
Interviews: Observing Users

Observing people in the context of their daily work provides important insights into how people actually interact with real systems. A variety of different techniques are possible; this Master Class concentrates on three interviewing techniques that emphasize gathering specific, concrete examples of *Post-it*® note use, as well as “fly-on-the-wall” observation.

Interviews can take a variety of forms, for a variety of purposes. When your goal is to understand how people perform their jobs, it is tempting to ask general questions, such as "Tell me about your job". The problem is that you are most likely to get general answers that describe how the job is "supposed" to be performed. People usually answer in the same style as the question posed: vague questions usually produce vague answers. The trick is how to get specific information; examples that illustrate important aspects of the work. The following techniques help the person being interviewed to think of concrete examples of things that have really occurred.

- **Critical Incident Technique:** Critical incident technique emphasizes a specific, recent incident. Begin by asking the person to envision a particular incident that occurred within the past week. (In general, the more recent the better, since details are important.) The incident can be a situation that was frustrating, surprising, annoying or even funny. Ask the person to describe the incident, including what happened and why it was memorable. Ask for as many specific details as possible, then encourage the person reflect on why it was not typical. Usually, the person will give an example of a breakdown that occurred, followed by a description of the "normal" way things should work. If you are aware of other recent incidents that others have described to you, ask if they know of the incidents or if similar incidents have happened to them.
- ⌚ **Recalling a specific Time:** A variation of the critical incident technique involves asking the person to describe the events of a specific time and day, say, at 11:00 last Thursday. Even if nothing memorable occurred on that day, the person is likely to explain a 'typical' day; including a number of typical breakdowns. Often, people continue by describing other interesting examples and discuss other kinds of breakdowns that can occur during their work. In general, aim for specific details first, then ask for generalizations. Use this interview technique to contrast the "official" view of the work and with what actually happens.
- ⌘ **Life cycle of a particular *Post-it*® note:** One of the most useful interviewing techniques when discussing *Post-it*® notes (which do not often lend themselves to major disasters) is to simply ask the person to select an “interesting” *Post-it*® note, usually visible somewhere on the desk, wall or computer screen, and ask for its life history. When did it arrive? Who wrote it and why? What has happened to it since? What is likely to happen to it next? By focusing on the specifics, you can also learn how typical or atypical this *Post-it*® note is, and spark other discussions about related notes and the work practices that surround them.

Interview Exercise

Exercise 1: Videotape an interview, using critical incident and other techniques, to obtain specific information about how people use paper *Post-it*® notes.

Before you start: Plan several questions in advance, including at least one using critical incident technique. Also, think about what background information you need, such as computer experience or length of time in the job. Assume that your questions will change as you get into the interview setting and that new topics will come up. Think of additional questions (Who, What, Where, Why and How) as they answer, to give you more detail about how the person uses the system to support their work. Successful interviews should include descriptions of both "normal" and unusual uses of the system.

Remember, your goal is to get concrete, specific examples first and generalize from there. Try to envision the user setting and make some predictions about possible uses of *Post-it*® notes.

- ☺ **Decide on Roles:** Before you begin, decide who will shoot the video, who will take notes (the "scribe"), who will ask questions and who will "just observe". These roles are very important and will affect how you perceive the interview. The camera person will be distracted by the mechanics of shooting the video. (Always assume that shooting video will detract from your ability to observe the situation.) The scribe will be thinking about capturing the key elements of the questions and answers, and will get more information from the auditory than the visual channel. The interviewer may also be somewhat distracted by the mechanics of directing the interview. (When you review the video later, think about your role while the video was being shot and what you perceive when you view it afterwards.)

Note that, except for classroom exercises, it is rarely a good idea for four people to conduct a videotaped interview; two is usually best. The interviewer should concentrate on interviewing, taking notes only if possible. The camera person should concentrate on the video.

- 📄 **At the Interview:** Plan about 15 minutes to interview someone about their use of *Post-it*® notes. Begin by introducing yourselves and explain your purpose. For example: "We are interested in real examples of how people use paper *Post-it*® notes in their daily work. Would you mind if we spoke to you for a few minutes?" Tell the person how long the interview is likely to last (10-15 minutes).

Always ask if it is OK for you to videotape, even if the videotaping has been pre-arranged, and say what the video will be used for. Some people do not want you to videotape the content of their *Post-its*®. If you have an LCD screen, show them what your camera will see. In any case, explain that it is difficult or impossible to read what is written on the *Post-it*® notes. Also, you do not need video of the person, so it's best to let her talk while you shoot the *Post-it*® notes and documents she is referring to.

 **Shooting:** Set up the camera as explained in the video techniques section. Label a new video cassette tape and then shoot at least 20 seconds of the first title card *before you arrive at the interview*, with a voice-over giving the title, date and participants. Shoot a separate title card for each person being interviewed. (Tip: use different colored title cards to make it easier to search the video later for particular interviews.)

After you have explained what you are doing and have the user's consent, you can begin to videotape. Avoid shooting into a light, especially a window. Start with a wide-angle shot of the office area and (slowly!) zoom to the first *Post-it*[®] being described. After that, try not to move the camera. If you must move, do it steadily and do not use two functions at the same time, e.g., zooming and panning. Use the pause button if you have to move from one part of the office to another. Try shooting from behind the person looking from the side over the shoulder, which gives the user's perspective as they look at and point to their *Post-it*[®] notes.

After the interview: Thank the person for their time. (This is obvious, right?) Spend a few minutes after the interview reflecting upon what you heard and write down your overall impressions while they are still fresh.

The interviewer should identify which questions were actually used, how they changed and which new questions arose. The scribe should review his or her notes, then fill in any missing details. The observer should write notes and make observations that the others might have missed. The camera person must immediately set the red tab on the tape and label the tape case and tape (use the “original” stickers) with time, date, person interviewed, interviewing team, and setting. (See the “Video Tips” article for more details on videotaping interviews.)

Briefly review your predictions and identify what was interesting or surprising. How did the real setting contrast with your expectations?

Worksheet: Interview Questions

Interviewer: _____ Camera: _____

Scribe: _____ Observer: _____

User: _____ Date: _____

Job description: _____

Critical Incident with a *Post-it*® note: _____

Recalling a specific time: _____

Life cycle of a particular *Post-it*® note: _____

Title

Author

Location

Date

Interview

Topic

Name

Location

Date

Time