

User Interview Guide

Strategy Document: Stakeholder Interviews

Before you begin any project, it's critical to meet with project stakeholders. A stakeholder is anybody who has decision-making authority for some aspect of the project. This includes any executives who are sponsoring the project, any business owners and any technical leads. In your interviews with stakeholders, your goals should be to understand:

- The organization's specific goals for the project
- Technical opportunities and constraints

Typical questions include:

- What is your preliminary vision for the product/site/service?
- What is the budget and schedule
- What are the technical constraints
- What are the business drivers

Strategy Document: Domain and other Research

Stakeholder interviews enable you to understand the business, technical and political context of the project. You also need to understand what's going on outside of the company in the target market space. To accomplish this, it's important to look at competitive products/sites/services in the same space and review written literature (articles, books, product/site/service reviews) about the space. If you are working in a specialized domain (banking, telecom, healthcare), it is also important to spend time interviewing any experts in the field you have access to (also known as "Subject-Matter Experts" or "SMEs" (pronounced "smees").

Strategy Document: User Interviews

While it's important to interview stakeholders and conduct domain research, the bulk of your research efforts will be spent on understanding users. Your goal is to understand users well enough to be able to step into their shoes during the design process. It is absolutely critical that you conduct user research, because it is only through a solid understanding of users and their needs that you will be able to make good design decisions. The standard interaction design user research technique is informal conversation with users in the context of observing them in their environment. These "observational interviews" provide quick, rich results.

User interviews are qualitative. Quantitative research techniques, such as surveys and website analytics are highly structured and are designed to gather and analyze quantitative (i.e. numeric) data. Qualitative research, on the other hand, seeks to collect unstructured data, such as: "Why do users engage in this activity?" "What are their behaviors/attitudes/goals?" The user research techniques we'll be applying are qualitative in nature, not quantitative.

Identify key patterns. Through observational interview techniques, as designers we can understand:

- Problems and frustrations users have with their current system
- The context of how the site fits into their lives or workflow: when, why and how the site is/will be used
- A basic understanding of users' current tasks and activities
- A clear understanding of user goals: their motivations and expectations concerning the use of the site
- Domain knowledge from a user perspective: What do users need to know to accomplish their goals

Identifying Candidates. To ensure the right site design, you need to interview a representative collection of users. To do this, you must consider the roles that exist in the user population, any key behavioral variables, the level(s) of technical or domain expertise across the user population, and any relevant environmental considerations. **Roles.** What roles exist in the user population? For example, are you designing a fun site for Disney where kids and parents play games together? The two roles would be "kids" and "parents." You would need to interview a representative number of each. If you are designing a healthcare site where patients get advice from doctors and nurses, the roles might be, "patient," and "health care provider." **Behavioral variables.** Think about the likely behaviors of people in the user population. For example, if you are designing an ecommerce site, think about shopping behaviors and generate a hypothesis about the ranges of likely behaviors. For example, are some people going to shop more frequently than others? Are some people going to be more into the shopping process than others? Are some people only coming to buy gifts, while others are going to be coming on a regular basis to buy staples? Make sure that you are prepared to interview people who represent all of the key behavioral variables you identify. **Technical and domain expertise.** Think about the relative level(s) of expertise of the user population. Are you designing a site that will be used exclusively by Ph.D.s who work at NASA? Will the site support a range of users, some of whom are Internet novices, and others who are old hands? Be prepared to interview people who represent the various levels of technical and domain expertise present in the user population. **Environmental considerations.** Think about where users will be interacting with the site. Are you designing an internet kiosk to be used in a museum? Are you designing a system for stay-at-home moms? Be sure to interview people in the environment in which they will use the site.

Logistics

For qualitative interviews, you don't need to talk with dozens of people. Scheduling interviews with 4-6 people for each role/variable you identify (variables typically overlap) is about right. Each interview should be about one to two hours in length.