Tips and Guide to Interviewing

Originally created by Prof. Jaime Ruiz

• When done properly, interviewing (with observations) is one of the fastest ways to get up-to-speed with the constraints under which your system will need to function

• It provides you with lots of rich, detailed data about the reality of your users’ lives and how you can make their lives better
**DO**

- Learn to see the world through the person’s eyes
- Let them teach *you*
- Keep it concrete
- Use the terms and words they use
- Look at the person when talking to them, be attentive
- Enunciate
- Have good posture
- Respect personal space
- Dress professionally but not formally
- Act like you want to be there
- Ask when you don’t understand something
- Ask open-ended questions

**DON’T**

- Go through a checklist of questions
- Ask short-answer, closed questions
- Lead participants to a particular answer
- Ask questions that encourage generalizations, like, “So what’s a typical day like for you?”
- Ask them what you can do to make system easier to use
- Interrupt the person
- Interview the person away from where they work and away from the tools they use
- Correct the person or attempt to teach them
- Sneeze or cough without covering your mouth
- Take a lot of physical stuff
  - Notebook, consent forms
  - Recording device
  - *No more!*

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*Colorado State University*
Preparing for an Interview

• Before starting, ask yourself:
  – What do I want to learn by interviewing these people?

• Initially, you will have a vague idea
  – That is OK!

• After a few interviews, you will know precisely what you need to be learning
  – *The users will tell you* what is important and where you should focus

• Divorce yourself of preconceived notions of how they work and *let them tell you* how they work
Stages of Interviewing and Relationships - all in a single session

Interview Step
1. Explain project, gain consent
2. Start the “getting acquainted” interview (warm-up)
3. Move to “grand tour” interview
4. Move to contextual interview (work demos)
5. Wrap-up by summarizing and confirming what it is you heard

Relationship Progression
Interviewer-interviewee
Master-apprentice (M/A)
Partner: M/A but more equal power
1. Gaining Consent

- You need to get consent from anyone you interview or observe
- You need 2 consent forms for each person
  - You get a signed copy, and they keep a signed copy
- Have plenty of blank consent forms on hand!
- Verbally explain what it is you are doing (see next slide)
- Explain that you must gain permission to interview them and observe them as they work
  - You may need permission from them and their supervisor
- Hand them copy of the consent form, allow them to read it over
  - Keep busy with something else so they don’t feel pressured
  - But not email, SMS’ing, IM’ing...
  - Do study-related admin, look like you are prepping
- Answer any questions they may have
1. Explaining the Project

“We’re taking a class in human-computer interaction that teaches how to build computers that are easier-to-use. To learn to do this, we are doing a project where we will prototype new technology and software.”

“Before we can develop new prototypes, we first need to know how people actually work. So we will interview and observe people as they work, then develop new prototypes. When these prototypes are ready, we will ask people how the prototypes’ ease-of-use can be improved...”

“As part of this project, we would like to interview you and observe you as you work. Later, we’ll ask you to evaluate our prototypes to tell us how we can improve them to match the way you work.”

“Our class will run over the next three months, and depending on your schedule, we would like to meet with you a total of 3 or 4 times. Today, we’re interesting in interviewing you and observing your work process.”
Verbal Explanations

• In your verbal explanations, use language that a layman can understand
  – “Easy-to-use”
  – “User-friendly”
  – Computers, software (rather than systems, applications...)
• Indicate you are there to learn, both as a student and as an HCI practitioner
• They are not doing you any favors if they are “easy” on you
  – Make sure you phrase things to make this dynamic clear
  – Example: “We’d like to learn how to improve our design’s usability,” rather than, “What do you think of this design?”
2. Getting Acquainted

• Once you have consent, start recording (if you have permission/consent)
  – “I’m just going to turn this on now so I don’t forget”
  – Treat the act of recording as *routine*, then move on

• Quickly get into some “warm-up questions”
2. Warming Up

• Ask:
  – What their position is
  – How long they have been there
  – What their job entails

• *This should not be a checklist of items*
  – That sets the wrong tone

• Examples
  – “So I see you are a X. What does that mean, really?”
  – “How long have you been doing that?”
3. Moving to the Grand Tour

- Once you have a general overview of their role, you will move to the “grand tour”

- This is a transition from fairly narrow questions to very open-ended questions that enable the person to fully describe, from their perspective, how they get work done

- The grand tour question is also your most versatile question in any interviewing context...
4. Moving to the Contextual Interview

“Could you walk me through...”
4. Walkthroughs/Retrospectives

- Walkthrough-retrospective is a reconstruction of past events
- Walkthrough can also be as the person is performing a task
- Is concrete and grounded

- The more recent the retrospective event, the better
  - Is still fresh in mind

- Details naturally emerge
  - Avoids abstract generalities that the person has pre-filtered
  - As details emerge, you should continue to look for more details

- People can walk you through anything depending on your needs
  - “Walk me through your day today”
  - “Walk me through how you entered this form into the system”
4. Reconstruct vs. Remember

• Retrospectives *reconstruct* rather than simply remember

• When people reconstruct events, there is a natural ordering to those events
  – Cause-effect

• Helps ensure person recalls the many details necessary to get work done
  – “And then I... Oh, wait, that’s right, I had to do this first, before doing the next thing...”
4. Going Deeper

• As the person walks you through their work, they will drop details here and there about specific aspects of work

• These markers indicate what is important *to the person*
  – They help you avoid imposing your assumptions of how work is accomplished by them
  – People generally say things for a reason

• You use these markers to dive deeper, moving from the general to the specific
Tips and Things to Watch For

• Pay special attention to hesitations
  – Indicate situations in which user’s understanding of work is contradicted by their tools

• Note triggers which start a task
  – Regular (e.g. arrive at the office), opportunistic (e.g. no one around), on-demand (phone)

• People naturally augment and customize tools and space
  – How they think about and act is revealed in physical artifacts
  – Pay attention to how tools/space modified or how their use modified
  – Space can serve as memory store, as guide or hindrance to work
  – Look for signs of wear and tear that signal how important certain items are

• Look for flow of items within a workspace
  – Where does an artifact “travel” throughout its lifetime?
  – Who does it visit, for how long, and why?
  – Where does it start out and end?
Culture Tips

• Verbal and non-verbal language used
  – Language unique to the users’ culture
  – How people speak, interact with one another
  – How people present themselves (clothing, work space, ...)

• Recurring patterns of behavior
  – What do people repeatedly do/say?

• Attitudes
  – “Not my problem...” vs. “Let me see if I can help...”

• Formal, informal policies
  – Written regulations (e.g. company manual, posted signs)
  – Government requirements
  – Accepted conventions (e.g. printed slides posted in elevators to announce talks)
Be on the Lookout...

• What is the overall “tone” of the environment?
  – What is the attitude in the air?

• What policies, informal or formal, guide the work?
  – Will need to follow any policies in place

• Who has power over whom?
  – Don’t want to disrupt chains of power

• What values guide people’s work?
  – What is important, what is simply perfunctory?
4. Incorporating Artifacts

• In walkthroughs, people will often start to point or gesture at objects or spaces that helped them accomplish their task
• This is your opportunity to naturally bring these objects into the interview to start discussing how they are used
• Can then ask for a live demo to begin your observations of work
4. Artifacts and Environment

• People rely on environment and the things within it to help them remember what to do and how to do it
• Make sure you are in interviewing in their workspace
• Ask to see tools/software they reference
• When an artifact is present, they remember details they would otherwise gloss over
Ask!

• Ask questions when you don’t understand something
  – Don’t look it up online later
  – Get *their view* on whatever it is you don’t know or understand

• Ask for explanations of special terms
  – Terms you have never heard of
  – Words used in ways you haven’t heard used before

• Special terms are “insider” terms that clue you in to their particular culture of practice – DON’T ASSUME YOU KNOW WHAT THEY MEAN TO THE USER!

• Examples
  – “These records run ‘hot’”
  – “Let’s just put a slug there for now”
  – “This is a rough cut”
Interrupting

• If you need clarifications, jot down a note
  – Let the person finish their train of thought
  – I put question marks ? in margins for things I want to go back to

• At the next pause, you can return to the point
  – “Can you tell me again about...?”
  – “You mentioned something I wanted to follow up on...”
Guiding the Interview

• Avoid the abstract and generalizations

• Make person be specific
  – Ask them to give a recent example
  – Ask them to walk through a recent event

• Tip-offs for generalizations:
  – “Typically what I do is...”
  – “Well, what you do is...”

• To get back to specifics, you say:
  – “What’s a recent example of this happening? Can you walk me through this event?”
Acknowledging

• Your acknowledgements should indicate that you understand, not that you approve or disapprove
  – “Mmm...”
  – “Mmm-hmm...”

• Not:
  – “Yeah, totally”
  – “I’m with you there”
  – “No way!”

• You do not want to inadvertently lead a person down a path just because they feel you are judging what they say
Wrapping Up

• Summarize main things learned, get them to correct any mis-understandings

• *Thank them and smile as you thank them*
After the Interview

• Transcribe and annotate the interview!
• This will help you in at least two ways:
  1. You will have the interview in a format that is easier to refer to, search, and skim (for the interpretation session)
  2. You will gain new insights into what the person was telling you about during the interview