

OakenDoor

# The User Interview

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## The User Interview

The user interview should start with a [pre-interview briefing](#), lead into the question set or sets ([The Interview](#)), and then end with a [post-interview debriefing](#).

Many of the details outlined in this document focus on the ideal, which, as we all know, is often not possible. You should read this document with a sliding scale in mind; that scale should fall somewhere between getting the most out of user interaction and what is feasible during the process and for the development of the project.

### Interview Process Overview (User Research)

Define the interview questions with wider questions first and then narrow slowly. Do this for the overall succession of iterative interviews as well, refining the question sets as needed. Plan and practice the script with the team. One of the best approaches is to role-play based on personas developed from defined interviewees or the type of interviewees you want or feel would be most beneficial. Uncover mental models without leading (Interviewee: So, is that the correct answer? Interviewer: There aren't really any correct answers. It's about your opinions and interaction with the product or service). Ask open questions to get them talking in story format. A few yes/no questions are ok, but overall, they don't produce good feedback. If the interviewee is struggling with a question or task that arose from one of the questions, you should save them in a reasonable amount of time, but don't answer the question yourself. Get them talking about their struggle and possibly get an answer, or move on to the next question.


### Sample Email Request for Participation

Hello,

My name is \_\_\_\_\_ and I am contacting you as a potential candidate to participate in a user interview concerning [product/service] from [company name]. We are specifically looking for participants that have used or will use [product/service]. Would you be open to participating in an interview session(s) for [company name] Experience Design program led by [interviewer name] on [interview date and time]? You'll be asked a series of questions concerning your opinions and interaction with [product/service]. The interview will take approximately ## minutes of your time [in an online meeting, at your home, at your office].

By participating in the interview, you contribute to a pool of knowledge about [company name] [products/service]. [Company name] uses this information to improve [product/service] by creating a better user experience with your help.

If you can participate, please contact [contact's name and contact information] to agree. If you cannot participate, I would appreciate your reply with contact information for an individual or group that might be open to participating.



Thank you for your time,

[Sender name, title, contact information]

## Pre-Interview Briefing

Start by recapping about why the user is there and what will be reviewed. Be sure to indicate that you understand they have a working knowledge of the product (if that is true) and that while the interviewee probably knows why they are there, you just want to do a quick review to make sure everything is covered and field any preliminary questions before the interview starts. The interviewer should also have an indication of each interviewee's level of interaction with whatever is the focus of the interview (e.g., How many hours a week do they spend using the product or service? When did they start using the product or service? Did they use the product or service prior to the current company?). If this information was not gathered previously, ask about the user's role at the company and what their level of interaction is with the product or service that is the focus of the interview. Notice that I used the word interaction instead of experience. To a UX person experience is synonymous with interaction and we understand what it means. To a user engaged in an interview or Usability Test, it may indicate a knowledge scale. While we do want to get a sense of their skill level, we don't want to make them feel like they are being tested. Remember, words mean everything, and the process is all about putting the user at ease.

Put the user at ease by indicating that the interview is geared toward improving the product or service, not a review of user skills concerning the product or service or their job function. This is not only important during empirical usability testing, but at every stage where user interaction is required (interviews, usability testing, surveys, etc.). It's also important for UX people to remember that everyone is their client, from the user to their manager, and even the subject matter experts, Marketing, Sales, and development. If there is a time when human interaction is required, UX people should be in UX mode (thinking Cognitive Science). The "user", whoever they may be cannot say or do anything wrong during the process. The user should be able to say, do, or write anything without fear that they are being tested or that the interview is personally about them. They should also not worry about hurting the feelings of the interviewer simply because the interviewer works for the company that is offering the product or service. It is up to the UX person to encourage the user to relate information in a way that is familiar and easy to them; it is up the UX person to capture and be able to analyze what is related, understanding both what is said, what was not said, and body language. If you cannot video record the user, analyzing body language is obviously not possible, but being mindful of vocal timbre when reviewing the audio recording is very important. You may also want to think about what is missed when video recording of the user is not done.

During the User Interview you want to get the user to think out loud as much as possible. Do not ask leading questions, but if they seem to be mulling things over or are deep in thought (paused) concerning a question, ask them how they are thinking things through and could they think out loud during the process; if they just need silent time, that's fine – let them think it through, but don't let too much time pass.

Wrap up the pre-briefing by making the user aware of any recording devices and why they are being used. Ask for their permission and get a sense of their comfort level. Make sure that everyone on your team that is present during the interview has been introduced to the user and that there is a friendly, at ease climate for continuing on to the interview portion. Finally, ask the user whether they have any questions before the interview starts.

**Note:** You might want to consider a team for the interview made up of the interviewer, an observer, and a note taker. While this isn't necessary, it can yield desirable results and be very efficient. We'll see further evidence of the necessity for a team in [Post-Interview Debriefing](#).

### Sample Pre-Interview Briefing Form

Hi, \_\_\_\_\_, My name is \_\_\_\_\_, and I'm going to be asking you some questions today.

Before we get started, there are a few things to review.

We're asking people to answer questions regarding \_\_\_\_\_ to inform some of the work the team will be doing.

We're here to ask questions about your interaction with \_\_\_\_\_. You may be tempted to answer questions based on overall perceptions and what colleagues do or would do, but we're really interested in your opinions and experiences.

Therefore, there's nothing you can say that is wrong. All answers are welcome, and will help us consider our work.

If you have other statements or thoughts as we move along, please feel free to express them. We may not be able to spend much time on them, but we will try to hear as much of what you have to say as possible.

You see that I have some colleagues here with me. They're interested in what you have to say as well, so they'll be taking notes and observing. But they may not be joining the conversation.

To that end, you'll notice that we are recording (video and/or audio). With your permission we'd like to record the session for research purposes only. Your feedback will be kept anonymous – only used by the research team – unless you give approval otherwise.

If you have any questions at this point, please feel free to ask. If not, I'm going to ask you to sign the permission form. Take your time reviewing the form.

### The Interview

"Everyone has a story. When people are talking about something they know well and do well, they're almost always interesting. And if they're not, it's generally your fault because you're not asking the right questions and you haven't made them comfortable. And once I learned that lesson, my journalism became a lot easier." Malcolm Gladwell, C-Span 2009

Silence is golden. Don't rush to ask the next question. Allow users to elaborate on their ideas within a reasonable time frame. Let them tell their story. If the user gets off track though, redirect with respect (e.g., I appreciate what you are saying, but I'd like to change gears a bit).

An interview is a type of qualitative research; it involves not only the interview Q&A, but also keen observation. Ethnography is a valuable keyword that highlights the interviewing method as a way to gain insights about human factors in information design. What is the user's experience of the product or service? How does it impact their professional (day to day work) and personal experience (ability to feel confident and joyful)? The interview should reveal patterns in behavior that a product must address.

Avoid closed questions that only warrant short responses (e.g., **Q:** How often do you use our product? **A:** Three times a week.) Avoid conjunction-itis (i.e., Trailing questions together in one large multi-part question). Though it all might seem related, break them out so as not to confuse and overwhelm the interviewee. Avoid open-ended questions that don't have a hard stop and just kind of trail off into ellipses...do you know what I mean...? Avoid leading questions (e.g., Would you say this part of the interface is better than the previous screen?). Avoid agreeing with the user about a particular response. Do not express your opinions and do not tell them if their observations and answers correctly address or zero in on problems you or the company feel are true.

## Interview Styles

In addition to user comfort, you, the interviewer, should be comfortable as well. Why? It goes back to the user – if the user perceives a level of comfort in you, they in turn are more relaxed. So, what's your style?

- **Topic based:** This style only formalizes the high level topics that will be discussed and allows for a broader story to be told. It also allows the user to touch upon things you might not have thought about. The drawback is that if you are not comfortable with managing this style, you'll have trouble redirecting or knowing that you should redirect if the story evolution begins to get to far afield.
- **Freestyle:** This style does just what it says. You can be more of a listener and build each question upon the previous with no pre-defined script. The interview is controlled by context. You must be able to think very quickly and maintain a focused structure that gathers answers in line with everything you want to bring back for analysis.
- **List of questions:** This style is very focused, but can also allow for the interviewee to expound upon answers and offer additional information. This type can be very ridged and miss possibilities, but as long as UX interview forms outlined in this document (e.g., Silence is Golden) are followed, a specific list of questions can bear very fruitful results.

As notes are taken based on your style, they should follow **Descriptive**, **Inferential**, and **Evaluative** note taking methods. When making descriptive notes you observe specific actions or responses in line with the questions and write them down. Inferential note taking means that your observation comes in at the emotional and physical level. If the user seems frustrated or anxious concerning a topic, question, or function, make a note. Evaluative note taking typically records judgments that

the note taker makes concerning how repeated behaviors across multiple interviewees, or very generic reactions, apply to humans in general or the entire user group as a whole.

## Question Types

Using various question types or knowing when you should use specific question types is an invaluable part of interviewing.

- **Task:** Can you show me how you would make a paper airplane?
- **Participation:** Can you show me how I can make a paper airplane?
- **Demonstration:** Show the group how to make a paper airplane?
- **Role-Playing:** I'm the manufacturer of paper airplanes and you are the customer. Show me how the customer interacts and indicate to me what you think my response would be.
- **Sequence:** Walk me through a typical day of making paper airplanes.
- **Specific Example:** What was the last kind of paper airplane you made and why did you make it that way?
- **Peer Comparison:** How do other paper airplane makers in your company make their paper airplanes?
- **Look Back:** How is paper airplane making different than it was a year ago? What do you dislike and/or like about the change?
- **Projection:** What do you think paper airplane making will be like in five years?
- **Other Viewpoint:** What would you say your manager's opinion is concerning paper airplane making? **Note:** This is an arguable type. Many User Researchers feel that the focus should only be on the particular user, not what other people think or would do. Introducing this type of question may open up the floodgates to an interviewee speculating what others would do in successive questions.

## Post-Interview Debriefing

The post-interview process is much more casual than the pre-interview, although you still shouldn't agree with user responses to questions or indicate that what they related was right or wrong, even when asked. Simply indicate that there will be feedback sent in email or via a document. Ask the interviewee for their general feelings about the interview process and whether they have any final questions before the interview concludes. Thank them for their time and feedback.

The post-interview with the team should be more intensive and collaborative. Basically, a post-interview review should take place after each interview so that everyone on the team can compare notes and write down a few memorable experiences from each interview. Make sure to recap on what you heard and what you observed. Always make note of your first impression/gut reactions after each interview. The post-interview team exercise should happen again at the end where all interviews and interviewees are discussed by the team, and overall memorable experiences, what you heard, and what you observed are written down.