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**Protocol:**

**Overarching Question:**  
How can Client employees use software more efficiently?

**Introduction:**

Hi, this is (us). We’re master’s students at the School of Information here at University of Michigan. My name is X and I will be asking questions and conducting the interview, this is Y and he/she will be taking notes. We were told that your organization uses several different programs - Event Management Systems, Event Master, Conference Programmer, and Iris Registration. The issue we were informed of is that these programs are separated, but overlapping each other to some degrees, and has been looking around for either another software entirely that can encompass all of your needs, or multiple softwares that can have information shared between of them.

To break down this interview: it’s going to last about an hour and I would really appreciate if you could treat me as someone who is entirely unfamiliar with what you do. In class, we compared this to a new intern starting with you that is not familiar with your job or any specific activities within it. I am here to learn your process from you.

A couple things before you start. I did want to let you know that we will do our best to keep your responses confidential. If there’s anything that you feel should be anonymous, please let me know. Our interview is entirely voluntary on your part, so if you are feeling you ever want to stop, just let me know. Also, do you mind if I take an audio recording?

Do you have any questions for me before we start?

**Question Set 1: Employees who deal with the problems of clients.**

**Overarching Question**

What inconvenience does the problem of using several different systems bring to the employees who deal with the problems of clients?

**Warm Up**

* What is your specific role within Client?
* How do you like Client?
* Could you walk me through your last full work day?
* Could you tell me your happiest moment at work?
* How long do you usually work every day?

**Role Specific Interactions**

* Do you work directly with the software, in terms of data entry, or are you more in the role of reviewing and approving what other people do?
  + How does your work fit into the organization’s flowchart as a whole?
  + What is the hardest part of entering the data?
  + How do you review the data entries? Can you walk me through the last time you did it?
  + How does the usability of the software affect your communication with clients? Do you think this could be easier/do you think you are doing this in the most efficient way possible?
* Let's say I’m a new client asking to plan an event at the University, what would you contribute to making sure my event is executed smoothly?
* How do your coworkers feel about their interactions with the software?

**Software Specific**

* How do you feel about the software you use in your job?
  + Does using too many software systems affect your job efficiency?
  + (If they feel hard to use) What do you think that makes it hard?
  + (If they feel hard to use) How do you think this could be improved?
  + (If they feel easy to use) What features do you like about your current software?
  + Do you wish you had less programs to use?
  + Does using too many software systems make your clients feel inconvenient?
* How long have you used these softwares?
* Thinking about the most recent problem you met when you using the softwares, can you describe that to me?
* Tell us about a time when you got most frustrated with one or more of the programs you use.
* What makes you uncomfortable most at work with regards to the software you use?
* What is the best/worst part about the programs you use?
* Do you agree with Director when they say that they would like a more inclusive program?
  + What specific issues have you come across that lead you to believe that?

**Observation**

* At this point in the interview, we would like you to take us through what you do on the computer and explain as you work your way through the program.

**Conclusion:**

Thank you for taking this time out of your day for us, those are all of the questions we have for you. If you need to get in touch, feel free to email us at [teamcharge@umich.edu](mailto:teamcharge@umich.edu). In a few weeks we might reach out for some follow-up questions, but this is the only interview we’ll need from you. In 6-8 weeks, once we’ve finished our other interviews and finish analyzing everything we’ll send you and Client our final paper with our results. We may also do a presentation if it’s necessary, which you will be invited to. Once again, thank you for your time, and have a nice day!

**Question Set 2: Employees who are responsible for sales and marketing.**

**Overarching Question**

What inconvenience does the problem of using several different systems bring to the employees who are responsible for sales and marketing?

**Warm Up**

* Which tasks are you majorly involved in at Client?
* How do you like Client?
* Could you walk me through your last full work day?
* Could you tell me your happiest moment at work?
* How long do you usually work every day?

**Role Specific Interactions**

* Do you work directly with the software, in terms of data entry, or are you more in the role of reviewing and approving what other people do?
  + How does your work fit into the organization’s flowchart as a whole?
  + What is the hardest part of entering the data?
  + How do you review the data entries? Can you walk me through the last time you did it?
  + How does the usability of the software affect you as a sale? Do you think this could be easier/do you think you are doing this in the most efficient way possible?
* How do your coworkers feel about their interactions with the software?

**Software Specific**

* How do you feel about the software you use in your job?
  + If they are hard to use, what do you think that makes it hard?
    - How do you think that makes them hard to use?
  + Do you wish you had less programs to use?
  + What features do you like about your current software?
* How long have you used these softwares?
* Thinking about the most recent problem you met when you using the softwares, can you describe that to me?
* Tell us about a time when you got most frustrated with one or more of the programs you use.
* What makes you uncomfortable most at work with regards to the software you use?
* What is the best/worst part about the programs you use?
* Do you agree with Director when they say that they would like a more inclusive program?
  + What specific issues have you come across that lead you to believe that?

**Observation**

* At this point in the interview, we would like you to take us through what you do on the computer and explain as you work your way through the program.

**Conclusion**

Thank you for taking this time out of your day for us, those are all of the questions we have for you. If you need to get in touch, feel free to email us at [teamcharge@umich.edu](mailto:teamcharge@umich.edu). In a few weeks we might reach out for some follow-up questions, but this is the only interview we’ll need from you. In 6-8 weeks, once we’ve finished our other interviews and finish analyzing everything we’ll send you and Client our final paper with our results. We may also do a presentation if it’s necessary, which you will be invited to. Once again, thank you for your time, and have a nice day!

**Question Set 3: Employees who supervises the work of others.**

**Overarching Question**

What inconvenience does the problem of using several different systems bring to the supervisors?

**Warm Up**

* What is your specific role within Client?
* How do you like Client?
* Could you walk me through your last full work day?
* Could you tell me your happiest moment at work?
* How long do you usually work every day?

**Role Specific Interactions**

* Do you work directly with the software, in terms of data entry, or are you more in the role of reviewing and approving what other people do?
  + How does your work fit into the organization’s flowchart as a whole?
  + What is the hardest part of entering the data?
  + How do you review the data entries? Can you walk me through the last time you did it?
  + How does the usability of the software affect you as a supervisor? Do you think this could be easier/do you think you are doing this in the most efficient way possible?
* Have your subordinates expressed like or dislike regarding interactions with the software?

**Software Specific**

* How do you feel about the software you use in your job?
  + Does using too many systems affect your communicating with your co-workers or your work efficiency?
  + If they are hard to use, what do you think that makes it hard?
  + (If they feel hard to use) How do you think that makes them hard to use?
  + (If they feel hard to use) How do you think this could be improved?
  + (If they feel easy to use) What features do you like about your current software?
* How long have you used these softwares?
* Thinking about the most recent problem you met when you using the softwares, can you describe that to me?
* Tell us about a time when you got most frustrated with one or more of the programs you use.
* What makes you uncomfortable most at work with regards to the software you use?
* What is the best/worst part about the programs you use?
* Do you agree with Director when they say that they would like a more inclusive program?
  + What specific issues have you come across that lead you to believe that?
* Do you believe you and your subordinates would be open to a change in software? Or alternatively, a session on how to use the current program better?

**Observation**

* At this point in the interview, we would like you to take us through what you do in your computer program and explain as you work your way through the program.

**Conclusion**

Thank you for taking this time out of your day for us, those are all of the questions we have for you. If you need to get in touch, feel free to email us at [teamcharge@umich.edu](mailto:teamcharge@umich.edu). In a few weeks we might reach out for some follow-up questions, but this is the only interview we’ll need from you. In 6-8 weeks, once we’ve finished our other interviews and finish analyzing everything we’ll send you and Client our final paper with our results. We may also do a presentation if it’s necessary, which you will be invited to. Once again, thank you for your time, and have a nice day!