C10: Top Field Interview Mistakes: Recognizing and Preventing Them
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Introduction

Conducting interviews with customers and end users is now considered to be a standard practice. Few organizations argue against interviewing customers; the battle has been won that we must be able to talk to our customers. Finding the time and human resources to go out to the customer isn't easy, so we must be sure that we are getting as much as possible out of those interviews. But what makes for an effective interview? Even if you've been trained in an interview method like Contextual Inquiry, it can be easy to fall back into old interview patterns.

It can be difficult to keep the customer interview on track. The interview starts out great: you're in the field, you're with the real user, you're at the user's desk, home, or wherever the real work takes place. But then at some point during the interview you realize things have gone awry. You are asking questions and the user is answering you, but you aren't seeing him or her do their real work. The user is either giving you one-word answers, or long explanations about what he or she "typically" does. It feels like your questions aren't getting very good data, it's all high level and not detailed. You sense you've fallen into an unproductive interview pattern but you can't seem to get out of it. Or, you don't even recognize this has happened to you until you come back and report to your team what took place in the interview. Then you realize that most of the time you can't really answer their questions like: "What exactly does the user do when...", "Did you talk about...", or "What specific steps does the user take to ...?".

This course is intended to help participants get the most out of field interviews. The Top Mistakes format serve as a framework to explain the underlying principles of Contextual Inquiry interviewing and point out the most common or problematic pitfalls that interviewers can fall into. The course also provides interviewing style characterizations that illustrate ineffective styles. Knowing these ineffective styles provides tools that can be used as personal triggers for recognizing ineffective behavior to be avoided.
Top mistakes in interviewing

1. Pretending you are in the field when you are not
2. Accepting a “representative user” to interview
3. Using “I can’t see the work live so I’m not going to do a contextual interview” as an excuse
4. Not getting low-level details
5. Assuming users can tell you if you just ask
6. Asking “Why?” or open-ended questions
7. Not being honest about the user’s reaction
8. Falling into ineffective interview styles
9. Expecting the interview to be run itself
10. Forgetting that one good field interview is much better than no interviews

Being user-centered starts with getting useful data for design
Principles to guide interviews

Context
- Understand customer needs in the context of their work

Partnership
- Work with customers as partners in inquiry

Interpretation
- Uncover the meaning and implications of customer action and language

Focus
- Listen and probe from a clear intention

A set of principles, not a set of steps
Mistakes and the principles

Context
1. Pretending you are in the field when you are not
2. Accepting a "representative user" to interview
3. Using "I can't see the work live so I'm not going to do a contextual interview" as an excuse
4. Not getting low-level details

Partnership
5. Assuming users can tell you if you just ask

Interpretation
6. Asking "Why?" or open-ended questions
7. Not being honest about the user's reaction
8. Falling into ineffective interview styles

Focus
9. Expecting the interview to run itself

And...
10. Forgetting that one good field interview is much better than no interviews
Mistake 1: Pretending you are in the field

These places are not the field:
- The usability lab
- A user conference
- A conference room in the workplace
- Even the office or the home may not be the field
  - If the work is done elsewhere

The goal is to watch real life work in process
What to do avoid the mistake

Set the right criteria for screening/recruiting users
  ♦ If the user doesn’t meet the conditions, don’t accept him/her

Expect that users won’t understand anyway
  ♦ Be ready to politely move the user into the work space
  ♦ It’s actually rude not to move the user
    ▪ Otherwise you are wasting their time

Travel to the field
  ♦ Even when you have little (no) time or budget
  ♦ Driving or taking the train can expand your reach and be in budget
  ♦ Remote meeting tools are your fallback, but
    ▪ Start with in-person interviews first
      - And then use a collaboration tool if the work is dominated by web or tool interaction
    ▪ Be sure the user is in the real workplace, doing real work

Field interviews mean you have to be in the field!
Mistake 2: Accepting a representative user

These people are not who you want to interview

- Someone who used to do the job
  - Your company’s business analysts, subject matter experts, etc.
- Someone who tells others how to do the job but doesn’t do it
  - Managers
- People in your company who do the same job as the customers
  - Unless you are designing an internal system

What to do to avoid the mistake

- Don’t assume that you have to interview the non-users
- Let them be heard in other ways
  - Stakeholder interviews help set project focus
  - Do “Courtesy” interviews
    - Short, non-contextual interviews that you do because you have to
  - Just be careful to separate this data from the field data
  - Let them be on the team and gather the real data too

Bringing them into the process ensures buy-in
Mistake 3: The “I can’t see live work” excuse

Sometimes the work you need to see:
- Is intermittent or infrequent
- Takes place over long periods of time
- Is highly sensitive or confidential
- So you assume that you can’t see the work

What to do avoid the mistake
- Conduct a retrospective account interview
  - Re-create the actual work done in the past
  - Within the last two weeks is best
  - Re-created with actual work artifacts
- Be careful with retrospective accounts
  - You only care about the current and past
    - Don’t ask the user to make up the future
  - The user will tend to skip over parts of the story
    - It’s your job to recognize skips and help the user to fill them in

As long as it is a detailed story of a real instance it is field data
Mistake 4: Not getting low-level details

Recognize an abstraction when you hear one
- "Generally, typically, normally, our company's policy"
- Abstractions may tell us there's a problem or opportunity
  - But not give us the detail we need for design

What to do to avoid the mistake
- Don't ask what you typically, generally, or normally do — you are asking for a generalization
- Stick with a real instance and play it out live or retrospectively
- And use the "magic words" from Mistake 5

Field data is the only way to get detailed design data — don't miss the opportunity
Mistake 5: Assuming users can tell you...

...if you just ask

Don't expect users to articulate what they do without your help

- The more expert the user...
  - ...the less able they are to articulate what they do and why
- They do the work, not think about the work

What to do to avoid the mistake

- The user is the expert — let them lead
- Your job is to help the user articulate their work practice, so use the "magic words"
  - "When was the last time you...?"
  - "Can you show me what you did?"

Help users become conscious of their actions and motives
Mistake 6: Asking “Why?” or open-ended questions

Interpretation is the data
- Create a shared understanding of what is going on
- Inquire into the meaning of customer action and words

What to do to avoid the mistake
- Offer interpretations, not just open-ended questions

Interpretations focus the discussion, they don’t skew the data
Mistake 7: Not being honest about the reaction

Sometimes a “no” isn’t said as “no”

♦ Users want to be helpful and nice!

What to do to avoid the mistake

♦ Listen for the “no”
  ▪ Huh?
  ▪ Umm... could be
  ▪ “They” would like it
  ▪ “Yes” comes with elaboration

♦ Watch for non-verbal cues

If you are invested in the outcome, listen even harder for the NO
Mistake 8: Falling into ineffective interview styles

The Traditional Interviewer
  ✷ “I Ask/You Answer”

The Court Reporter
  ✷ Writing down everything without finding underlying intents

The Police Interrogator
  ✷ Grilling the customer

The Agenda Follower
  ✷ Paying attention to your personal focus, not the user’s work

The “Polite” Interviewer
  ✷ Letting the user go on tangents that are not in your focus
  ✷ Thinking it is rude to be curious

The Mad Inventor
  ✷ Constantly offering design ideas and solutions
What to do to avoid the mistake

Knowing relationship models creates awareness
  - Use these styles as triggers to change your approach

Apprenticeship is the preferred relationship model
  - Listen, learn, be humble, don’t judge
  - And assume that people do things for a reason

Field interviews create “airplane” intimacy — lean on it for quality data
Mistake 9: Expecting the interview to run itself

If first you don't succeed try, try again

How you run the interview is key

- The way you conduct the interview "trains" the user
- Users will follow your lead on how the interview will work
- But telling them isn't enough
  - You have to reinforce it with your actions

Users have no frame of reference for this kind of interview

- So it takes awhile to adapt
- Some users will adapt quickly, others take a long time
  - And then it will feel like hard work on your part for the entire interview
  - But that's o.k., that's your job!

Steer the interview with your focus — ask about detailed design data, ignore what you don't want to know about
Mistake 10: Forgetting that one good field interview...

...is much better than no interviews
- And two interviews is twice as good
- And so on....

Redefine success for yourself
- Small steps are often needed
  - And each step is a success
- And be sure to celebrate your success too

Success is getting any user data into the project — and then having a customer centered process as part of standard software development
Get the most out of data after the interview

Don’t write a trip report or debrief by yourself
  - Use a process like an interpretation session with at least one other person
  - Other perspectives reveal more insights
    - For both this interview and subsequent ones

Capture the data in a way that useful for organizing it
  - Virtual Post-It notes for building an affinity diagram

Build an affinity
  - Reveals underlying pattern: intent, strategy, structure, and scope
  - Shows what matters to the entire population, while keeping variations that matter
  - Eliminates focusing on individual users

A customer-centered process ensures that the data is used for design
Suggested Readings

Books from InContext


Books with chapters by InContext


Articles


H. Beyer and K. Holtzblatt, "Contextual Design" in *interactions*, Jan/Feb 1999 v1.1, pg. 32