User Interviews: The Practical Guide

A hands-on workshop for conducting effective user research

About Me, Emily Ding

Product Designer & User Researcher

Education: Carnegie Mellon University — Cognitive Science, HCI, and Design

Experience: Highmark Health, Octave Bioscience, Space and Flow, GrowthCurve Capital, PureFacts

Passion: Understanding users deeply through research to uncover their real pain points and needs

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Talk to Humans to Explore a Problem

Not To:

- Validate your idea
- Get compliments
- Confirm what you already think

To:

Explore the problem space with people who actually experience it

My Research Approach

Fundamental principles that guide every successful user interview:

1	2	3	4
Open-Ended Questions	**Reflections**	**Always Ask Why**	**Build Intuition**
Let them talk.	Don't be shy to clarify what they said.	Dig deeper.	What are users struggling with? Why?

Before You Start: Define Your Research Question

Get clear on what you're exploring

What is your overarching research question?

Who are your target users? Other stakeholders in the ecosystem?

Real Example from Healthcare

Problem Space: Healthcare workers struggle with using Motivational Interviewing (MI, a counseling method)

Research Question: *"What helps healthcare workers become successful Motivational Interviewing professionals?"*

Target Users: minimally trained MI trainees (novices)

Other Stakeholders: MI Trainers (experts)

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Step 1: Create Your Interview Guide

Team Alignment

Define Problem

Document Hypotheses

Write Questions

This structured approach ensures your team starts aligned and your interviews stay focused on discovery.

Interview Guide Example

Hi [Client Name], thank you so much for taking the time to speak with us today. We really appreciate your insights and feedback on your experience with the Fee Manager product, also known as Quartal.

The goal of this conversation is to better understand how you're using the Fee Manager, what's working well, and where there's room for improvement. This isn't just about hearing what's great—it's just as valuable for us to learn about challenges or unmet needs you've encountered.

Your feedback will help us make informed decisions about future improvements, and of course, everything you share will be treated with care and confidentiality.

We'll spend about 45 minutes today. I also want this to feel like a discussion, so if anything comes to mind that feels important, feel free to share—even if I don't specifically ask about it.

Sound good? Great—let's dive in!

"To start, can you tell me a bit about your role and how the Fee Manager product fits into your work or process?"

Who you are

- "Tell me about your day-to-day interactions with the fee management solution. What role does it play in your workflows?"

Insights on purchase of Fee Manager (why did you buy, like/dislike)

- "How involved were you in the buying process or decision?"
- What key considerations drove the purchase decision
  - "What are some common questions you were asked by people making the purchase decision? How did they evaluate whether to buy? / What factors drove their decision to buy?"
- Top contenders other than FM
- Why did you choose FM?
- "When this solution was implemented, what specific challenges or goals did it aim to address? How well has it [met those goals]?"

Insights on Current Experiences

Real Use Cases / Scenarios

- What are the top 3 things you like about FM?

- "Can you walk me through a recent instance where you struggled or were frustrated with FM? What was the impact?"

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a. Is this a frequent issue?

b. Is this an urgent issue? (blocker/critical)

c. Are there other frequent or urgent issues with FM you run into?

Identify Areas of Friction / Opportunities

- "What's the most frustrating part of working with this solution? How does that affect your team's ability to perform?"

- "What parts of the current process would you be happy to let go of entirely— whether by automation or a service? What do you need to maintain ownership over but would love improved support with?"

Integration-Specific

- What's the most time-consuming or error-prone part of connecting FM to your systems?

- What aspects of your current system's integrations make it harder or easier to achieve your goals?

Closing

- "Is there anything about your current workflows, challenges, or successes that we haven't covered, but that plays a big role in how you evaluate fee management solutions?"

- "What makes your team or organization particularly effective—or constrained— when using this solution?"

- If you could wave a magic wand (where anything is possible) and change any part of this experience, what would you change and how?

"Thank you so much for your time and thoughtful feedback today, [Client Name]. Your insights are incredibly valuable and will help us continue improving our Fee Manager product to better meet your needs.

If anything else comes to mind after we wrap up, please don't hesitate to reach out—we'd love to hear it. Thanks again, and we really appreciate your partnership!

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Interview Cheat Sheet — What to Ask

01
Intent: Discover Real Use Cases

"Tell me about a time in the last 3 months when you did this."

"Tell me about the most recent time you experienced this."

02
Outcomes: Discover Bare Minimum vs. Actual

"What would be the bare minimum to consider it a success?"

"How did it turn out the last few times you did this?"

03
Journey: Discover Joy Points & Pain Points

"What went well last time?"

"What did you struggle with?"

"What was frustrating?"

04
Wrap-Up: Magic Wand Solutions

"If you could wave a magic wand and change any part of this experience, what would you change? And why?"

During the Interview: Two Essential Rules

Rule 1: Don't Fear Silence

Give people more space than usual to think.

You are **prompting and probing** — not pitching.

Rule 2: Don't Talk About Yourself

Brief intro for credibility: *"I'm a student working on improving X."*

That's it. This is about **them**, not you.

Notetaker + Recording Setup

Bring a second person whenever possible.

Why?

- AI captures everything, but **humans use judgment**
- They catch body language, tone, hesitations — things transcripts miss

For Zoom Interviews

- Ask permission for recording + notetaker
- Notetaker: camera/mic off (fly on the wall)
- They can ask a question at the end if something important was missed or needs deeper exploration

Right After the Interview — Work Lean

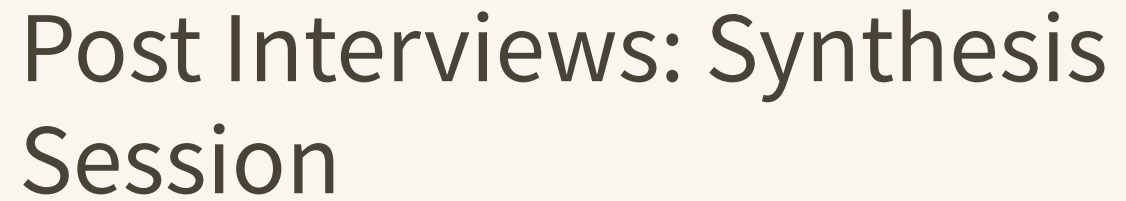### Synthesize Immediately!

Highlight top quotes & takeaways

Share Quick Notes

Share with your team (bullet points in the group chat)

Learn & Adapt Fast

Teammates can explore the same thing in their next interviews

Post Interviews: Synthesis Session

Sticky Notes	Organize by Themes
Use Miro, FigJam, or Dovetail	Think "vibes," not just keywords

Golden Insights	
Future product decisions stands on these!	

Why this matters: Alignment + Direction + Heuristics

Q&A

Open Floor:

1. How are you planning to find people to interview?

2. Who's already tried? What happened?

Your Turn

Create the Starting Interview Guide

- **Get together with your team**

- **Define:** Problem space, target users, main research question

- **Write out your assumptions** (look for overlapping categories)

- **Turn assumptions into open-ended questions** → this is your initial question bank!

- **Add later (if time):** Standardized intro + closing

Questions? Blockers? Let's solve them now.