

# Issue #12: 🔎 Discovery Interview Blueprint

**Repository:** CherrelleTucker/codesign-toolkit **URL:**

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## 🔍 Discovery Interview Blueprint

### **Structured Approach to Deep-Dive User Conversations**

**Tool Category:** Users & Stakeholders | **Phase:** Discovery | **Difficulty:** 📈 Intermediate

*Conduct meaningful one-on-one conversations with users to understand their workflows, needs, constraints, and decision-making processes in depth.*

### 📋 Tool Summary Card

Attribute	Value
🎯 Purpose	Gather deep, qualitative insights into user needs, workflows, and contexts through structured interviews
⌚ Time Required	1 hour prep + 45-90 minutes per interview + 30 minutes documentation
👥 Participants	1 interviewer + 1 interviewee (5-8 interviews total recommended)
📊 Outputs	User insights, workflow maps, needs validation, design requirements
🔄 Frequency	Once per project during discovery phase, follow-up interviews as needed
💼 Materials	Interview guide, recording setup (with permission), note templates

### 🎯 When to Use This Tool

#### ✓ Perfect For:

- Understanding complex user workflows and decision-making processes
- When surveys won't capture the full picture of user needs
- Early project phases where you need deep user insights
- Validating assumptions about user problems and contexts

#### ⚠️ Consider Alternatives When:

- You need input from large numbers of users (use surveys)
- Users have very simple, well-understood workflows
- Time is extremely limited (use shorter validation methods)

- Stakeholders prefer group discussions over individual conversations
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## Interview Structure & Question Framework

### Pre-Interview Preparation (30 minutes)

#### **## Interview Preparation Checklist**

##### **### Research the Interviewee**

- [ ] Review their role and organization
- [ ] Understand their likely workflows and responsibilities
- [ ] Research their organization's mission and constraints
- [ ] Prepare personalized questions based on their context

##### **### Technical Setup**

- [ ] Schedule 90 minutes (60 min interview + buffer time)
- [ ] Test recording equipment (with participant permission)
- [ ] Prepare note-taking system (templates ready)
- [ ] Confirm dial-in/meeting details work

##### **### Interview Materials**

- [ ] Core interview guide customized for this participant
- [ ] Background information sheet for reference
- [ ] Project overview to share if needed
- [ ] Follow-up contact information prepared

### Interview Flow Template (60-75 minutes)

#### **## Discovery Interview Guide: [Participant Name/Role]**

**\*\*Date:\*\*** [Date] | **\*\*Interviewer:\*\*** [Name] | **\*\*Project:\*\*** [Project Name]

##### **### Opening (5 minutes)**

###### **\*\*Welcome & Context Setting:\*\***

"Thank you for taking time to talk with me. We're in the early stages of developing [brief project description] and want to make sure we understand how people like you actually work before we build anything."

**\*\*Recording Consent:\*\*** [If recording] "Would it be okay if I record this conversation? It helps me focus on our discussion instead of taking notes, and I can share the recording with you afterward."

**\*\*Interview Overview:\*\*** "I'd like to spend about an hour learning about your work, especially around [relevant domain]. There are no wrong answers - you're the expert in what you do."

##### **### Background & Context (10 minutes)**

###### **\*\*Role Understanding:\*\***

- "Can you tell me about your role and what a typical day/week looks like for you?"
- "What are your main responsibilities related to [relevant domain]?"

- "How long have you been doing this type of work?"

**\*\*Organization Context:\*\***

- "Help me understand how your organization approaches [relevant domain]."
- "Who do you work with most closely on [relevant tasks]?"
- "What are the biggest priorities or pressures your organization faces?"

**### Current Workflow Deep Dive (20 minutes)**

**\*\*Process Mapping:\*\***

- "Walk me through how you currently handle [specific relevant task]."
- "What triggers that process? How often does it happen?"
- "What information do you need to get started?"
- "What tools or systems do you use?"
- "Who else gets involved in this process?"

**\*\*Pain Points & Challenges:\*\***

- "What parts of this process work really well?"
- "What parts are frustrating or time-consuming?"
- "Where do you get stuck or need to wait for other people?"
- "What would make this process faster or easier?"

**\*\*Information & Data Usage:\*\***

- "What types of data or information are most critical for your decisions?"
- "Where does that information come from currently?"
- "How timely does the information need to be?"
- "What format works best for how you use it?"

**### Decision-Making Context (15 minutes)**

**\*\*Decision Processes:\*\***

- "Tell me about a recent important decision you had to make related to [domain]."
- "What information did you need to make that decision?"
- "Who else was involved in the decision?"
- "How much time did you have to decide?"
- "Looking back, what would have made that decision easier or better?"

**\*\*Constraints & Requirements:\*\***

- "What constraints do you work within? (budget, time, regulations, etc.)"
- "What requirements do you have to meet in your work?"
- "How do you measure success in what you do?"

**### Technology & Tools Context (10 minutes)**

**\*\*Current Technology:\*\***

- "What tools or systems do you use most in your daily work?"
- "Which ones work well for you? Which ones are frustrating?"
- "How comfortable are you with learning new technology?"
- "What would ideal technology support look like for your work?"

**\*\*Integration Needs:\*\***

- "What other systems would a new tool need to work with?"
- "How important is it that new tools match your existing workflows?"
- "What would make you likely to adopt a new tool vs. stick with what you have?"

### **### Future Vision & Wrap-up (10 minutes)**

#### **\*\*Ideal Future State:\*\***

- "If you could wave a magic wand and fix the biggest problems in [domain], what would you change?"
- "What would success look like for your organization in this area?"
- "How do you see your work evolving over the next few years?"

#### **\*\*Project Connection:\*\***

- "Based on what I've described about our project, what excites you most?"
- "What concerns would you have about a solution in this area?"
- "What advice would you give us as we develop this?"

#### **\*\*Follow-up:\*\***

- "Would you be interested in staying involved as we develop this solution?"
- "Who else do you think we should talk to?"
- "What's the best way to keep you updated on our progress?"

## Interview Facilitation Best Practices

### **Effective Questioning Techniques**

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#### Open-Ended Question Strategies

##### **Use These Question Starters:**

- "Tell me about..." - Gets detailed narratives
- "Walk me through..." - Reveals process steps
- "How do you..." - Uncovers methods and approaches
- "What happens when..." - Explores edge cases and problems
- "Help me understand..." - Shows you value their expertise

##### **Avoid These Patterns:**

- "Do you think...?" - Leading questions that suggest answers
- "Would you like...?" - Yes/no questions that limit responses
- "Don't you find...?" - Questions that imply what you want to hear
- Multiple questions at once - Confusing and hard to answer completely

##### **Follow-Up Probes:**

- "Can you give me an example?"
- "What did you do next?"
- "How did that make you feel?"
- "What would have been different if...?"
- "Why do you think that happened?"

#### Active Listening Techniques

##### **Show You're Listening:**

- **Verbal acknowledgments:** "Mm-hmm," "I see," "That makes sense"
- **Paraphrasing:** "So what I'm hearing is..."

- **Clarifying:** "When you say X, do you mean...?"
- **Summarizing:** "Let me make sure I understand..."

#### **Encourage More Detail:**

- **Silent pauses:** Give people time to think and elaborate
- **Emotional acknowledgment:** "That sounds frustrating"
- **Curiosity:** "That's interesting, tell me more about that"
- **Specific details:** "What did that look like exactly?"

#### **Manage the Conversation:**

- **Gentle redirects:** "That's helpful context. Going back to..."
- **Time awareness:** "We have about 10 minutes left, so I want to make sure we cover..."
- **Energy check:** "How are you doing? Do you need a quick break?"

## **Handling Challenging Interview Situations**

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### **"Participant gives very brief answers"**

#### **Strategies to Encourage More Detail:**

- **Ask for examples:** "Can you walk me through a specific time when that happened?"
- **Ask about emotions:** "How did that make you feel?"
- **Ask about others:** "What do your colleagues think about that?"
- **Ask about context:** "What led up to that situation?"
- **Share your confusion:** "Help me understand that better..."

#### **Check for Underlying Issues:**

- Are they worried about confidentiality?
- Are they uncertain about their expertise?
- Are they pressed for time?
- Do they understand why you're asking?

### **"Participant goes off on tangents"**

#### **Gentle Redirection Techniques:**

- **Acknowledge value:** "That's really helpful context. Let me ask about...."
- **Time boundaries:** "I want to make sure we cover everything. Can we come back to..."
- **Note for later:** "That's important - let me make a note to follow up on that"
- **Bridge back:** "That connects to something I wanted to ask about..."

#### **When Tangents Are Valuable:**

- Sometimes tangents reveal important insights
- Note themes that come up repeatedly
- Ask if seemingly unrelated topics actually connect to your focus area

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## **Documentation & Analysis Framework**

### **Real-Time Note Taking Template**

## **## Interview Notes: [Participant] - [Date]**

**\*\*Role:\*\*** [Title/Function] | **\*\*Organization:\*\*** [Agency/Department] | **\*\*Experience:\*\*** [Years in role]

### **### Key Quotes & Insights**

#### **\*\*Workflow Insights:\*\***

- "[Direct quote about current process]"
- "[Quote about pain points or challenges]"
- "[Quote about what works well]"

#### **\*\*Decision-Making Insights:\*\***

- "[Quote about how decisions are made]"
- "[Quote about information needs]"
- "[Quote about constraints or requirements]"

#### **\*\*Technology & Tools:\*\***

- "[Quote about current tools]"
- "[Quote about technology preferences]"
- "[Quote about integration needs]"

### **### Process Notes**

#### **\*\*Current Workflow Steps:\*\***

1. [Step 1 with timing/frequency notes]
2. [Step 2 with dependencies noted]
3. [Step 3 with pain points identified]

#### **\*\*Key Stakeholders Mentioned:\*\***

- [Person/Role] - [Relationship to interviewee]
- [Organization] - [How they interact]

#### **\*\*Tools & Systems Mentioned:\*\***

- [Tool name] - [How used, pros/cons]
- [System name] - [Integration requirements]

### **### Immediate Observations**

#### **\*\*Surprising Insights:\*\***

- [Things that contradicted assumptions]
- [Unexpected workflow elements]
- [Novel approaches or solutions]

#### **\*\*Consistent Themes:\*\***

- [Patterns matching other interviews]
- [Confirmation of suspected needs]

#### **\*\*Questions for Follow-up:\*\***

- [Things to clarify or explore further]
- [Additional people to interview]

### **### Project Implications**

#### **\*\*Requirements Identified:\*\***

- [Functional requirements based on workflow]

- [Performance requirements based on constraints]
- [Integration requirements based on existing tools]

**\*\*Design Considerations:\*\***

- [UI/UX implications from user preferences]
- [Workflow integration considerations]
- [Training or support needs identified]

## Cross-Interview Analysis Process

**## Interview Series Analysis: [Project Name]**

**\*\*Interviews Completed:\*\*** [Number] | **\*\*Date Range:\*\*** [Dates] | **\*\*Analyst:\*\*** [Name]

**### Participant Overview**

Participant	Role	Organization	Experience Level	Key Focus Areas
----- ----- ----- ----- -----				
[Name/ID]   [Role]   [Org]   [Novice/Expert]   [What they emphasized]				
[Name/ID]   [Role]   [Org]   [Novice/Expert]   [What they emphasized]				

**### Consistent Themes Across Interviews**

**\*\*Workflow Patterns:\*\***

- [Process steps mentioned by multiple participants]
- [Common pain points or bottlenecks]
- [Shared success factors or effective practices]

**\*\*Information & Decision Needs:\*\***

- [Data/information consistently mentioned as critical]
- [Decision-making patterns across roles/orgs]
- [Timing requirements that appeared repeatedly]

**\*\*Technology & Integration:\*\***

- [Tools/systems mentioned by multiple participants]
- [Integration requirements that appeared consistently]
- [Technology preferences or constraints shared across interviews]

**### Divergent Perspectives**

**\*\*Role-Based Differences:\*\***

- [How different job functions approach the same problems differently]
- [Varying priorities or success criteria by role]

**\*\*Organizational Differences:\*\***

- [How different agencies/departments handle similar challenges]
- [Varying constraints, resources, or requirements]

**\*\*Experience-Based Differences:\*\***

- [How novice vs. expert users approach tasks differently]
- [Different comfort levels with technology or change]

**### Key Insights for Design**

**\*\*Critical User Needs:\*\***

1. [Need supported by multiple interviews with evidence]

2. [Another validated need with participant quotes]
3. [Third critical need with workflow implications]

**\*\*Design Requirements:\*\***

- [Functional requirement with user justification]
- [Performance requirement with constraint explanation]
- [Integration requirement with system details]

**\*\*Potential Risks or Challenges:\*\***

- [Adoption barriers identified through interviews]
- [Technical challenges revealed by user contexts]
- [Organizational change management needs]

**### Recommendations for Next Steps**

**\*\*Additional Research Needed:\*\***

- [User types or scenarios not yet covered]
- [Questions that need further exploration]
- [Validation needed for assumptions]

**\*\*Design Implications:\*\***

- [How insights should influence solution design]
- [Priority features based on user needs]
- [Workflow integration requirements]

**\*\*Stakeholder Engagement:\*\***

- [Who should be involved in co-design activities]
- [How to maintain relationships with interview participants]
- [Communication approach based on participant preferences]

## Integration with Other Co-Design Tools

**This Tool Informs:**

- [\*\*Stakeholder Mapping Workshop\*\*](#) - Validates stakeholder identification and adds detail
- [\*\*Requirements Definition Canvas\*\*](#) - Provides user input for collaborative requirements definition
- [\*\*Co-Design Workshop Facilitator Manual\*\*](#) - Identifies participants and focus areas for workshops

**This Tool Builds On:**

- **Project planning and initial needs assessment** - Provides context for interview focus
- **Preliminary stakeholder identification** - Helps select interview participants
- **Basic problem statement** - Frames interview questions and objectives

**This Tool Feeds Into:**

- [\*\*User Journey Mapping Kit\*\*](#) - Detailed workflow information for journey mapping
- [\*\*Context Analysis Framework\*\*](#) - Organizational and environmental insights
- [\*\*User Testing Protocol\*\*](#) - Understanding of user tasks and expectations for testing

## Source Attribution

### Primary Sources:

- **SNWG Discovery Interview Blueprint** - Structured interview methodology and question frameworks
- **SERVIR Consultation and Needs Assessment Tool** - User research approaches for Earth observation applications
- **Solution Co-Development Toolkit Narrative** - User needs assessment integration with co-design processes

### Supporting Sources:

- **NSITE Solution Project Plan Template** - Stakeholder understanding requirements and relationship building
- **SERVIR Stakeholder Mapping Tool 2021** - User identification and characterization approaches

### Methodology Foundation:

- User experience research interview techniques
- Qualitative research methods from social sciences
- Human-centered design discovery practices adapted for government and technical contexts

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## Community Discussion

### Share your interview experience:

- What questioning techniques work best for your user types?
- How do you adapt interviews for different organizational cultures?
- What unexpected insights have you gained from discovery interviews?
- How do you balance structure with organic conversation flow?

### Blueprint improvements:

- What questions would you add for specific Earth observation contexts?
- How do you handle interviews with users who have security constraints?
- What tools work best for remote interviews and documentation?

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 **Tool Maintainer:** @your-username |  **Last Updated:** [Today's Date] |  **Version:** 1.0