

Customer Interview Template

PRINCIPLES: Human Centered Design. *Look to users for design inspiration.*

Interviews are a means of **engaging** a user to gather information using either direct or indirect questioning techniques. **Direct** questioning techniques are focused on having the user speak about specific topics, while **indirect** questioning techniques are focused on getting the user to tell stories about various aspects of a topic. Both kinds of techniques are used together for a **deep** exploration of ideas so that the interviewer can develop **insights** about the user.

PURPOSES: To Understand. *Interviews are a technique to learn more about the user.* Interviews develop value in several ways:

- **To uncover latent needs.** An interview can help identify gaps between the use, usability & meaning of an idea, object or experience for a user to reveal unmet needs.
- **To find surprises.** Interviews can find differences in who the people are and what they have stated they want and what these people actually do, and what they say they actually need.
- **To gain empathy for the user.** Interviews can help the designer discover the emotions that guide a user's behaviors.
- **To identify the type of user.** Interviews can help identify if a user is "extreme" or "mainstream". Extreme users are people who are pushing the system and may reveal unmet needs before the mainstream users do.

MINDSETS: To Engage. *Have a conversation rather than just ask questions.*

In design thinking, interviews are a tool that allows you to engage with the user to hear about the successes and failures in people's everyday lives. Direct questioning tasks do help you gain facts; however, indirect questioning practices help you hear the stories behind these facts. Below are talking and listening suggestions:

Let the user do the talking:

- **Encourage Stories:** Whether or not the stories people tell are true, they reveal how the user thinks about the world. Stories reveal what people find normal, acceptable and believe to be true. A good interview should let the user elaborate on the answers similar to a conversation.
- **Look for inconsistencies:** Sometimes what people say and what they do are different. These inconsistencies often hide interesting insights. Interviewers need to ask about these inconsistencies during an interview.
- **Follow up with why questions:** Even when the interviewer thinks he or she knows the answer, the interviewer needs to ask people why they say or do things. The answers might surprise the interviewer.

- **Listen to verbal and nonverbal cues:** Be aware of emotions and body language as a way of using the interview to build empathy for the user.

The interviewer does the listening:

- **Don't suggest answers:** Even if someone pauses before answering, don't help her by suggesting an answer. This can unintentionally get a person to say things that agree with the interviewer's expectations.
- **Ask questions neutrally:** "What do you think about this idea?" is a better question than "Don't you think this idea is great?" because the first question doesn't imply there is a right answer.
- **Don't be afraid of silence:** Interviewers often feel the need to ask another question when there is a pause. Sometimes if you allow there to be silence, a person will reflect on what they've just said and say something deeper.

RULES To guide your behavior during interviews

Rule #1 Talk to them following a path Hint: Have a beginning, a middle, and an end

You need to introduce yourself, state your school, describe what you are doing, and ask if you can ask some questions. If the user says yes, then you can carefully and seriously ask your questions. Talk slow, be polite, and look the person in the eyes when speaking. If he or she doesn't understand you, calmly repeat your question. When you feel you have received enough answers, ask the user if they have any questions for you. When you are done be sure to thank the user for their time and say good bye with a smile!

Rule #2 Ask them open, not closed questions Hint: Ask for descriptions

An open ended question asks someone to provide you with a description. A closed question can be answered with one word or a simple yes or no. For example, "Can you remember what you ate yesterday?" can be answered with a "yes or no". If you ask, "Describe a meal you had yesterday..." will evoke richer information.

Rule #3 Have them tell you a story Hint: Use follow up questions for more info

*After you have asked your open ended question and your user has provided an answer, ask a follow up question to get the user to talk more. You can ask for more information using "say, do, think, and feel" style questions. For example, "Did you **do** anything different for this meal?" or "Did anyone **say** anything interesting during your meal?" can help tell you more about eating behaviors. To find out about emotions, you can ask "How did you **feel** about the meal?" or "What did you **think** about the meal?" Let the user talk as long as he or she likes and make sure you don't talk over them or finish their sentences. This is a chance for the user to tell his or her story. Avoid the interview becoming an interrogation, instead allowing the user to tell you in the way he/she wants.*

Rule #4 One interviewer talks, the others write Hint: Work as a team

You should work in teams so that one person asks questions, one person writes down what is being said, and another person can observe the user's actions, behaviors, and personal characteristics. You need to include the date, time, and where you are doing the interview. You should ask or guess their age, record if they are a man or woman, and describe any other information about the person you are interviewing.

Rough Interview Schedule/ “Path” (duration and basic activities/question areas):

1. (5 minutes): About Client
2. (15 minutes): Background on problem
3. (20 minutes): Specifics of solution
4. (20 minutes): Use cases

Specific Questions (order can be adjusted to maintain ‘natural’ conversation flow):

1. Who are you/what is your educational background?

2. How did you come up with this idea? How did you discover this was something that needed to be solved.

3. Web or phone application?

4. What will the average size of PDF files input and MP3 files output be?

5. What device(s) will be used to access the app

6. Preferred accents or voices?

7. Give an example of a person and situation where this product would be used

8. How quickly would you expect the program to convert files?

9. What apps/websites do you like the user interface off

10. what is an acceptable margin of error

11. What alternative files would you like to see output if enough time is given?

12. Are there any other specific requirements you would like the application to meet that Have not been mentioned previously
