener*]

5. You told us [*Reference recent or expected life change(s) from screener*]. What has happened/what will be happening?

6. Tell us about what you have done as a result of this occurrence. *Probe for financial and non-financial choices.*

7. Tell us about what you will do as a result of this occurrence. *Probe for financial and non-financial choices.*

8. Tell us about your process in planning for that. Were there things that made it difficult? What would have made it easier?

Financial Management (25 min)

9. When you hear a term like "managing my money" what do you think it means?

10. What type of money management things do you typically do?

    a) What types of things do you do for the immediate or short term?

    b) What types of things do you do for the medium or longer term?

    c) Are there things you do that are reactive?

    d) Are there things you do that are proactive?

    e) What types of things have been successful?

    f) What types of things have been less successful? Have you tried any approaches and then given up on it after a while? Why?

Include other methods

Tasks	"Can you draw me a map of your computer network?"
Participation	"Can you show me how I should make a Whopper?"
Demonstration	"Show us how you update your playlists." *Ask for a demonstration of playlist updating*
Role-playing	"I'll be the customer and you be the receptionist, and you show me how they should respond." *Role play the ideal interaction between customer and receptionist*
Observations	*Look in server room, access key locker, and other secure locations*

Ask people how they would solve a problem

Participatory design

Doesn't mean we implement the requested solution literally
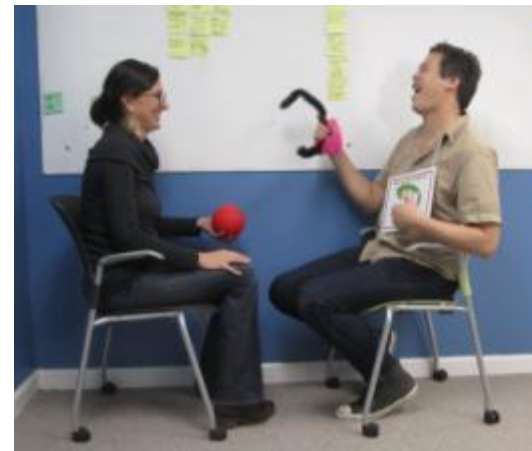
"I wish it had a handle"

Many ways to solve the underlying need ("I need to move it around")

Designers work with this data to generate alternatives

Engage people in the non-literal through games and role-playing

Uncover underlying principles and explore areas of opportunity that don't yet exist

Show people a solution

Consider the difference between **testing** and **exploring**

- Avoid "Do you like this?"
- Don't show your best guess at a solution; instead identify provocative examples to surface hidden desires and expectations

Image from Roberto and Worth1000.com

Make sure you are asking the right questions

- What does this solution enable? What problems does it solve?
- Especially for new products, needed before getting into specifics of your implementation

Use a range of methods

Logging	Before the interview, participant takes regular digital photos or fills out a booklet documenting their activities
Homework	Before the interview, participant saves up all their junk mail for two weeks to prompt our discussion Workbook to capture beliefs, priorities, etc.
Stimuli	In the interview, review wireframes, prototypes, simulations, storyboards
Exercises	What's in your wallet? What's in your fridge? Sketch your idealized solution Draw a map of where you listen to music; draw a map that associates emotional and subjective factors

Observe the culture

Notice how cultural artifacts reflect and define the environment; and reveal what is "normal"

Normal isn't "right or wrong" – it's the set of background rules that define much of what people choose or ignore

> Media
> Products
> Advertisements
> Street Culture
> Trends/ Fads

What are they selling?

Documentation: photos

Plan to take lots of photos

They will reveal things you don't remember noticing

Essential for storytelling

Make sure you have permission before you start snapping

Photography Shot List

Think of yourself as an interpid photo-journalist! You are there to capture details and action, as well as the context and spirit of those details and action. You never know what pictures will prove valuable and insightful later, so take as many as you can!

If you have a second interviewer with you, make this their job! Familiarize them with the shot list. Introduce them as the photographer in your introduction at the beginning of the interview. Make sure they bring a camera with a charged battery and plenty of memory.

Note: we spell this out in the interview guide, but be sure to ask before taking photos. It's just good manners!

Context Shots
Take shots of the home. Capture the room, and stuff in the room that tells you something about the people. Can you get pictures of the car? — Did you take them? ☐

Action Shots *(If you have a second interviewer)*
Shoot the interview in progress
Capture the interviewer (that's you!) and interviewee — Did you take them? ☐

Computer Environment
If you get to see the computer, capture where it sits in the home
Take shots if you are shown anything on the computer...or on mobile devices! — Did you take them? ☐

Headshot
Ask for a staged shot at the end of the interview!
Head and shoulders — Did you take it? ☐

Establishing Shot
On the way out, take a beauty picture or two of the house — Did you take it? ☐

Documentation: audio, video, notes

Essential to capture **exactly** what is said

Difficult (impossible) to maintain eye contact, manage interview, and write down everything

- Potentially a role for a second interviewer

Taking notes – not as the definitive record – can help you process, notice, think about follow-ups, etc.
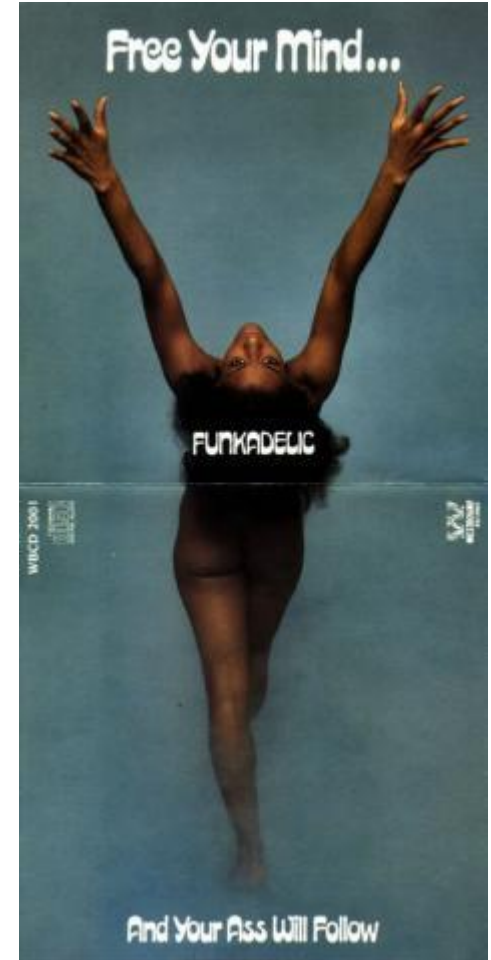
- I strongly recommend privileging being in-the-moment (e.g., eye contact, listening) over trying to capture everything yourself

Interviewing Best Practices

Principles inform tactics

I don't skate to where the puck is, I skate to where the puck is going to be – Wayne Gretzky

Fieldwork principles

Check your worldview at the door

Embrace how other people see the world

Build rapport

Listen

Check your worldview at the door

Before you start doing interviews, do a team-wide brain dump of all your assumptions and expectations

- Get closely-held beliefs out of your heads
- You needn't go back to verify your assumptions; goal is to make assumptions explicit

Make the interview about the interview

- As a transitional ritual, agree explicitly that you are going to *Learn about Paul* rather than *Identify NextGen Opportunities for Roadmap*

Embrace how other people see the world

Go to where your users are rather than asking them to come to you

Nip distractions in the bud

- Eat!
- Leave plenty of time so you aren't rushed when you arrive
- Find a bathroom beforehand

Be ready to ask questions you (think you) know the answers to

- Think about: "When are your taxes due?"
- What do you know? What are you afraid they'll say? What might you learn?

Build rapport

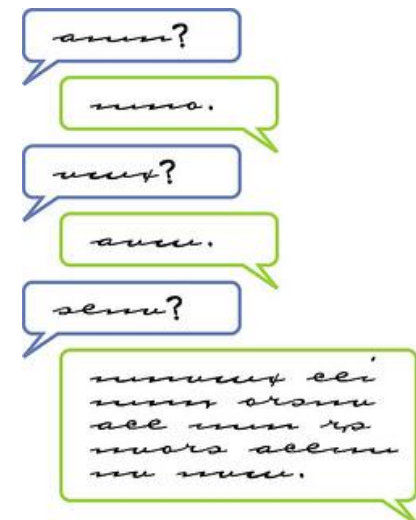## Be selective about social graces

- Just enough small talk
- Accept what you're offered

Be selective about talking about yourself

- Reveal personal information to give them permission to share
- Otherwise, think "OMG! Me too!" without saying it

Work towards the tipping point

- From question-answer to **question-story**
- You won't know when it's coming; be patient

Listen

You can demonstrate that you are listening by asking questions!

- Follow-up, follow-up, follow-up
- "Earlier, you told us that…"
- "I want to go back to something else you said…"

Signal your transitions: "Great, now I'd like to move onto a totally different topic"

This level of listening is *not* how we normally talk to each other

- Remember that you are interviewing, not having a conversation
- This is really hard

Listening body language

Yes!

Not so much.

After you ask your question, be silent

- Don't put the answers in the question

After they've answered you, be silent
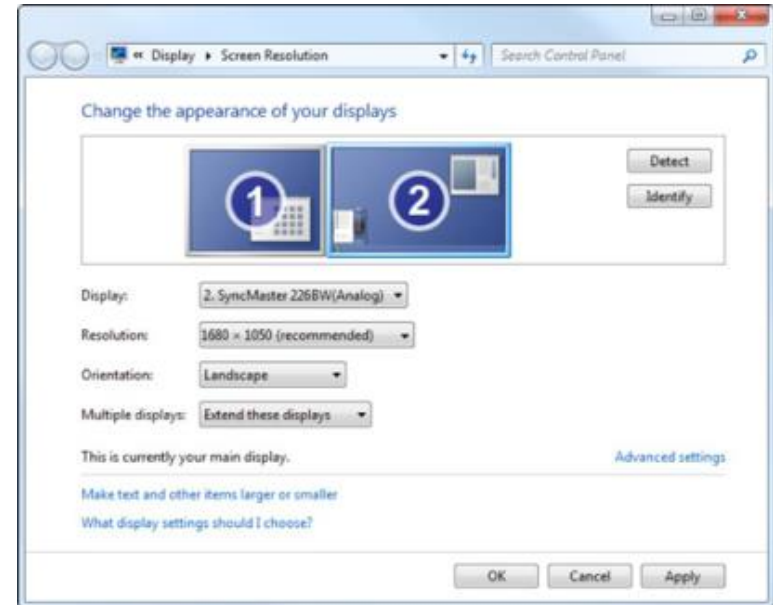
Talk like your subject talks!

If you want to fix something, wait until the end

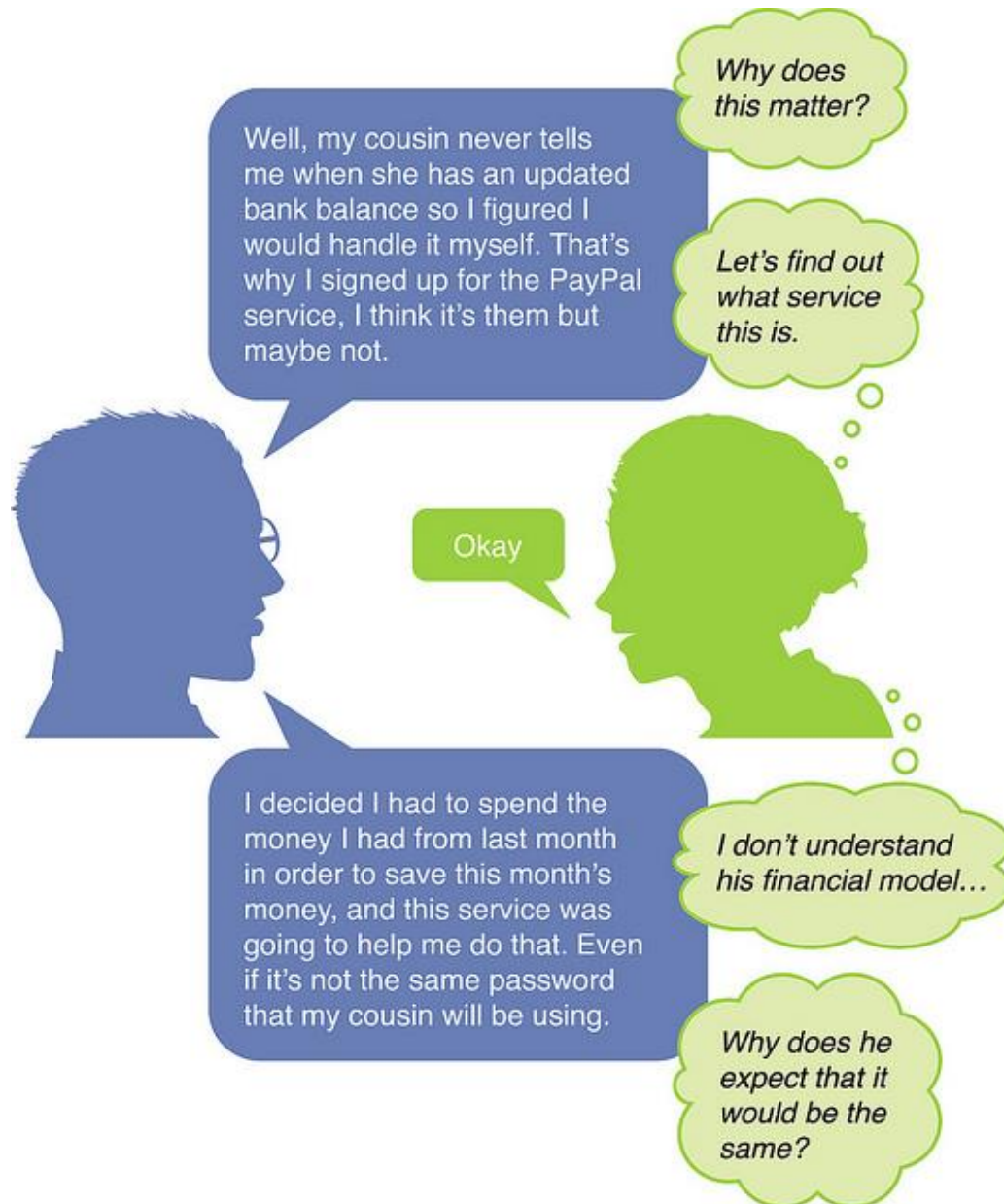It's frustrating to watch users struggle with your product

* Remember, you are there to learn from them

You will lose the interview if you start taking their questions

When it's time to go, show or tell them only what will help *them*

Prepare for exploding questions

Coping techniques

- Wait until these issues come up organically, without you having to ask

- Make notes on your field guide about what you want to loop back to so you don't forget

- Triage based on what's most pressing for your topic

- Triage based on what makes the best follow-up, to demonstrate listening

Collect and share war stories with other interviewers

www.portigal.com/series/WarStories

Thank you! Questions?

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