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Writing an Effective Guide for a UX Interview

Summary: Preparing a guide for a user interview ensures that topics relevant to your research questions are covered, and that the interview captures in-depth information about people's lives and needs.

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Topics: Research Methods

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In the discovery phase of product development, user interviews are often used to capture important information about users: their backgrounds, beliefs, motivations, desires, or needs. Typically, the interviews carried out at this stage are semistructured (referred to as "depth interviews" by market researchers) — they generally have a predefined structure, but also allow the interviewer the flexibility to follow up on significant statements made by participants.

In a semistructured interview, the interviewer uses an interview guide (also referred to as a discussion guide). Unlike an interview script — which is used in

structured interviews — an interview guide can be used flexibly: interviewers can ask questions in any order they see fit, omit questions, or ask questions that are not in the guide.

A good interview guide paves the way for a deep, free-flowing conversation with participants. (Obviously, the way you conduct the interview will also be important, but that's another article!) Interview guides should include a few concise, open-ended questions to encourage participants to tell their stories. These will be followed by carefully crafted, probing questions to uncover motivations or beliefs behind certain reported behaviors or utterances.

Constructing a good interview guide can be tricky and time-consuming. It's not uncommon to spend a full day crafting one. However, it's important to have one to ensure you get the most out of your interviews. Without an interview guide you run the risk of:

- Asking leading questions as you try to think of questions on the spot
- Not covering topics relevant to your research questions in each interview

Ultimately, without an interview guide, you are in danger of compromising the validity of your data. Here are some steps meant to help you create an interview guide if you're new to this practice.

Step 1: Write Your Research Questions

Sometimes the research questions are clear and obvious. However, sometimes they're not. Maybe you've realized you need to speak to users because you don't know anything about them. Good! But what do you want to find out from them? These are your research questions. Write these out first before working

on your interview guide, as they will shape your interview questions. Below are some examples of research questions:

- What are users' expectations in this situation?
- How do users make a decision in this situation?
- How have users managed to solve this problem in the past?
- What aspects of this product do users care most about, and why?

Step 2: Brainstorm Interview Questions

Next, note down all interview questions that come to mind. It doesn't matter whether they are good or poor — you'll deal with that later. You can use mind maps, digital whiteboards, or a simple list — whatever works for you! Sometimes, further research questions pop up here. That's fine; add them to your list of research questions.

Step 3: Broaden Your Questions

It's typical after step 2 to have a long list of mostly closed questions. Those kinds of questions wouldn't make for a good interview because they won't allow for unanticipated stories and statements to emerge and can limit your ability to build rapport with the participant. (Rapport is important if you're looking to gather accurate, in-depth information from your participants.)

Review your list of questions and ask yourself, for each interview question, **is there a broader, more open-ended version of that question that you can ask instead?**

For example, consider the following closed questions that could be asked in an

interview with an employee.

- Do you work in an office?
- Is the work mostly desk-based or paper-based?
- Do you have to attend meetings during the workday?
- Do you work in a team?

The above questions could be answered by asking the participant to describe a typical day at work. It's likely that in doing so, the participant may cover all or many of the above. If the participant has not covered everything, then some of these can be asked as follow-up questions.

Example questions, that prompt the user to recall a certain event and are similar to those used in the critical-incident method, are excellent for gathering stories and unanticipated statements. For instance, imagine you're conducting an interview to learn about people's experiences cooking at home. The following example questions provide the opportunity for participants to tell many different stories and give you a glimpse into their lives.

- Tell me about the last time you cooked at home.
- Tell me about a time where you cooked something new.
- Tell me about a time when you cooked something that turned out well.
- Tell me about a time when you cooked something that didn't turn out as you hoped.
- Tell me about a time when you were thinking about cooking something but decided to get takeout instead?

Step 4: Fill In for Unaccounted Research

Questions

Align each interview question to your research questions. If you have research questions that are not addressed by any of your interview questions, fill in the gap by crafting some more interview questions. Repeat step 3 if needed.

The interview guide can include your research questions. Some researchers like to remind themselves of the aims of the research by displaying these either at the top of the guide or alongside the interview questions.

Step 5: Arrange Your Questions

To make the conversation flow in a logical order and seem natural **think about the best order for your questions**. For example, if you're talking about an experience people have had, it makes sense to move in a chronological order. If the experience has set phases (such as *discover*, *choose*, *purchase*, *use*, *review*) that you might have documented in a [user-journey map](#), [service blueprint](#), or experience map then you may want to align your questions to these phases. That's not to say you can't depart from this order in the interview if you need to!

You should also think about **preparing some warmup questions** that are open-ended and easy to answer to build rapport at the beginning of your interview. For example, "Tell me a little about yourself" is a typical opening question which gets the participant talking. Any questions that require reflection should be featured later in your guide; introducing them too early could be overwhelming and you might get stereotypical responses, as participants haven't had a chance to recall events, feelings, and form judgments.

Step 6: Prepare Additional Probing and Followup Questions

Once you've ordered your questions, go through each one and prepare **followup questions** meant to provide you with **additional detail and clarification**, such as "Where were you when this happened?", "When did that happen?", "Tell me why you did that?", and so on.

You can include **probing questions**, too, to help you to remember to ask them — for example, "Tell me more about that", "Tell me why you felt that way", "Why is that important to you?"

Step 7: Pilot Your Guide

Piloting your guide will give you an idea of:

- Questions you should ask but aren't yet included in your guide
- Questions that need rewording
- Whether the question order works
- Whether you will have time for all your questions

Recruit a pilot participant and give yourself enough time to make some changes. It's okay to make updates to your guide throughout your interviews, but the point of piloting your guide is to fix any glaring issues before commencing research.

Summary

A guide will provide focus to your interviews and ensure that they are

successful. Your interview guide should consist of broad, open-ended questions that allow participants to tell you about their experience in detail. These questions will be accompanied by many probing and followup questions, used to capture further details and gain clarification. You can **download an example of an interview guide** to refer to as you create your own interview guides.

Learn more: User Interviews, Advanced techniques to uncover values, motivations, and desires, a full-day course at the UX Conference.

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Example Interview Guide (PDF)

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