2.2: Surveys & Interviews

#### **Introduction**

Welcome back! Ready to dig deeper into the world of UX design? Now that you’ve been given a rough review of and introduction to some of the research methods useful to UX designers, it’s time to take another in-depth look at two of the most common research methods we saw in UX Fundamentals: user interviews and user surveys. Rather than spread yourself thin trying to master every user research method out there, focus instead on the most common methods and develop an in-depth knowledge of their methodologies and practices. This will make you a great addition to any UX team in the corporate world. Keep this in mind as you read through the Exercise and complete the Task—what you’re learning now will prove essential in your future career!

You had a chance to do your first user interviews in UX Fundamentals. Now that you know a little more about what to expect, let’s try it a second time with more depth. We’ll begin this Exercise by reviewing how to get yourself prepared. We’ll then look into what types of questions you should be asking, as well as how to ask them effectively. We’ll finish up by looking into the methodologies surrounding interviews and surveys. Finally, you’ll have a chance to conduct and execute your own UX interviews! Ready to get started?

#### **Preparing for Interviews and Surveys**

Your first couple of steps into the world of user research can be intimidating, but with a little preparation, you can ensure you’re in the best position to be successful. You’ll find that your prep work is similar whether you’re conducting interviews or surveys. Think about ways the following steps can be useful no matter the method you choose, as well as ways they could specifically benefit you in the interviews you’ll conduct at the end of this Exercise.

##### **Identifying Your Research Goals**



Every one of us has done some sort of research prior to leaving for a trip, from planning out the best method of travel to and from the airport to seeking out the best restaurants recommended by locals. When we conduct this type of research, we often have very specific **research goals** in mind (e.g., transportation, accommodation, and food). These goals are what help us focus in on and narrow down options most relevant to our needs. Setting up research goals before talking to potential users is no different.

What do you need to know about your users? What kind of general attitudes or user opinions could positively shape the design of your project? Focus on the user insights that could benefit your project the most. Remember the problem statement you defined earlier in the course? What goals might help you discover solutions to your defined statement?

Let’s go over some common research goals to consider when conducting user interviews:

* Identifying users’ general attitudes about a problem or concept; for example, their needs in web-based email clients (how important is privacy and security to your user?).
* Documenting user opinions on competing sites or apps that inform the design of your project.
* Discerning the types of tasks users perform and in what contexts (i.e., task frequency, task difficulty, task duration, etc.); for example, how many tasks users complete during an average day.
* Determining which apps or sites your users enjoy using, as well as what types of apps or sites leave them frustrated.
* Collecting data points as evidence to demonstrate to key stakeholders that initial design thoughts will be effective/necessitating a change of course before design processes are too far underway.

##### **Choosing Your Participants**

Once you’ve established your research goals, it’s time to start thinking about the kinds of participants you’ll need to help address those goals. For user surveys, choosing participants is normally a straightforward task. Remember the demo project—the local travel guide app? Let’s use it as an example. What types of users would benefit from such an app? As travel is a fairly universal undertaking, it would be smart to pull from a variety of age groups and user backgrounds to ensure a well-rounded user population.

In more specific cases, however, this may change. If you’re designing a budgeting website, for instance, you may only want to survey accountants. An app for retirees? You may only want to survey people over the age of 65. Perhaps your target user has a number of different characteristics (student, male, single, interested in pop culture, etc.). In this case, develop a set of recruiting criteria you’ll be able to refer to once you begin looking for participants.

With user interviews, it can be a bit more challenging—the bigger the scope of your project, the more complex and nuanced its usability testing will be, and, after all, it’s not likely you’ll have the time and budget for more than a handful of interviews. In this case, it makes sense to spend more time identifying the ideal traits of your participants because this will ensure you’re only interviewing those with information pertinent to your project and will enable you to design and phrase your questions more effectively. It's entirely possible to dramatically improve your designs by speaking to just a few people, but how many is a “few?” While there's no magic number, it’s widely accepted that you can catch approximately 80% of errors by testing only five participants. Take a few moments to refresh your memory on the laws of diminishing returns in Jakob Nielsen’s “[Why You Only Need to Test with 5 Users](https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/).”

Let’s consider our travel guide app again and assume we’re only able to interview five users. You’d want to make sure your five users have all used travel apps in the past and are familiar with how they work. You could even limit your research to users who’ve used travel apps within the past few months. With so few participants, a designer needs to make sure they get useful information from every interview.

Below is a list of important traits to consider when preparing user surveys or interviews. You can apply these to your own project, as well.

* Prior knowledge of apps or websites similar to the product you’re designing
* Frequency of use of related apps or websites
* Social media habits (e.g., Facebook, Instagram, LinkedIn, etc.)
* Where they get their product news or news in general
* How often they use mobile devices vs. their home computers

##### **Creating Your Script**



Now that you know what you want to learn and who you want to learn it from, it’s time to formulate some questions. For both user interviews and user surveys, a script is a crucial step in preparing for your research. For each research method, the questions you ask and how you ask them will be slightly different, so we’ll cover them separately.

Since user surveys are conducted with a greater pool of participants and are normally taken remotely, they have their own set of unique guidelines:

* Closed questions are best. Multiple choice or true/false questions allow participants to answer quickly and move on, and they also expedite the tallying of totals once the study is over.
* A few open-ended questions are okay. They allow researchers to learn more about the thoughts and attitudes of their participants. Just remember that you’re the one who has to go through all that data afterwards! Keep it limited to only a few important topics and set a character count for responses.
* Timing and length matter. As you won’t be sitting with your participants, it’s important to design a survey that can be completed quickly and easily. Aim for fewer than 20 multiple-choice questions, otherwise you risk loss of focus and inaccurate answers.
* Your research goals should always be your focus. Every question should aim at shedding light on your research goals.

As you remember from UX Fundamentals, user interviews are conducted face-to-face and in real time, so you’ll want to follow a slightly different set of guidelines when writing your questions:

* Open-ended questions are best. Your goal should be to start an engaging conversation with your participant.
* Proper timing is essential. The longer the interview, the more a participant will lose focus, so try to keep everything under an hour. Open-ended questions will naturally lead to longer responses, so don’t feel like you need at least twenty questions. Eight to twelve conversation-starting topics is usually enough to get the ball rolling, and you can follow up with more specific questions as the need arises.
* Don’t forget your research goals! Every one of your questions should aim at eliciting information tied directly to your defined goals.

#### **User Surveys Methodology**

With a solid set of survey questions under your belt and a good idea of the audience you want to target, you’re ready to release your survey into the wild—but wait! How should you distribute your survey? What’s the best way of recruiting participants? No matter how pristine and polished your questions may be, they won’t do you any good sitting on your hard drive. Let’s go over some tips and tricks to help you get started collecting real data from real people.

##### **Preparing and Uploading Your Script**

It’s always a good idea to test your questions on a few colleagues or friends for an estimate of how long your survey will take to complete. You can also use this opportunity to check for confusing or misleading wording in your questions. This preemptive check decreases the chance for confusion from your actual participants.

Now it’s time to decide where you’ll host your survey. We mentioned a few different options in the previous Exercise—SurveyMonkey, SurveyGizmo, Google Forms, etc.—and any one of them would be a fine choice. You might try perusing their sites or reading user reviews if you’re having trouble deciding which to choose. Once you’ve worked with a few of them, you’ll have a better feel on which ones work best for your particular needs.

Finally, it’s time to build your survey online! While each different site is slightly different in how it lets you construct your survey, they’re all fairly straightforward. As you upload your questions, be sure they’re free from typos, grammatical errors, and so on, as these can be very distracting for participants.

##### **Activating and Promoting Your Survey**



Now that your survey is built and meets your (hopefully high) standards, it’s time for dissemination. Remember that your survey should only stay active for a limited period of time. There are a number of factors in determining how long you should keep your survey active:

* **How many survey responses are you hoping to obtain?** How many do you need to ensure the data is useful? Most surveys only require around 20 participants to be effective, but more is always better. The more participants, the lower your margin of error—in other words, the more accurately your results will reflect the thoughts and opinions of your target users as a whole. It may be worth keeping your survey active a bit longer to obtain additional data.
* **What strategies do you have for attracting participants to your survey?** If you already have a large group of possible participants available via email or social media, it may only take a few days to obtain the data you need. Consider what resources you have to attract participants (peer networks, giveaways, free consultations, etc.) and plan your timing accordingly.
* **Watch your data as it comes in and note any issues or incomplete responses.** If issues arise frequently, there may be a problem with the survey, and it might make sense to pull it offline, fix it up, then try again.

##### **Wrapping Up**

Once you’re confident with the responses you’ve received, take the survey offline and start analyzing the data. Conveniently, the next Exercise in this Achievement will cover that very topic!

#### **User Interviews Methodology**

While similar to surveys in some ways, interviews still require a different mindset in your approach. Let’s take a look at how the methodology for interviews differs from that of surveys. The interview itself is as simple as running through your script and enjoying a conversation with your participant, but there’s more to think about going on behind the scenes. Here are some basic steps to think about when planning, conducting, and reviewing your interviews:

##### **Scheduling and Logistics**

Where and when should your interview take place? Participants often have busy schedules, and UX designers are no different. Agree on a time and place or consider conducting your interview online through Skype, Zoom, Google Hangouts, or another popular video-conferencing app. Online and phone interviews don’t require travel time, tend to be simpler to schedule, and can be easily recorded for later review.

If you plan to schedule more than one interview in a day, make sure to give yourself at least 30 minutes between interviews to reflect, take a breather, and gather yourself for the next conversation. Interviewing can be mentally draining, so take care of yourself!

TIP!  
If you have a co-interviewer, you might consider a debrief at the end of the day. It can help you sort out the findings and observations you've made during your interviews and ensures you’re both on the same page. A debrief at the end of the day is more effective than backtracking days later when you may have forgotten key details from the interviews. If you’re conducting interviews on your own, you can still debrief! Try using our Slack channel or the communications sidebar in the platform.

##### **Having a Conversation**



The fun begins as soon as you sit down with your participant. Try to relax and enjoy yourself—participants will respond more openly in an informal, laid-back atmosphere. Introduce yourself, let the participant know why you’re conducting your interview, and keep the conversation fun, interesting, and educational. Let’s go over a few tips to get you started:

* In addition to explaining the goal of the interview, **tell your participants how you’ll be using their answers**. Answer any questions they may have and do your best to create a relaxed atmosphere.
* **Use your script as a guideline**. There’s no need to adhere to every single question you wrote down. Oftentimes, a conversation will veer off in new, interesting directions, and you should feel free to explore anything that will allow you to reach your research objectives.
* **Stick with open-ended questions and avoid asking leading questions**—those that elicit a desired response from your participant. For example, instead of asking “Would you prefer a travel app that offers insider information and is very easy to use?” ask “What features would be most relevant to you when searching for unique information about a travel destination?” This is more likely to facilitate a conversation and allow you to explore the participant’s feelings and opinions.
* While serendipitous conversations are great for learning new information about your users, sometimes they go off on tangents that don’t relate to your research goals. In these cases, it’s up to you to **steer the conversation back on track**. This is where your script will come in handy.
* **Be present.** Taking notes is a good idea, but paying more attention to your notes than your participant can come off as rude. Avoid this, if possible, or better yet:
* **Record your interview!** Recording an interview makes it easier to analyze the results at a later time. Before hitting the record button, however, be sure to inform your interviewee and ask for consent.
* **Ask for assistance.** Many designers find it easiest to have a colleague record or take notes. If this is a possibility, make sure to take advantage of the help!

##### **Wrapping Up**

Once you’ve worked your way through your script (or when you’re close to reaching an hour), start wrapping up by thanking your participant and asking if they have any questions for you. Patiently answer anything they may want to know, then conclude the call or meeting. Congratulations! You’ve just completed your first interview!

#### **Summary**

In this Exercise, we discussed how to prepare for two methods of user research: user interviews and user surveys. You learned how to define your research objectives, prepare your questions, and choose the right participants. We also took a look at detailed methodologies for both methods to give you the confidence to collect the information you need.

As you might have guessed, it’s now time to conduct your own interviews! In the upcoming Task, you’ll be planning, preparing for, and conducting a series of user interviews to collect data for your course project. But before that, take a look at the video below, where Claire, your video instructor, will be going over how to create scripts for surveys and interviews:



#### **Resources**

* [Complete Beginner's Guide to User Research](http://www.uxbooth.com/articles/complete-beginners-guide-to-design-research/)
* [Interviewing Users](https://www.nngroup.com/articles/interviewing-users/)
* [User Interviews — The Beginner's Guide](http://theuxreview.co.uk/user-interviews-the-beginners-guide/)

Take the quiz to test your knowledge on this Exercise.

Take Quiz

#### **Task**

* [DIRECTIONS](https://careerfoundry.com/en/course/become-a-ux-designer/exercise/surveys-and-interviews#directions)
* [SUBMISSION HISTORY](https://careerfoundry.com/en/course/become-a-ux-designer/exercise/surveys-and-interviews#step_submission_history)

 Estimated Task Time: 8 Hours.

For this Task, you’ll be identifying 3–5 interview participants, scheduling interviews, creating a script, and conducting and recording your interviews. As a bonus (optional) task, we recommend running a survey prior to conducting your interviews as you'll not only acquire first-hand experience in writing and conducting a survey but also gain initial insights from your users, which you can then explore in more depth during your interviews. Check out the Bonus Task below for further guidance. Whether you choose to do both the survey and interviews or simply interviews alone, remember to use the guidelines above and, most importantly, have fun and educational interactions with your participants!

While the process of performing the Task is estimated to take 4–6 hours, it’s vital that you allot extra time (i.e., 2–3 days) for coordinating with your participants. Lastly, if you’d like to conduct a survey as well as interviews, be sure to check out the Bonus Task first.

**Directions**

1. Define 2–3 research goals based on your project and what you hope to learn from your participants. If you decided to conduct a survey, consider whether you need to revise your research goals based on your survey findings.
2. Identify at least 3 friends, family, or coworkers that match your users’ characteristics and schedule in-person or online interviews with those individuals.
3. Using the guidelines from this Exercise, create your script and conduct the interviews. Record the interviews if possible or take notes to capture your results. If you have a friend or colleague who can help you, feel free to accept their assistance!
4. Save your script as a PDF file and upload it here. We’ll analyze the results in the next Exercise, but include an overall summary of how the interviews went and a high-levelbullet list of what you learned in this Exercise. There's no need to go into a lot of detail just yet. Feel free to share additional thoughts or ask questions in the submission box.

TIP!  
Share your questions with your peers and Tutor before conducting the interviews. Be sure to apply adjustments to your script according to relevant feedback.

**Bonus Task**

1. Define 2–3 research goals based on your project and what you hope to learn from your survey.
2. Decide which survey service you’d like to use (check back to Exercise 2.1 for some suggestions) and spend a little time familiarizing yourself with how to create a survey using your chosen service.
3. Identify ways in which you can share your survey that will provide you with findings relevant to your target audience—for example, using Facebook, Twitter, or Slack. Decide on a timeframe you’d like your survey to run for, and while your survey's running, begin recruiting and scheduling interviews with your participants!
4. Using the guidelines from this Exercise, create your survey script and launch and share your survey.
5. Once your survey is completed, analyze your findings to identify key insights. As you’ll need to jump quickly from survey to interviews, focus on identifying your top 3–4 insights from your survey findings and explain how you’ll use these insights to inform your research goals and script for your interviews.

I am conducting research on modern yoga users (primarily Prenatal and postnatal yoga) for my UX design course project.  If you in some capacity practice yoga, I would appreciate your taking the time to complete the following questionnaire.

Thank you for your time and help.

Set of questions for the survey:

1.   Do you think that “Yoga” is beneficial for women’s health?

o   Yes

o   No

2. Approximately, How many time you practice the yoga?

o   Everyday

o   2 to 3 days a week

o   4 to 5 days a week

o   I don’t do yoga

3.       Have you heard the term “Prenatal yoga” and Post natal yoga?

o   Yes

o   No

4.       Do you use a mobile app/ website to learn yoga and practice it at home?

o   Yes

o   No

5.       Which mobile app/website do you use to practice yoga?

6.       Which features are best in your currently using yoga app and which feature should be better?

7.       Do you like to write a review or feedback for the service you had taken?

o   Yes

o   No

8**.       Which plan do you prefer for payment of service?**

**o   Pay as per Hours**

**o   Like to buy the best deals**

**o   Subscriptions for month**

**o   Others**

This is a list of questions prepared for User interviews

1.      How do you use app/ a website that help you to do yoga?

2.      What are your favourite features of currently using a yoga app that you use for your practising? Why?

3.      Which is your favourite mobile app and how often you use it? Why?

4.      How do you establish the trust on qualified Yoga expert (Experience, Rating and reviews, Payment)

5.      How do you like to schedule an appointment and which method you prefer for booking an appointment?

6.      What will be the fair way for payments and which one you most prefer?

7.      Do you like to write reviews and feedback on the service that you had taken?

8.      What is your opinion about Prenatal yoga?