



WORKSHOP

Build Engaging Solutions Across **Power Platform**
Using Human-Centered Design Principles

Customer Interviews



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// The most exciting thing about AI is not the technology itself, but what we can do with it when we apply it to real-world problems and help people. //

- Satya Nadella

Rules of Engagement



Why do interviews?

User interviews can tell you a lot about the projects you're working with and the problem you're trying to solve. Interviewees can be stakeholders, potential users, or people who live or work in the environment you're investigating. Even a small sample of interviews can generate a wealth of data.

User interviews need to be an ongoing process, as their needs are constantly changing with their environment.

Pre-interview

Preparation

Selection Criteria

- Who do you want to talk to?
- Why these people and not others?
- When do you want to talk to them?
- Where will you find them?
- What incentives can you provide?

Preparation & Logistics

(in person)

- Find a neutral venue - go where the users are
- Visit the interview location beforehand (have a plan B)
- Collect all materials (consent forms, schedule, gift cards, forms, copies of surveys etc)
- Write the interview script / questionnaire
- Practice with someone on your team
- Charge your batteries!

Preparation & Logistics

(remote)

- Set up your video conferencing platform of choice, test device settings
- Stable internet service (and have a backup wifi access point)
- Prepare the questions, but be prepared to go off the script
- Permission to record, explain how the data will be used
- Write down key insights soon after

Preparation & Logistics

(data handling)

Collecting data:

- Build trust with interviewee (e.g. option to opt-out, pause recording, etc.)
- If recording, ask interviewees to refrain from sharing personal information

After data collection

- Use fake names
- Store data in a secure location
- Discard any personal data gathered as soon as possible (within 28 days)

Writing a recruiting screener - part I

Who do you want to talk to? Why?	What exact criteria will identify the people you want to talk to?	What screening questions will you ask? (Questions shouldn't reveal "right" answers)
People who live in [insert your City]	Have been a resident for at least > 1 year	How long have you been a resident?
Renters and Owners	2 renters, 2 owners	Do you own or rent (optional)
Age, from 18 to 60+	Quota: 1 x 22-35; 1 x 35-50	Age (optional)
Mix of men and women, gender inclusive	2 men, 2 women	Your gender identity (optional)

Writing a recruiting screener - part II

Who do you want to exclude? Why?	What exact criteria will identify the people you want to exclude?	What screening questions will you ask? (Questions shouldn't reveal "right" answers)
Travelers [If relevant]	Have been a resident of [Your City] for < 1 year	How long have you been a resident?
Minors	< 18 years old	How old are you?
People who work in tech	Current occupation	If you're currently working, which industry is the company you're working for in?

Observations & Note Taking

You are there to **listen**.

If possible, have two people. One interviewer and one note taker (or record).

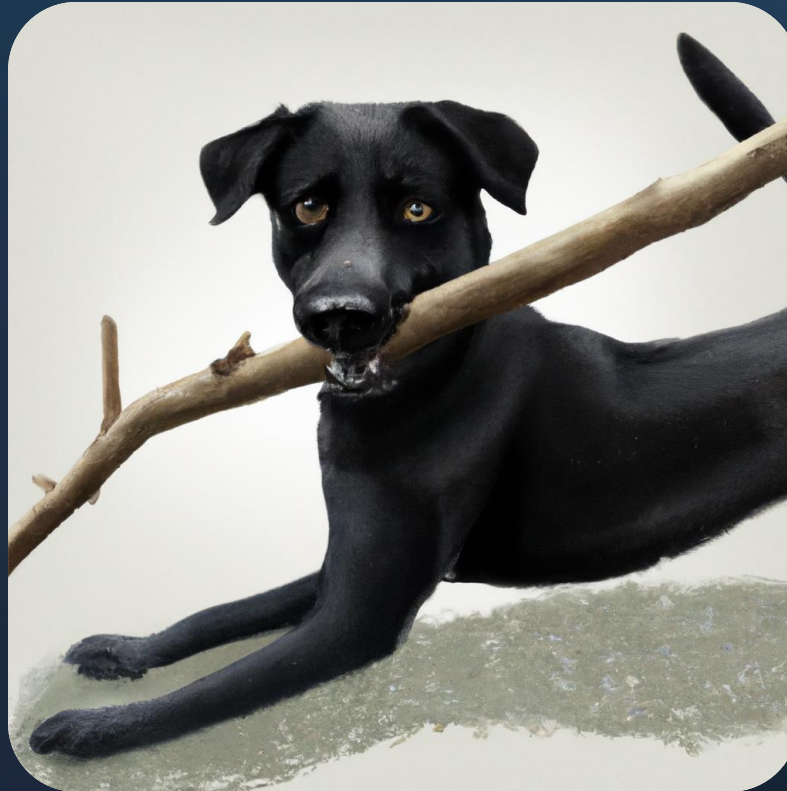
As an interviewer, remember to keep questions **open-ended** so you don't unintentionally lead your interviewee to any specific answer.

As an observer, remember to look at the interviewee's behavior, tone, body language, etc. as this is one of the key benefits of one-on-one interviews. Take as many notes as you can, and if typing in person, type continuously so as to not distract the user (white noise effect). If remote, mute the microphone.

Attention is a limited resource

We can't evaluate every possible detail about our thoughts.

This is why we have cognitive biases that can distort thinking, judgments, and beliefs.



Cognitive Biases

Common biases	What it is	Why we should care
Anchoring bias	Tendency to be influenced by the first piece of info we hear	Our goal is to look at needs and pain points across many people, not just one person
Confirmation bias	Tendency to selectively interpret info that confirms our beliefs, or asking questions that confirm what we believe to be true	Reassurances are nice, but it's not needed or appropriate for research
Exposure effect	Being exposed to the same idea multiple times makes us more likely to accept it as a fact	We at Power Platform believe our products are amazing or are invested in what we're building

Interview Notetaking

Interview Highlights

Use this template to take notes immediately after interviewing, while it's still fresh in your mind.

Date / Time / Location	Participant	Role	Industry

Observations

Describe the participant and the environment. What clues do these give us about the goals and priorities of the participant and/or the organization?

Key themes

List 2-3 main ideas or learnings that stood out from this observation.

Similarities (min 3 interviews)

List the ways in which this participant is similar to the other participants.

Differences (min 3 interviews)

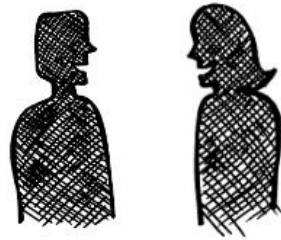
List the ways in which this participant is different from other participants.

Interview Practice

EXERCISE

Interview Someone

You best learn by doing!



Split into pairs



First person interviews second person for **5 minutes**.



Switch Roles



Be nice.

PROMPT

Mentoring Service



You are part of an initiative that will create a whole new experience of mentoring youths online.



Take a minute to think about some ideas and questions to ask.

Mentoring Service

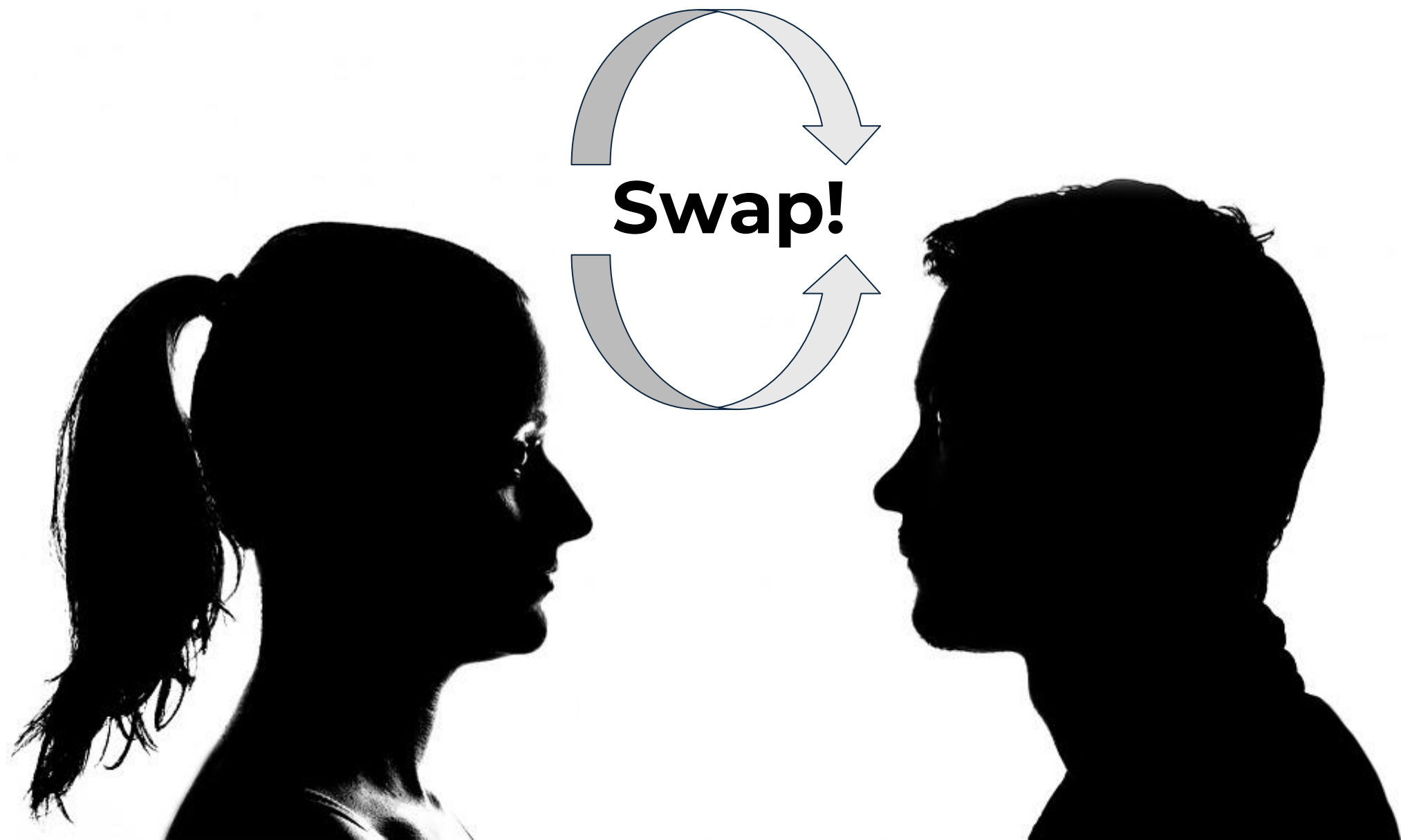


- ▼ Your goal is to understand the dynamics of mentoring in order to create an online portal that improves mentoring experience for youths.



Ask:

“When were you last approached by someone to be their mentor, and why did you agree?”



Mentoring Service



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Ask:

“When were you last approached by someone to be their mentor, and why did you agree?”

How was that?



Some guidelines
on what **NOT**
to do...





You ask yes or no questions



You should:

Ask open ended questions.



Bad: Do you love dogs?

Worse: Don't you love dogs?

Good: How do you feel about dogs?



You lead the
participant



You should:

Let the participant lead



Bad: Aren't dogs the best?

Good: about dogs?



You make the
participant
imagine



You should:

Give the participant something to
react to.



Bad: How would you feel about a
service that blah blah?

Good: Take a look at this
picture/service outline and tell me
what you think!



You talk to the
wrong people



You should:

Recruit and screen participants to make sure you're talking to people who will give relevant insights for your research.



Tip:

If you are building the service, you are not your user.



You don't
follow up



You should:

Understand why your participant does what she does or feels the way she does, by asking follow up questions.



Participant: I think ABC is great!

You: What's cool about ABC?

Participant: [valuable insight]



You talk too
much



You should:

Listen

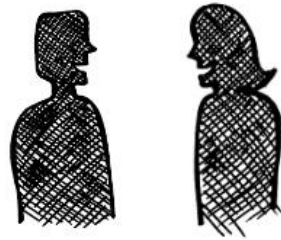


The sole purpose of user research
is for you to learn, not convince.

EXERCISE

Let's try it again

You best learn by doing!



Split into pairs



Second person interviews first person for **5 minutes**.



Switch Roles



Be nice.

PROMPT #2

Business improvements with AI



You are offering a new service that uses AI to improve a business process



Take a minute to think about some ideas and questions to ask.

Business improvements with AI



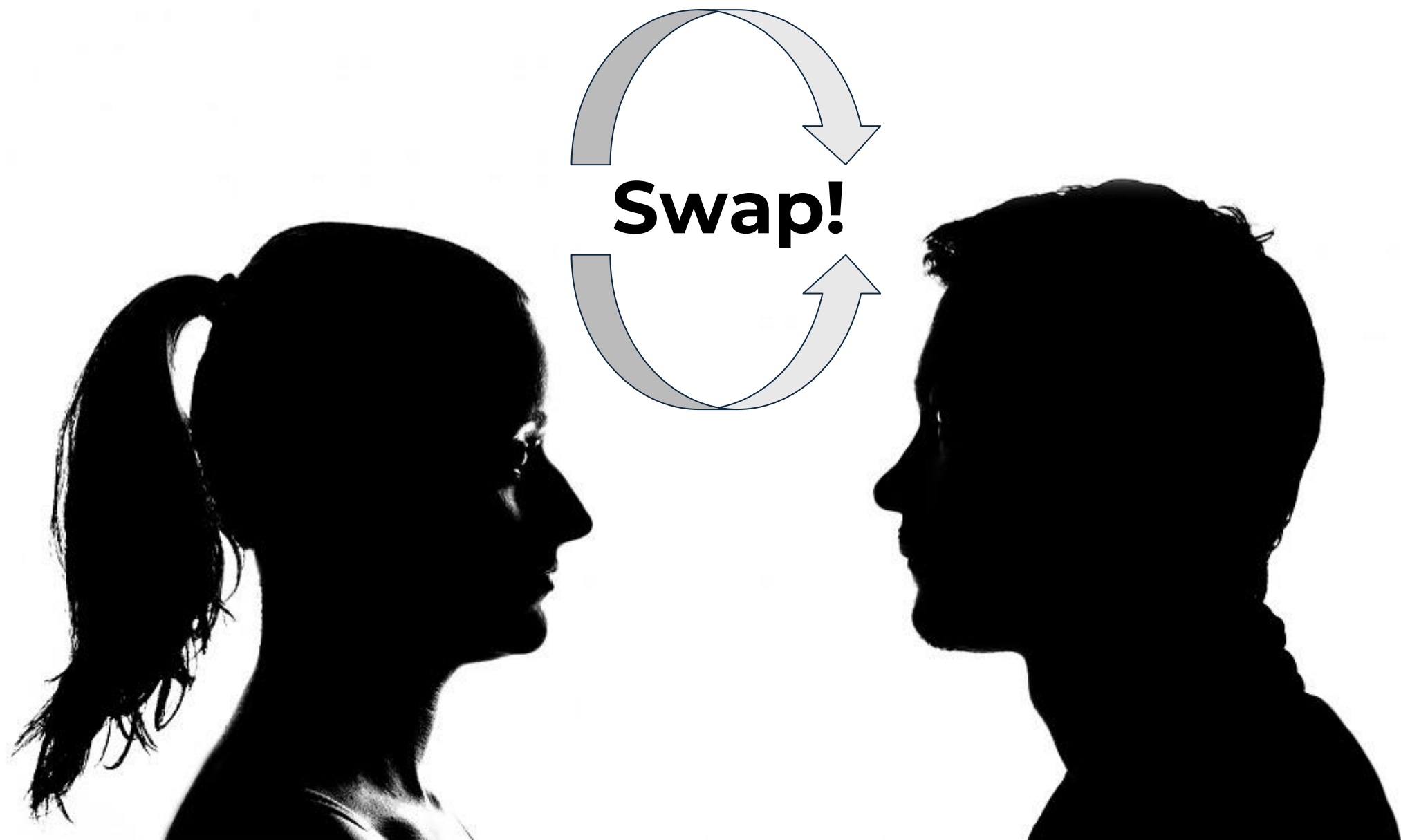
Your goal for this interview is to understand the reasons why someone might be reluctant to use AI in their work.

Ask:

“What are some concerns you might have if this service were to be implemented”



“Who makes decisions on whether or not a new service gets implemented?”



Business improvements with AI



Your goal for this interview is to understand the reasons why someone might be reluctant to use AI in their work.

Ask:

“What are some concerns you might have if this service were to be implemented”



“Who makes decisions on whether or not a new service gets implemented?”

How was that?



Post-interview

Analysis & Takeaways

Summary / Themes

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Observations

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Key themes

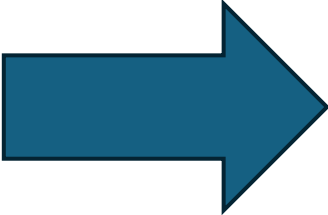
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Differences (min 3 interviews)

List the ways in which this participant is different from other participants.



Persona Groups

Project Name: Completed by: on: / /

	Group 1:	Group 2:	Group 3:
Give this group of users a name			
Why would they use our services? Write down the goals as users would express them. Don't simply write down the functions you expect them to use.			
What information do they want? In order to achieve their goals, what kind of information, functions or features do they need?			
How do they differ from the other groups? What makes this group a group? Think about usage patterns, job roles, tasks and activities.			

Human **Centered** Design to Human **Systems** Design

