

# Applied Design Thinking Part 4

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Photo taken by Michael Hay of a "team Doraemon" bronze statue at a soccer stadium in Kawasaki, Japan

You wake up and get a phone call from your host and they say, "Sorry, but we need to reschedule." Your heart sinks as all of the careful planning has gone up in flames. This is not uncommon. You must be flexible as cancellations and new appointments can occur on the fly. My advice breathe, be transparent, and take it in stride. As I stated in the previous article I've both had short notice cancellations and unplanned visits that yielded surprising benefits. Yet, this article isn't about picking yourself up off the floor, but instead how to conduct an interview, capture good interview data, and then debrief with the team. Up to this point a lot of things have gone well including the following:

1. Produced a series of testable ideas,
2. Identified ideal users in your target audience, but compromised on your ideal to achieve something executable,

3. Set your agendas and schedules,
4. Confirmed, confirmed and reconfirmed,
5. Made your travel and lodging arrangements, and
6. You've arrived and you're ready for your interviews to start.

## The interview at a macro level

Interviewing target users can be tricky. I've personally had sessions that started off with a user saying, "I hate your company." It turned out the sales team ran us into the account unprepared, to take some lumps. [Nick](#) and I learned a lot from that interaction, but we shied away from sharing our company's direction. I actually remember carefully closing my laptop, sliding it into my bag, and attempting to blend into the furniture. While other times it will go better than expected. Example an interview of a telecommunications company in Vancouver had great chemistry resulting in a great interview that blew past the schedule by two hours, stretched into lunch, and then an impromptu dinner. While I've referenced two extreme examples more than likely the interview will be valuable and somehow between these two extremes. As usual let me provide a real world example.

The stage was downtown Houston, TX in the middle of a sultry 2016 summer. We were there to talk about sensing and data management with oil and gas companies. Our industry sage, [Doug Gibson](#), carefully led us to lobby of the oil company where we met our host. Our host settled us and went to fetch the remaining attendees. The user group were the folks from the seismic team comprised of data purchasers, project managers and geophysicists. The room was stiff with the target users seemingly having passed judgement. We started our pitch by discussing the industry's aging workforce problem prompting a quick response, "Well there is no aging workforce problem from where I sit." Mind you this is a well known issue in the industry with [problems already apparent in the Permian Basin](#) and who knows what the reality in the 2020s and 2030s will be. So, the players in the room, knowing this was an industry problem responded snidely signifying

judgment had indeed been rendered. Even with a stiff room valuable outcomes were communicated which challenged our assumptions. One of my assumptions for Permanent Reservoir Management (PRM) only cabled systems were applicable. These chaps refuted that point due to HSE (Health Safety and Environment) concerns related to laborers potentially tripping over cables in dangerous areas. At some point the discussion turned towards [Hitachi's sensing technologies](#) with Doug brilliantly explaining them. Doug's explanation style and existing relationships to people in the room dramatically warmed up the interview resulting in a great conclusion to the meeting. Fast forward a few hours and we had coffee with one of [Manju's](#) colleagues who worked at the same company. The intent was to get his perspective as someone who managed specific projects on a daily basis. This coffee-talk discussion actually refuted some points brought up in the earlier meeting. Whereas the people in the meeting said we had little opportunity to help the oil company better manage their data, the individual who worked with the data on a daily basis stated there was plenty of room for better data management tools.

If I summarize these interviews, it is that even when you have a negative start things can turn around. Additionally, not everything that your initial interview reveals is totally accurate; in short you'll need multiple perspectives from people within the same company for innovation to strike.

## **Interviewing with four ears**

If you're only focused on what users are asking for you are in a precarious position. That is because what is top of mind for many users is usually something that hasn't gone quite right. Perhaps a sales team oversold, maybe there is a hot support issue, or you're not the issue and someone or something else is. If these are in the foreground then somehow you'll need to steer the discussion back to your topic and tease out what the user is "saying" they want. To be clear what one or more users say they want is quite different from what they are asking for. As my colleague [Sean Moser](#)

used to tell me, “Michael you always get what you ask for and not what you want.” This point is totally congruent with the results of interviews if you’re not careful. As an interviewer your aim is to poke about with probing questions and then close your mouth. You should only open your mouth to get other interviewers to engage or move the conversation along. If you find you’re talking too much then you’re interviewing yourself, which isn’t right. Truthfully, facilitating a session with users requires experience and it is totally analog. Since I like to stand on the shoulders of giants I’ll not repeat what others have documented. Therefore, below you’ll find a couple of references to conducting effective interviews.

- [Design Thinking How do I Talk to Customers](#) — A bit more about how to develop a questionnaire or interview guide, but contained within are extractable approaches for moving along an interview when a user gets to yes/no responses to your questions.
- [13 simple journalist techniques for effective interviews](#) — This one is more to my liking, it is simple and to the point. Most things are applicable to interviewing users, but some aren’t because the focus of this article is travel journalism.

I do have some nuances, that I’ll be documenting here, which make the findings from the interviews sturdy and valuable over time.

## **Record it, no literally make an audio recording**

Earlier in my career I worked with great engineering leaders like [Masuishi-san](#) and [Rich Rogers](#), and that meant they were skeptical. The teams led by these gentlemen asked all of us working with them a defining question: “Did a user really say that?” Essentially, our engineering teams were trying to understand if they should trust that our requests were grounded in reality. So, to answer that question we went on the road with our engineers to see customers, but with a puzzle. Our puzzle: Many of our engineers and architects had English as a second language. This meant language speed,

accents, expressions, and idioms were universally problems for our colleagues. Our solve for this puzzle was to record the sessions and transcribe the recordings. Several things resulted from this process, engineers began to trust we knew what we were talking about, they could review the recordings understanding at their own pace, and interestingly it allowed us to answer Masuishi-san's and Rich's question using the "voice of the customer." This truthfully was the instigation point for my beginning to record user interviews. Therefore, if possible ask and get explicit permission to record the session as you'll result in having the voice of the customer in your pocket. While you can find a recording approach that best meets your needs I'm a fan of a mobile recording application called HT Recorder — alas this app is no longer available. I like this recording app because it has the ability to produce a bookmarks file, which enables a new style of note taking, but since it is no longer available you'll need to find one that provides bookmarks or similar capabilities as described below. (Note in a future article update I will relate an updated process for note taking given how the technology has changed and some field time evaluating apps. Through some quick research one iOS app that caught my eye is [Voice Record Pro](#).)

## **Notes are for the important stuff only, obvious right?**

The natural tendency for interview note taking is to try and capture everything the interviewee says. While there are people who have the super power to convert the spoken word into perfect text, most people can't. So, assuming that you've been able to get permission to record the interview don't even try to take perfect notes. Essentially, your notes should capture what's important in the conversation, and if you're using HT Recorder, or similar, you'll be able to correlate audio timestamps to these important points. The experience is even richer with an iPad Pro, an Apple Pencil and [Goodnotes](#). With this setup you can get the speed of hand written notes, and the benefit of it being digital — due to GoodNotes OCR function. An



example benefit of this setup for note taking: The author can quickly turn around notes of importance that can be searched and transformed into a semi-finished report. My first experience with this approach was that same 2016 sultry week in Houston. This quick turn around afforded our Japanese leadership awareness of our target audience as they woke up. (Note as I gain new experiences with new recording, transcription and other technologies I'll update this section. However the premise still remains: with audio recordings and transcriptions notes should focus on the important stuff. For example GoodNotes has a audio recording feature that I hope to try.)

## **D&D stands for Debrief and Dinner not Dungeons...**

"Michael-san, I didn't catch what he said?" was a very common question that arose from [Beni](#) and Toru while we were on tour during a meal or in transit. I believe that "D&D" opportunities generated the sparks of innovation ultimately producing financial success. Another way of saying this is, lots of work happens in the interviews, after the interview, through transcriptions, etc., but none of this work is possible without D&D. They became the backbone of mutual understanding for what users said they needed versus what was asked. Maybe the most important part of D&D were the bonds formed between sales, engineering, architecture, product management, and research. Conversely, I've found that without D&D essential team bonds take longer to create and can ultimately lead to delayed work. In later years when we used D&D we found that these sessions also educated sales personnel ultimately shortening sales cycles, helping in new pursuits and importantly cementing relations with sales teams.

## **Conclusion**

Getting to the root of what a user in your target audience requires is essential to discover what needs to be built. What I've communicated is a

process to carefully interview users and capture results in a structured manner. This structure, as we will see later, enables a stronger design that is defensible to your peers and superiors in the organization. Additionally, it creates collateral that ages well and becomes better as it accumulates over the course of time. While many of these processes seem obvious, I can tell you from talking to people at many companies this is still novel. True story, as I was hunting for a job I described this process to an interviewer, and he was dumbfounded that he didn't think about recording interviews with customers. Another true story, several years ago when we described our innovation process to major industry analysts the response was to ask to see our raw data because this wasn't what they did. So while these things seem obvious I can tell you that in truth they aren't used as widely as you expect in the practice of business. So, if you follow along here you can make a defensible difference in your efforts, and bring people along on your journey.