CHAPTER 7

Documenting the Interview

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On one level, documentation is how you capture the definitive, fully detailed record of the interview (the "data"). On another level, it's how you, as the interviewer, make the ah-has and other important take-aways stick. While doing this, you have to stay engaged with the participant. Beyond that, documentation also bleeds into the sense making and storytelling that follow fieldwork.

Taking Notes

Although you might be tempted to try, you simply can't catch everything by taking notes. Typical handwriting is about 30 words per minute, and a great typist can do 60 wpm. Audio books are at least 100 wpm (and likely closer to 150 wpm). But people speak less clearly—and more quickly—than in an audio book. The cold math tells us it's just not possible to get everything down. Add the high cognitive load of leading an interview (as I talked about in the previous chapter), and you're done for. As transcriptionist Jo Ann Wall puts it, "It can be a challenge to listen purposefully in order to determine matters of importance and screen out extraneous information."

You do need to get *everything*. In the moment, you will miss details, misconstrue intent, or mishear a word. It's important to have an accurate version of the interview to go back to. The bottom line is that you should be recording your interviews—something I talk more about in more detail later in this chapter.

While I prefer to focus entirely on my interaction with the participant, some people find that taking notes helps them filter, synthesize, and ultimately better remember what is being discussed. The act of writing notes helps them process what is happening. They come away from the interview with pages and pages of handwritten rough notes. If you do this, remember that you must maintain eye contact while writing. Don't rely too heavily on asking your participants to wait while you catch up with what they've said. Worse still, you don't want to evoke the clichéd therapist who is bent into her notebook, muttering "mmm-hmm" and never looks up. By the same token, avoid overly signaling what you are interested in by scribbling furiously in response to certain types of input or response.

If, like me, you don't benefit from the act of note taking, you can assign this task to another researcher who joins you (or even a third party who is simply tasked with documentation). As you include other forms of documentation, you can easily become overwhelmed with devices and tasks outside leading the interview itself, so consider what can be assigned to a supporting interviewer.

As mentioned in the previous chapter, you can also take notes about what you want to remember during the interview, as a way to manage the expanding tree of the interview, as well as jot down topics you want to come back to.

NOTE (MIS)INTERPRETATIONS IN THE MOMENT

In one interview, I asked a participant, "If you and your wife own one iPod, how do you determine who is going to use it?" He responded, "Well, for commuting, it's either the iPod or the New Yorker." Two different scenarios are likely—1. She takes the iPod on the train, and he drives the car, a New Yorker, or 2. Whoever takes the iPod gets to listen to music, and the spouse gets to read the most recent issue of the *New Yorker* magazine. I didn't get to ask a clarification question, and it wasn't until I went back to the video that it was clear that he was referring to the magazine. In that same session, the participant, talking about iPods and design told us, "Well, when you do that, it looks more Zen. It actually looks like the competition" and another participant added, "Yes, it's like he says, very Zen, very Japanese, very spiritual." But that's not what the first participant meant by "Zen." He was referring to another MP3 player that was around at the time, called the Creative Zen. Misinterpretations in the moment are inevitable, so you need proper documentation to resolve it later.

Typing vs. Writing Your Notes

Many people can type faster than they can write. Typed notes can easily be shared electronically, and no one has to read your handwriting or interpret your spelling errors. However, taking notes on a computer creates other challenges. Do you have sufficient battery power or will you have to plug in? Can you type without clackety-clacking? What if you move around in the environment? Can you quickly move your laptop and still type on whatever surface is at hand? Can you continue to appear engaged even as you glance back and forth at the screen? Although this is also an issue when writing notes by hand, breaking eye contact to look at a screen can appear to be more rude (as participants wonder if you are checking email), while the screen itself can be more distracting for you.

Tablets and smartphones offer an alternative: although you won't be seen hiding behind the screen or lid, looking at a mobile device during the interview can be even more fraught with faux pas. It's not impossible to work around this issue, but simply showing up and using your smartphone as if you were in a meeting or on a date isn't going to cut it. Throw in the lower typing speeds, and you're limited in what you can do with these.

It's a good bet that interviewers who use note taking to help remember the interview are doing some kinesthetic learning; perhaps that effect isn't quite as strong when typing. If your goal is to juice your own memory, stick with writing. If you want roughs of the interview that can be shared (and you can keep your device interactions on the down-low), then type. And if you live for the moment, set it all aside and just focus on your interactions with your participant. Regardless, make sure that you are recording the entire interview using audio or video, as I discuss later in this chapter.

NOTE **LIVESCRIBE SMARTPEN**

LiveScribe makes something called a *smartpen*, which is a pen that records both audio and handwritten text (using special paper). After an interview, you can play back the audio from a certain portion of the interview by tapping on the relevant spot in your notes. Researchers who like taking notes find it generally unobtrusive and effective. Since I'm not an active notetaker, it's probably not a solution for me, but ethnographer Tricia Wang documents her evolving experience with her LiveScribe at **http://rfld.me/ZunZGi**.

The Notetaker's Voice

When taking notes, you should be descriptive, not interpretive. If Larry tells you he has worked 14 hours a day for the last 10 years, your notes should read "Worked 14 hrs/day for 10 years," not "Larry is a workaholic." If it's crucial to capture your interpretations, be sure to separate them from your observations, using capitalization or some other visual cue, such as "IS LARRY A WORKAHOLIC?" At this stage of rough notes, it's easy to lose track of what you were told versus the conclusions you made, so take care in how you document the two.

Audio Recording the Interview

An audio recording will capture all the verbal interactions between you and your participants. Of course, you can't see the demonstrations or exercises. Something like "I'd probably put this one with that one because they're kinda the same" might be hard to interpret later if you don't remember which items were being discussed. Although you can facilitate the discussion for the benefit of the audio recording (narrating what the participant is doing, like "So you would put the blue prototype in the same group as the orange prototype?"), it can feel unnatural. You shouldn't be treating the documentation as more important than the interpersonal interaction.

Depending on the environment, you can probably get away with a simple digital audio recorder. They are small and hold hours and hours of audio. Some background noise—especially clattering dishes and background music—can appear more prominent in the recording than you experience it, so perform some tests. Be aware of how loud you and your participant will sound in the final recording.

You might want to add an external mic to your audio recorder; think about whether it will allow you to move around the environment and whether it will pick up audio from multiple directions (at the very least, there's you and your respondent). Especially for the audio-tech newbie, I don't recommend a body microphone—everyone will have to be mic'd, and often a new participant will join spontaneously, different mics need to be mixed, and so on. The biggest concern is that attaching a body microphone is an intimate act that needs to happen at the beginning of the interview. When your relationship with the participant is at its most vulnerable, they will need to—with your guidance—attach a small device to their clothing, near their face. This is a delicate interaction that doesn't seem necessary if you can be satisfied with the audio quality.

You can also use a recording app in your smartphone, but test it first. Does your phone have enough capacity? What happens if a call comes in? Will your batteries last? And are you able to easily monitor the recording status of the app? There's nothing worse than realizing that your recording device has not actually been recording for the past half hour!

TIP TRANSCRIBING YOUR AUDIO FILES

You can get transcripts of your audio files (or even of the audio track of your video files). There are many transcription services that will take digital files via FTP (as they may be too large to email) and email back Word documents a few days later. Most services can remove "ummm..." and other hesitations and repeated words. This is called a "clean verbatim" transcript. I prefer to have those bits and pieces included because they help make the transcription come alive, revealing the personality of the respondent as well as illustrating the thinking process that goes into answering questions. I think this sort of human metadata is helpful in interpretation and analysis.

Costs for transcription depend on the total number of voices (how many interviewers and how many participants) as well as other typical factors like turnaround time, but you can expect to pay between $1.50 to $2.00 per minute.

How to Get Video as Good as Your Insights

by Ted Frank

Ted Frank is a storyteller with Backstories Studio. He has been in marketing for over 20 years and in consumer insights and strategy for more than 10.

FIGURE 7.1
Ted Frank, Storyteller, Backstories Studio

As a company that has created hundreds of videos for research and strategy firms, Backstories Studio has seen too many examples of stellar research work become unusable because of poor video or sound quality. And it breaks our hearts. What's more, for some clients, the video deliverable is often the only way they see your insights. So it often becomes the way they evaluate you as well.

Here are some tips to get high-quality video, even if you have only five minutes to set up and have never been to film school:

- **Respondent placement:** Where you place your respondents is the biggest key to getting good quality. Pick a space that is quiet and bright enough to see the color of your respondent's eyes. And unless it's important to the project, select a place where the background does not distract from your respondent.
- **Light:** People tend to look best when light comes from the side and slightly in front of them (up to a 45º angle). A window works great in the daytime. Lights will work at night. Don't place your respondents with the window behind them, or they will appear dark. Lights shining down will light them, but they will appear older because of the shadows those lights create. Lighting them from the front will also work, but they can end up looking like an episode of *Cops*, and if light is in their eyes, it will make it difficult for them to see you. See Figure 7.2 for an optimal setup.
- **Sound:** In research, sound quality is often even more important than picture quality, especially if you're picking clips by what your respondents say. Where you place your microphone is everything. It's just like real life: People sound intimate when they're close to you and can be hard to hear when they're across the street. Shotgun mics work well for groups if you can point them at the person speaking. Because that's difficult, though, a second mic in the center of the group will save you. A lot of researchers get scared when they see that some of these mics can cost $400. However, if you rely on your camera mic alone, you'll end up paying that same money in editing costs to reduce the room noise. And your clip will still never sound as good as it would have if you placed the mic closer to your respondent to begin with. So it's better to spend the money initially and let your work shine.

- **Setting up the camera:** Thankfully, cameras have gotten a lot better over the years. An HD camera is a lot more affordable and will give your editor many more options for your final video. When setting up your camera, place it in front of your respondent, with the moderator in between it and the light or window (refer to Figure 7.2). It works best if the respondent is framed a bit to one side and looking across the frame, toward the moderator. When respondents look directly into the camera, the setting appears staged.

Frame your picture close if you want to capture emotion, but leave room in case your subject shifts or sways (and he always does). That will also leave you room for a nametag if you choose to place one in your video. Finally, look again at your respondent's eyes. If you can't see the color, move the light closer until you can.

Practice a few times before you get into field, and you'll be able to set all this up in just a few minutes. You'll end up with impressive video, and a lot fewer hours and expenses down the line.

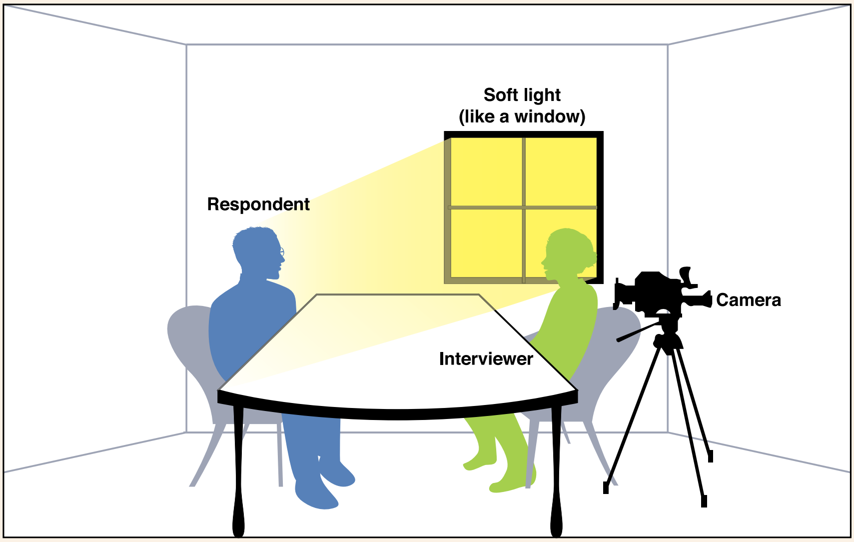

FIGURE 7.2
An optimal setup for placing the camera.

Video Recording the Interview

Video cameras are small, unobtrusive, and make for a viable default recording device. I take audio recorders as backup, but rely on video in most situations. With a video camera, you can capture the specifics of what the participant means by, "That part right there is the best one to use." You also can capture body language and nuanced elements in the conversation, which, of course, is not possible with audio recordings.

Buy an inexpensive mini (or "tabletop") tripod. This will make it easier to set the camera down during stationary parts of the interview, but will still allow you to easily grab it when you move around the environment. I haven't found that the presence of the camera is intimidating for people (especially in a post-YouTube era where it's a medium that we are all generally more familiar with), but setting it and forgetting it helps to focus you on the participant and the interview, rather than on the camera. When you are holding the camera, be aware that, even when it's facing away from you, the microphone is much closer to your mouth than the participant's, so be sensitive to your interjections, snickers, and mm-hmms, as they will really pop on the audio. For the novice interviewer, don't worry about moderating your rapport building for the camera, but for everyone else, it's worth keeping in mind.

TIP **DON'T RUN OUT OF JUICE!**

Be sure to have enough batteries on hand to get through the interview. I've found that cameras ship with a fairly small battery, but larger-capacity batteries are available, including compatible ones from third-party manufacturers. Shop online and stock up.

Although some cameras can adjust for backlighting, you should generally avoid having your participants in front of a window; even if you can see them, they will probably just appear in silhouette on the video.

Be prepared to manage the large files you create. Even on the lowest-quality settings, over the course of a small study you can end up with 20GB of video without trying too hard. That much digital data can fill up drives and is almost impossible for mortals (those of us with non-Pixar quality infrastructure) to move around a network.

Even if we don't edit video into a specific deliverable, it's often the richest archival artifact of the fieldwork. Video also reassures our clients that they can go back at any time to watch the interviews.

Photographing the Interview

Even if you're capturing imagery using video, still pictures are essential. When you make the deliberate choice to point and shoot, you are building the story of your participant. Even if the image in the camera is similar to a frame of video, that frame is packed in with all the other frames of video and requires effort for you to extract. You can return from the field with a set of photos and easily share an impromptu narrative of the interview by flipping through the photos on the camera. Even better, you will notice details in the photo that you didn't consciously perceive at the time. Video, with its audio track and its movement through time, doesn't as easily afford that extra detail. You might choose to just take still pictures and record audio and not bother recording video.

Be aware of how your picture taking will feel to the participants. Even though they agree to the use of photography when they sign your release, let the interview settle in before you start taking pictures. You can verbally confirm that it's okay before you take your first picture. If you are taking pictures of people, do it without the flash. If your second interviewer is taking pictures, they should not distract from the interview.

As I mentioned in Chapter 3, prepare a shot list so you have some ideas about which pictures you need to take.

Sketching the Interview

Sketching can be an appropriate medium when you can't take pictures. If you can't get an image of the participant's online banking screen, you can sketch the different regions of the interface and write callouts for some of his comments. Because he can see the sketch, he can be reassured that you aren't capturing private information and can clarify and correct your notes.

Caroline James takes that even further, using sketching as an active method to reflect back to her participants what she's hearing and to draw them out further (see Figure 7.3). She uses a combination of several specific techniques: visual recording, mind mapping, and visual note taking (sometimes referred to as "sketch noting").[1] She sketches in front of (and even with) her interview participants to engage them in creating a visual document of the interview.

I worked in the field with designer Jorge Gordon. His technique for note taking lay somewhere in between purely visual and purely textual; he used only words and lines but created a visual flow that captured his own experience (see Figure 7.4). As with many aspects of interviewing users, note taking can be highly individualistic.

TIP COLLECTING ARTIFACTS

Collect tangible examples from your fieldwork experience—buy an item from the company store, ask for a brochure, save your security pass, or keep the sample printout. These artifacts can go up on the wall in your analysis room, be passed around in meetings, or referred to later for inspiration, validation, or further insight.

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1 A great intro is at http://rfld.me/QQ1Soj; also check out resources at http://rfld.me/SPXQfG.

FIGURE 7.3
Caroline James took these notes while interviewing me about this chapter.

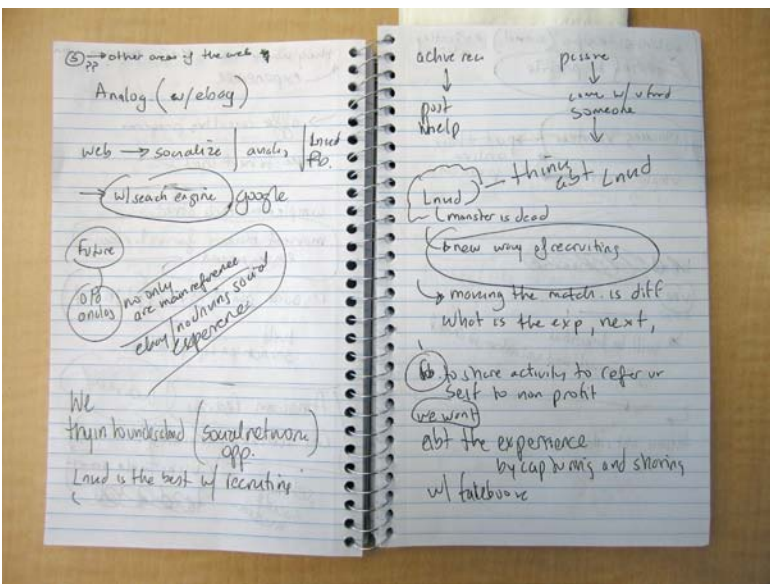

FIGURE 7.4
Jorge Gordon's fieldwork notes that include both sketch and text elements.

Debriefing After the Interview

When putting together your fieldwork schedule, you must absolutely allow time for debriefing after each interview. After you leave the fieldwork site, go for food and drink and talk about the interview. The longer you wait (say, until the next day or the next week), the less you will remember, and the more jumbled up the different interviews will become.

If you debrief as an open-ended conversation, make sure that someone takes notes (and shares them with everyone). Otherwise, use a debrief worksheet (see Figure 7.5) to capture initial thoughts, surprises, and changes for subsequent interviews. Ask, "What would we design for *this* user?" Don't worry about being too conclusive; this is a provocative way to start making sense of the interview. You aren't making design decisions; this is hypothetical, speculative, and easily discarded when future data takes you in a different direction. Make sure that your fellow researchers understand hypothesizing conclusions as a creative exercise.

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Portigal consulting

Debriefing Guide

participant: ________________ **researchers:** ________________ and ________________

Fill this out immediately after the interview, together with both interviewers. This document will serve as a key resource for the collaborative fieldwork debrief and analysis so please be thoughtful and thorough.

GETTING TO KNOW YOU-- *describe*

Describe the person we spoke to. What do they do? What are they into? What is their home environment like?

How did they describe their process of getting DEVICE?

LIFE WITH DEVICE

How are they using the DEVICE? What features are they using? What does this device mean to them?

What kinds of accessories do they use? Which ones aren't they using? Why?

What do they like most about the DEVICE? How is it best serving their needs?

What challenges have they had? What are some of their unmet needs and wishes?

What surprised them? What surprised you?

FIGURE 7.5
Sample debrief worksheet. See more at http://rfld.me/QLhHzy and http://rfld.me/UJkyHA.

Taking Field Notes

Many researchers sit down shortly after the interview and write up notes in some detail, using their notes, memory, and recordings. These field notes can easily run several pages long and emphasize narrative and description over conclusions or business implications. This is a time-consuming task and something I've stopped doing, especially since I began using transcripts. For trained social scientists, this is likely part of their training and an essential part of their process; while it is undoubtedly valuable, consider whether you have time in your schedule to do this.

Sample Field Highlights

by Kristine Ng, for the Omni Project[2]

The Elway family is composed of Arthur (dad), mom, and three kids (ages 13, 10, and 7). They recently moved to City 1 from City 2 and didn't have Internet for a month, which the kids thought was dreadful.

Arthur and two kids—Denise and Hayley—took part in the interview. Denise has a Kindle Fire, iPod, iHome, and cell phone. She really wanted a Nook, but her father persuaded her otherwise, since B&N isn't a tech company. She said she's tired of Apple products. She FaceTimes with her friends instead of talking on the phone, and sometimes texts them. Hayley has a first-gen iPad and iPod. She's eagerly waiting until she's old enough to get a cell phone. She's been promised one in February when she starts soccer, more as a means of communication with parents for rides and so on.

Regulating device use is a main concern for the family. Denise lost access to the Kindle as a punishment for misuse. Dad said that when they're doing homework they're only allowed to listen to music, but the girls have been caught FaceTiming and watching TV while doing homework. Arthur is interested in a solution for regulating these multi-use devices since part of their use is educational. He mentioned that City 2 is more affluent and the peer pressure is greater. There are second graders with cell phones (he doesn't think they need them) and 13-year-old girls with 10 pairs of Uggs. They're constantly trying to determine how to hold onto their values while understanding that peer pressure is real. Both parents closed their Facebook accounts, partially to be good role models, but her father also has privacy concerns. He would love to know what the best practices and guidelines are for device regulation.

2 A study about the impact that digital technology is having on our lives. See www.portigal.com/blog/announcing-the-omni-project/ for more info.

Sharing Field Highlights

As soon as possible after an interview, I write a rapid top-of-mind version of the session. I am not focused on capturing all the details but am creating a sharable story that brings a bit of the flavor of the fieldwork to the broader team. With practice, these highlights (which I affectionately refer to as "quickies") take only a few minutes to write and email. Some of the effort to produce these highlights is in restraining yourself from trying to produce field notes. See an example of field highlights in Kristine Ng's sidebar on p. 116.

Summary

By documenting the interview, you are capturing a definitive detailed record of the interview. It's also a way for you to process and remember the insights and take-aways that come to you while the interview is happening.

- You can't catch everything by taking notes. You do need to get *everything*. In the moment, you will miss details or mishear a word.
- Recording audio or video is the only way to capture all the details of your interview.
- If you take notes on a computer or other device, can you do so silently and maintain your engaged eye contact with the participant?
- Notes should be descriptive rather than interpretive; when you go back to them later, it's hard to tell the difference between what actually happened and your own interpretations.
- Use a small video camera with a pocket tripod or a simple digital audio recorder; external mics will improve audio quality, but body mics create an awkward interaction with the participant when setting up.
- Have plenty of batteries for all of your devices and be aware of how long they should last.
- Take lots of pictures; they often reveal something different later on.
- Sit down with the field team right after the interview and debrief about key take-aways. Soon after, write up quick highlights and share them with the rest of your team.

CHAPTER 8

Optimizing the Interview

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An interview is an interaction between two humans. Or throw in a colleague and a spouse, and now it's an interaction between four humans—irrational, emotional, language-using, unpredictable humans. The only one of these four you have any control over is yourself. This is a messy business. There will always be variables and curve balls. This chapter looks at some of the more common challenges that you will face in the field. It also suggests a number of ways to develop your own skills so that you are prepared for future surprises.

Troubleshooting Common Interview Problems

Many of the situations discussed in this section stem from something that happened leading up to the interview, such as how the participants were recruited. The best troubleshooting approach is to prevent these problems from occurring through proper screening and clear setting of expectations. Realistically, though, they will still come up.

When the Participant Is Reticent

Are you sure that your participant is holding back? As discussed in Chapter 6, his default demeanor and speaking rhythm may simply be out of sync with yours.

If you conclude that he is indeed uncomfortable, try to identify the cause and make a change in the way you are handling the interview. You might simply need to accept the awkwardness and be patient with yourself and with him, looking toward a point where he becomes more comfortable. If he is connecting better with one of your colleagues, ask that person to lead the rest of the interview. If there are too many interviewers, ask one of them to step back. If you aren't giving your participant enough verbal space to reflect and respond, slow down and let him talk. If your participant needs more structure, fall back to straightforward, direct questions.

Consider which aspects of your topic might be making him uncomfortable. Even if an interview doesn't explore social taboos, you may be tapping into an element of personal insecurity about his job, his competence, his intelligence, and so on. Or you can change the topic, share your enthusiasm for his talent, or reveal something about yourself.

Sometimes you might find yourself in a different situation than you had anticipated. For example, an interview with a certain type of professional turns out to be an interview with that person *and* his manager. If you can't get the interview you want (perhaps by gently suggesting you interview them each separately), be aware of the dynamics and adjust your questions appropriately. Ask the manager questions about herself or about her understanding of how the work is performed.

If all else fails, consider asking your participant outright to identify the source of his discomfort. Tell the participant that this information is important to you and your work and that you are deeply interested, but you are concerned that he isn't comfortable with the conversation. Ask what would be better, even if it means a different time or a different location.

When the Participant Isn't the Right Kind of User

Assuming you've screened your subject, you might wonder how that person can end up being wrong for the study. If you are surprised—or even uncomfortable—at how reality differs from what you expected, that's a crucial insight. But don't be hasty to dismiss the participant.

If you've taken the time to travel to this participant's home or workplace, you should complete the interview. Consider what you might do with the 45 minutes you could save by cutting out early and how that stacks up against the possibility that you might learn something by interviewing this person about his experience and perspective. Reset your expectations and see what you can get out of the session. Afterward, revisit your screening criteria. You may have uncovered the fact that a word or phrase in the criteria is being interpreted differently by participants (for example, "late-model car" could mean one thing to your team and another to the people you are recruiting). Also, if you have identified additional factors for the rest of the participants, you might want to rescreen them.

NOTE **GETTING THE RIGHT PARTICIPANT AND THE RIGHT CONTEXT**

In several studies, I recruited participants who were users of various devices (like laptops, video cameras, and MP3 players). They had told us they owned these devices and used them for whatever tasks we were interested in. But several times I found myself at the interview, discovering that the device in question wasn't actually at their home, where the interview was conducted. One person worked for an airline and had homes in two cities. Another person met us at his girlfriend's house, where none of his stuff was located. Another lived with roommates and her young children, while her computer was at the home of their father. And so on. After this happened a few times, I updated the language of my screener to ensure that the interview would take place in their primary residence and where the device was, and that they would be prepared to show us the device during the interview.

During another project, we were seeking people who were actively sharing certain types of information. One participant was indeed actively sharing this information, but only with his immediate family, with whom he lived some of the time. We hadn't specified that "sharing" should take place with a broader network, and even though we had reviewed the screener with our client, no one had seen this as a concern. From this interview, it emerged that we all had different ideas of what "sharing" meant. Our client was very concerned since they had conceived of sharing as a different behavior. In the interview itself, we focused on learning everything we could from this participant, but in the aftermath we had a number of intense conversations with the client to determine whether or not this participant was acceptable for the study.

When the Participant Won't Stop Talking

As you settle into a rhythm with participants, you may realize that they talk extensively, requiring little or no prompting from you. Before you try to "fix" this issue, ask yourself whether this really is a problem. You have prepared extensively and have a lot of questions you're hoping to ask, but are you getting what you need from this participant? If you don't feel in control, you might be annoyed, but keep the emotional factor separate and assess the interview in terms of the information you need. In some cases, they won't be answering your questions at all. Give them space to tell the story they've chosen to tell you and then redirect them back to your question. For example, consider the following exchange, which is drawn from a real experience:

> **Q:** What kind of food do you prepare for yourself?
>
> **A:** When I was a child [long story about her mother, etc., etc.]
>
> **Q:** So how does that experience as a child impact the decisions you make now for your family?

Your last resort is to interrupt. If you must interrupt, frame it appropriately—"Excuse me! I'm so sorry to interrupt, but I know we have a limited amount of time, and I want to make sure we cover the topics we're here to learn about."

NOTE **CONFERENCE INTERRUPTUS**

I was at a conference in Bangalore. The last session of the day included a fairly spirited Q&A. There were two microphones going around, and while an audience member and a panelist were going back and forth on one mic, I got the other. The discussion was degrading; the audience member was fixated on some issue and was not going to let it go, but there was no resolution. The conversation had devolved into posturing and deflection. People began to get annoyed and mutter and shift in their seats. They saw me with the microphone and began, quietly at first and then more insistently, to encourage me to interrupt. I could see that interrupting was within the norm for this culture, but even as I was standing up and being cheered on, it was extremely difficult for me to interrupt. I succeeded in opening my mouth, but nothing came out. Twice. Meanwhile, the droning, time-wasting back-and-forth continued, and my fellow attendees were losing patience with me. Finally, I was able to interrupt, but it was a significant challenge, even with all the affirmation! In an interview, I find interrupting just as difficult and do it only when I absolutely have to.

When You Feel Uncomfortable or Unsafe

Unless you are going to a public or familiar corporate location, don't conduct interviews on your own. When you arrive at a location, verify that everyone feels safe. Pay attention to the difference between *unsafe* and *uncomfortable*[1]. If you feel unsafe, don't go in. If you feel uncomfortable, try to set that feeling aside and proceed (see Figures 8.1 and 8.2).

FIGURE 8.1
Check your gut reaction. If you feel uncomfortable, it may still be okay to proceed.

1 See http://johnnyholland.org/2009/06/lets-embrace-open-mindedness/ (scroll down to the section entitled "Getting Out of the Comfort Zone") for some thoughts about acknowledging people's discomfort in new or different situations). Coming to grips with this discomfort is a wonderful way to grow as an interviewer.

FIGURE 8.2
If you feel unsafe, pay attention to that feeling and stay away from dangerous places.

There will be plenty of strange interviews. It's an hour or two of your life; if you aren't in danger, do your best to learn what you need to learn, acknowledge that life is interesting, and add the experience to your set of war stories.[2]

Women are unfortunately more likely to encounter awkwardness and comments that push the boundaries. If you feel increasing discomfort in response to someone else's behavior, take a moment to pause and identify what's happening. You might want to call for a bathroom break. If you are at risk, leave. Otherwise, you can ignore the behavior (but not the person) or restate your objectives and give the participant the opportunity to agree to continue with that focus. Of course, be aware of your own limits and be prepared to leave if the situation deteriorates.

2 Danger is a personally subjective issue. In this video https://vimeo.com/9217883, Luis Arnal describes his design-research adventures, including arranging with gang leaders to gain access to Brazilian slums (know as favelas) for fieldwork, the consequences of inadvertently photographing an FBI undercover operation, and (if not dangerous then perhaps uncomfortable) participating in one of Spencer Tunick's massive nude photo shoots.

NOTE **THE MINOR MELTDOWN**

After a long few days of fieldwork, my client and I headed to Los Angeles's Toy District to interview a wholesaler. Driving separately, we had each struggled naïvely through traffic the way that out-of-towners do and were searching for parking. I left my car in a no-parking spot and went to verify our meeting location. Our interview was with a small business owner. I was picturing a typical retail setting, with a familiar storefront, street numbers, etc. Instead, I found a street filled with stalls jammed with merchandise, with few prominent building numbers (many were just scrawled in marker on the outer edges of the stalls). Something about this did not feel right, so I called our recruiter and got confirmation that we were indeed in the right place.

I left my car in a lot and walked to meet my client, who was still in his car, circling. I got into his car and related my impressions as he navigated traffic, still looking for parking. The long days, the daunting traffic, the unfamiliar surroundings, and the parking problems had been accumulating until something within him snapped. He turned red, made a sudden turn, and floored the accelerator. Fortunately for me, his venting of emotions gave me space to be "the calm one" (although no doubt I had fed his anxiety with my own). We drove a few blocks, and I made some very concrete suggestions about where to park. Once calmness returned, we both could see that there was nothing really wrong, but we had just reached the end of our ropes. We got some food and walked back to our interview. We were overwhelmed and exhausted, and the lack of familiarity caused a brief and intense descent into fear. That experience with the fight-or-flight reflex helped me more finely parse the difference between discomfort and danger.

Interview Variations and Special Cases

While I've devoted much of this book to the optimal case where you and your participant have arranged the best possible interview situation, there are inevitably exceptions. In this section, I'll look at how to deal with some of these situations:

- You and your participant are not in the same location.
- You meet your participant in a neutral location, out of his context.
- You have only a short amount of time for the interview.
- You are interviewing people as "professionals" rather than as "consumers."
- You have multiple participants in a single interview.

When Your Interview Isn't Face-to-Face

Phone interviews are a fairly common alternative to face-to-face interviews, especially when geographic distance makes a face-to-face interview unrealistic. Since you won't have as much context (see Figure 8.3), look for other ways to compensate. Ask participants beforehand to send some digital photos of their environment or to describe elements you won't be able to see during the call. When arranging the interview, establish their expected location. (For example, will they be in their car in traffic, or will they be at home caring for their children?) At the same time, confirm the length of the interview. For most people, an hour is a long time to be on the phone.

During a phone interview, a lack of facial cues makes it a bit harder to adjust your pace and rhythm to the participant. Experiment with giving your participant an extra beat of silence to ensure she feels permitted to speak, and to allow her to continue to speak. If silence is making her uncomfortable (you get a, "Hello? Are you there?"), pick up the pace a bit and introduce verbal handoffs (such as, "Go ahead…please continue…").

If you use technologies like Skype (for audio or video) and FaceTime, you are introducing other complicating factors:

- Your participant might not be fully proficient at using these tools. It's not ideal to begin the interview having your participant exasperated and feeling incompetent.
- You are subject to the variability of Internet connection speeds (and software reliability) on both ends. Four minutes of reconnecting and dropping calls is not acceptable, so arrange for a technology test before the interview.

FIGURE 8.3
When the interviewer and participant can't see each other, it's anyone's guess how their contexts differ.

- Not everyone is fully literate in video conferencing. Consider your audience. You might want to warm up the interview with a discussion of the communication context ("It's unfortunate we couldn't meet with you face-to-face. Do you regularly meet with people via Skype?").

When Your Interview Is in a Market Research Facility

Focus group companies offer meeting rooms designed for market research, with mirrored-wall observation rooms, video recording, and all the other accoutrements. It would be a mistake to consider these facilities as neutral third places. When you invite people to come to a facility to be interviewed, they are coming to *your* house. Unfortunately, all the comfy couches, Nerf balls, and tasty snacks don't change that. You must be the host instead of the guest. Even if you don't feel settled in this new environment yourself, you must welcome them into your space. You can ask them to bring something of theirs (photos, artifacts, or a collage) to the interview, but this approach is a definite compromise.

When Your Interview Is Very Short

If you can get only a short amount of time from people, warm them up ahead of time. Get them thinking about your topics by emailing them some key questions to think about. They don't need to write up their answers ahead of time; they can just be reflecting on these topics and be prepared to share some perspective. You won't have time to probe too much. Stick to the agreed-upon time unless they offer to talk longer, and then make an explicit request for a follow-up interview.

The Differences in Interviewing Professionals vs. Consumers

Consumer interviews will probably take place in the home. When interviewing professionals, you might find yourself on a trading floor, in a hospital, in a restaurant, in an office, in a manufacturing facility, or in any other kind of environment. Professionals might have to perform their work tasks intermittently or continuously as they are interviewed, so you might be doing bouts of passive observation, or you might be asking for narration of processes rather than exploring other topics. Depending on what you need to do when interviewing professionals, you need to be very specific in your interview request—duration, environment, role, and so on.

Consumers might default to treating your interview like a *visit*. Professionals often frame the interview as a *meeting*. You can choose to operate within those expectations, or you can seek to shift them, but keep in mind where your participant is coming from.

Interviewing Multiple Participants

We often ask other family members to join interviews, or we may speak to colleagues simultaneously when interviewing professionals. This is best when you aren't expecting power dynamics to significantly impact the interview (such as a subordinate being asked to explain his career goals in front of his boss; or a teen being asked about her alcohol consumption in front of her parents). If need be, you can break the interview into separate chunks for each participant individually and for the group together.

In terms of group dynamics, your goal should be to get the participants talking extemporaneously, even to each other. Do not conduct two parallel identical interrogations; instead, gently lead a conversation by throwing your questions open and using eye contact and specific probes directed at individuals to encourage them to contribute. As you hold back, they will step forward.

Instead of this:

> **Interviewer:** When did you start drinking Kombucha?
>
> **P1:** About six months ago.
>
> **Interviewer:** How about you, when did you start drinking Kombucha?
>
> **P2:** It was about four months ago.
>
> **Interviewer:** And what is it about Kombucha that draws you to it?
>
> **P1:** I like the taste.
>
> **Interviewer:** What about you?
>
> **P2:** I like the way I feel after.

Aim for this:

> **Interviewer:** When did you each start drinking Kombucha?
>
> **P1:** About six months ago.
>
> **Interviewer:** [Pause]
>
> **P2:** Oh, for me it was about four months ago.
>
> **Interviewer:** And what is it about Kombucha?
>
> **P1:** I like the taste.
>
> **P2:** You do? I actually can't stand the taste but…I like the way I feel after.
>
> **P1:** But tell them about what happened when you drank that tiny bottle last week!

You'll have more success with people who already know each other. As I mentioned earlier when considering the number of interviewers, people influence each other simply by being together.[3] The more people you include, the more you'll experience that effect.

Using Different Interviewing Techniques at Different Points in the Development Process

Regardless of your business objectives, you always want to understand how the participant makes sense of the world, and what problems and concerns they have. You may be early in the development process and have broad questions, or you may be further along and have hypotheses (concepts, animations, storyboards, designs, wireframes, and more). In the latter case, spend the first part of the interview understanding the participant's workflow, objectives, pain points, and so on. Then, when you share the artifacts you've brought, you have a better chance at understanding *why* they are responding the way they do. If you aren't interested in that amount of detail and just want reactions to your prototype, you're better off doing usability testing, not interviews.

Improving as an Interviewer

Now that you've learned some techniques for interviewing, you can hone and refine your performance further by practicing, reflecting, critiquing, collecting, and sharing.

Practice

Don't forget that interviewing is like any skill: the more you practice, the better you get. Even the busiest researcher only gets to do a certain number of interviews, so be creative in generating or finding other opportunities to practice. Take advantage of brief everyday encounters (say, that loquacious taxi driver) and do a little bit of interviewing, asking questions and follow-up questions. Cultivate a style of interacting socially that emphasizes listening, reflecting back the other person's comments, allowing for silence, and so on. Try for longer and deeper conversations to build up your stamina.

When you are in the field, remember that each interview is also a learning experience. Try something different once in a while. Use the interview guide from back to front while still maintaining rapport and keeping a comfortable flow; force yourself to count to five before everything you say; don't just take notes, take copious notes.

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3 See http://en.wikipedia.org/wiki/Asch_conformity_experiments or http://en.wikipedia.org/wiki/Normative_social_influence for more.

Reflect

You can get the most out of any interview by reflecting on it. Football coaches review game films, and user researchers can do similarly. You have the material: audio, video, or transcripts. Otherwise, conduct and capture mock interviews specifically for this purpose. Look for moments that went well or moments that went slightly awry and think about what you would do differently. Don't beat yourself up about how you handled it in the moment; the benefit of reflection is that you can stop time and consider a range of options.

Seek out opportunities to be interviewed yourself. Although phone surveys or online customer satisfaction surveys use a different methodology, the participants aren't thinking about that; they are just being asked questions. Sign up for market research databases or volunteer for grad student studies. Go through the experience and notice when it feels bad (and anytime it feels right). You can use these insights to avoid, or replicate, such interview techniques.

Leverage your past experiences with strangers, such as going on blind dates, working as a bartender or waiter, being interviewed for a job, and more. What principles did you develop in those situations? Consider what worked and what didn't and why.

Critique

In addition to reviewing your own interviews, review other people's, too (and ask them to review yours). Tag along during interviews and watch someone's technique. Teach someone else how to lead an interview. Or ask someone to come along to your interviews and get his feedback. Also ask for feedback from the rest of your field team (even if you are the lead interviewer), or even from your research participants.

Check out interviews in the media: Terry Gross, Charlie Rose, Barbara Walters, Oprah Winfrey, and Marc Maron are good places to start (see Figure 8.4). Watch and listen as an interviewer, not just an audience member. Although the context of journalism (writ large) differs from user research, you will notice techniques both new and familiar.

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FIGURE 8.4
Marc Maron is a comedian, not a journalist. His interviews (see Chapter 6) are a good source of both positive and negative examples.

And More

Collect and share your fieldwork *war stories.*[4] These experiences—the crazy household, the dog that does his business on your shoes, the GPS failure—are inevitable and are often hilarious (at least in hindsight). Exchanging these stories is a way of sharing techniques and creates learning opportunities for both the tellers and listeners.[5] A culture of exchange—wherever you can find it—is going to help you grow your own skills. You can check out (and contribute to) a growing archive of fieldwork war stories at www.portigal.com/series/WarStories.

4 As in this Merriam-Webster definition: "A recounting of a memorable personal experience, especially one involving challenge, hardship, danger, or other interesting features."

5 In Per Brandström's thesis *Boundless Universe: The Culture of Expansion Among the Sukuma-Nyamwezi of Tanzania,* he describes how anthropologists in the field often gather at a hotel bar and "release a torrent of stories about bizarre and remarkable happenings and experiences in exotic settings, and each anthropologist will try and top the others' wildest stories... When the laughter dies away and the entertainer is transformed into the scientist, a sudden change of scene has taken place. The anecdotes and the wild stories are stowed away. Now order is the rule of the day; facts and theories will be presented."

Take an improv class. Improv training helps develop many aspects of interviewing, such as being in the moment, holding back judgment, and listening.[6] Alternatively, meditation can help you be present during interviews and develop the mental energy it takes to focus deeply on someone else.

Connect with other interviewers online[7] and at conferences.[8] Read books about interviewing (Hey, you're doing that right now! Well done!) and about interpersonal communication.[9] As you learn more, you can identify your own personal style and adjust for it.

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6 I've given a number of talks about improv in the context of design and design research. Video from one presentation is at www.ustream.tv/recorded/2595655 and the slides are at www.slideshare.net/steveportigal/yes-my-iguana-loves-to-chacha-improv-creativity-and-collaboration.

7 Try the anthrodesign group at http://tech.groups.yahoo.com/group/anthrodesign/.

8 In addition to design and UX conferences, check out ethnography conferences such as EPIC (www.epicconference.com).

9 For example, books by Deborah Tannen; see www9.georgetown.edu/faculty/tannend/.

Summary

Interviewing is made of people, and as such your experiences in the field will be unpredictable and surprising. Be prepared for what might go awry and how you will deal with it.

- If you feel your participant is reticent, be sure it's not just a difference between her speaking rhythm and yours. Try to identify what's making her uncomfortable and make adjustments. If necessary, ask about any possible discomfort. Or just accept the awkwardness and move forward until she opens up.
- You may not initially feel a participant is right for the study. Once you are there interviewing, stick with it. If he isn't what you expected (despite deliberate screening), that is something worth reflecting on later; meanwhile, what can you learn from him now?
- If you think your participant is talking too much, ask yourself if that's because you are feeling out of control or because you aren't getting the information you want. If you must interrupt, apologize and remind him that you value his limited time.
- In a phone interview, lack of visual cues makes it harder to adjust your pace and rhythm to the participant. Give her an extra beat and give yourself permission to feel awkward in those small moments of silence or overlap.
- If you have only a very brief amount of time for your interview, prime your participant ahead of time with some questions or topics you plan to discuss.
- When interviewing several people at once, avoid asking each person the same question in turn. Use eye contact to create a more free-flowing dialogue where some questions are addressed to an individual while others are thrown to the group. Allow them to follow-up each other's points and even ask each other questions.
- Be aware of the difference between discomfort and fearing for your safety. Develop a tolerance for the former but do not compromise on the latter.
- Improve your interviewing skills by practicing, varying from your habitual approach, reviewing transcripts and videos, and seeking critiques from others.