



Interviewing and Observing

For our initial project round you will be doing two basic kinds of need finding: exploratory interviews and observations.

We have connected you up in pairs with a person who has agreed to do an interview, and asked you to get in contact with them. During the coming week you will meet with them and conduct the interview.

In addition, we would like you to do some observations in the style of the shopping mall observations we did for the IDEO Saturday workshop. We will suggest some places. Do at least one observation, and more than two would be great if you have time. If you want to “divide and conquer” you each go to different ones.

Bring in your notes and artifacts from the interview and observations next Tuesday, January 22, for a session in which we will work with them.

Interviews

There are different kinds of settings for interviews and different kinds of purposes. We will be doing two: intercepts and exploratory interview. Others are discussed below.

Intercepts

Intercepts are what we did in the one-day workshop, so you have had some experience in doing them. You’ll do those as you do observations.

What: A brief question and answer session in the field

When: When you want quick and specific in-context information

How: The key is to be approachable to your subjects, and relate what they say to what you see.

Exploratory interview

This is the interview you will be doing with your assigned partner.

What: An informal discussion at a pre-arranged time and place with a potential user of designs you will be developing

When: When you want to gain empathy and deeper insight into the needs

How: The key is to develop rapport and hear stories that help you understand their lives.

What we are looking for in this interview is for you to get a feel for the lives of the people you interview and the way their lives are affected by mobility and mobility concerns. This includes their physical health, ability to do daily activities, desires, fears, and experiences. Unlike some interviews, you are not trying to get answers to a set of specific questions. It is more of an open-ended exploration around a theme. Questions should be open-ended, such as “What do you like to do?” and “How has



your life changed as you've gotten older", rather than specific questions, such as "Do your legs bother you?" or "How many flights of stairs can you walk up". Questions like the latter may well emerge in the context of their stories. Take note of them as well.

Abby has prepared a number of valuable suggestions about the interview. Be sure to read through them before you do the interview. They come from common sense but are all too easy to miss if you're not being conscious about the process.

Interviewing Older Adults – A Few Suggestions

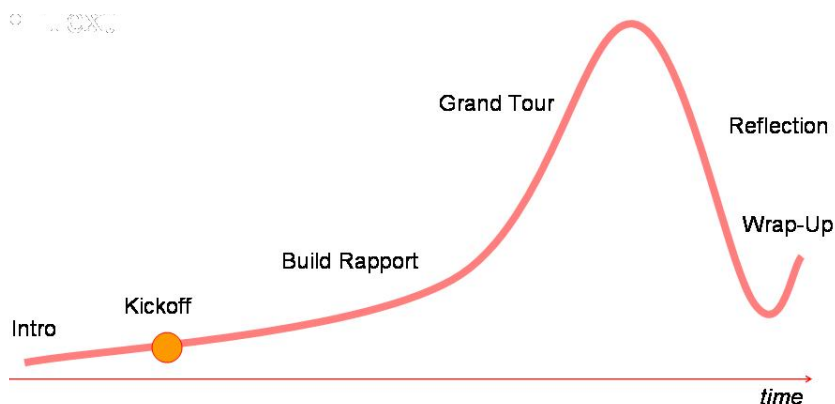
- Prior to the interview, prepare and write down questions of primary interest. Work out who is going to ask which questions ahead of time, to reduce confusion and increase efficiency.
- The day before the scheduled interview, call to re-confirm the day/time with the participant.
- Be punctual! (but patient if the participant is running late).
- Find a quiet, distraction-free, private place to talk, as much as possible.
- Start the interview by introducing/re-introducing yourselves, the general goal of the interview, and the planned amount of time it will take. Stress that this is a one-time visit (so as not to raise expectations of anything more.) Ask for any questions prior to beginning.
- Let the person know that you will be taking notes to ensure that you don't forget anything. Make sure that the person knows that what he/she tells you will be kept confidential (i.e., their name/identity will be protected by assigning them a code name, etc.).
- Prepare open-ended questions (that can't be answered by a simple 'yes' or 'no'), and begin with easy ones that are non-threatening/not overly personal. Speak clearly, slowly, and in a voice sufficient to be heard.
- Use verbal and non-verbal cues to convey empathy, support, and good listening skills. (These include making eye contact, not interrupting, smiling and nodding in support, and re-stating/paraphrasing participant comments to let them know that you are following and understand.)
- If the participant begins to ramble, run on, or get off track, gently bring them back to the topic at hand by acknowledging your interest in what they are saying but reminding them that unfortunately because of limited time you are going to need to move things along. (e.g., "Gee, that sounds interesting. I wish that we could hear more about that, but unfortunately because of our limited time together we're going to need to move to the next question.")
- If at any time you perceive that the participant is fading, fatigued, or needs to end the interview prematurely, thank them for their time and bring the interview to a close.



- If you perceive during the interview that something has put off, upset, or bothered the participant, gently bring this up with them (e.g., “Are you feeling okay about this?”). Apologize if necessary and go on to the next question, or if they prefer, bring the interview to a close, but the goal is to do so on a positive note. (You want to leave them smiling and feeling good about participating.)
- At the end of the interview, thank them for their time and ask if there is anything that they would like to ask you. (Be careful, though, to not promise them things such as seeing or visiting them again, etc.). *We have Stanford mugs that you can give them as you finish, saying that it is a token of our appreciation for their time.*
- Prepare a summary of the interview that can be shared efficiently with the class. Do this together, so you can cross-check each other’s interpretations and trigger each others’ memories. The sooner you do this after the interview, the better.

The interview cycle

Visually, the interview process might look like this:



(Thanks to Michael Barry for this model)

- We’ll show and discuss slides from PointForward that illustrate this process. They are available on the web site.

Working as a team

By having two interviewers you can be observers in action. Listen to what your partner is asking and think about where the interviewee is leading. Step in with your own question if things bog down (but don’t forget that often you get the best responses by letting a silence go on longer than feels comfortable). When your partner is focusing on the interviewee, you become the primary note taker.

Review the interview together afterwards while it is fresh in mind, and make more notes of what you recall. Having the other person’s memory and observations to bounce off of will let you capture much more.



Observation

What: Viewing users and their behavior in context

When: You want to see users in their element and learn about their experience

How: There are several methods

- “Deep hanging out” – spend time in the vicinity of the subjects
- Walk in the subjects shoes: assume the role of the subject
- Ask for a tour from an insider
- Paparazzi – observe and photograph anonymously
- Other – security cameras, head cameras for subjects, etc.

The most important thing about need finding in design thinking is that we look without knowing what we are looking for. We trust that our ability to define the problem will emerge during the need finding process.

Some Potential Places for Observation of Agile Aging

For this first round, we would like you to do some observations in the style of the shopping center trip we did in the IDEO workshop. There are a number of places where you might observe something valuable. They include:

- Lobbies and other public area of residences for older adults. Some of the ones in Palo Alto include:
 - Channing House
 - Webster House
 - Lytton Gardens
 - Stevenson House
 - Hyatt Residences
- Grocery stores and other places where older people go shopping, restaurants that appeal to an older crowd, ...
- Churches and synagogues, Activity centers such as YMCA, JCC,... *and many more...*

When you do your exploratory interview, ask your interviewees for places they know of where it would be good for you to observe. If you have older friends, families, or neighbors in the area, ask them too.

Some Observation Principles and Techniques (from d.school bootcamp)

PRINCIPLES

- Human Centered Design (Look to users for design inspiration.)

PURPOSE

- Uncover Latent Needs: Gaps in Use, Usability & Meaning (Look for surprises, differences between what people say they do and what they actually do.)
- Gain Empathy for Users (Discover the emotions that guide behaviors.)
- Look for Extreme Users (Users who are pushing the system may reveal needs before the mainstream.)



PROCESS

- Bring back Stories (specific) and Artifacts (photos, drawings quotes) that communicate your Insights.
After the observation phase, you will gather with your team to share findings and insights. Bias toward capturing your observations in ways that are visual, sharable & evocative.
- PHOTOS
Use photos to isolate points of interest & generate later discussion. Take as many as possible.
- SKETCHES
Sketches are a great way to interpret a scene, to create a broad representation or to call out specific details.
- QUOTES
Short quotations can be a great way to communicate the essence of a conversation with a user. Transfer to post-its.
- STORIES
Jot down notes as you speak with users in the field. Good stories are a tool for building empathy making meaning.
- RECORDINGS audio & video
Recordings of users expressing their needs are compelling. These recordings are good storytelling media in the long run.
- ARTIFACTS
Anything you can take with you from the location can be a good illustration of the cultural detail.

How do you know when you've got an Ah-Ha?

- You have the implicit insight
- You have uncovered a surprise or found what is missing
- You can explain why people do unusual things
- You can explain a contradiction
- In interviews, you know what the subject will say next
- You can tell a good story
- You want to tell your friends, significant other, and people on the train what you learned



More Kinds of Interviews and Observation Techniques (for future reference)

There are lots of flavors of interviews. You will end up doing more of these during the course, and some of the techniques may be useful for the initial interview as well. This was written up the d.school bootcamp crew for an exercise on “the coffee experience,” so the examples come from that. Think about the corresponding examples for agile aging.

Lead user interviews

What: Interviews with fanatics (the most rabid consumers of an experience)

When: You would like to see the future of usage, or understand an experience from the perspective of its most critical subject.

How: Beyond traditional interview structure, you should

- Look for the most extreme users (use your network, look for blogs owners, etc. to find people like the guy who is visiting every Starbucks in the world)
- Make contact, and state your interest in them and their views
- Ask questions that are more open ended and blunt “Why do you think people pay more for coffee now than they did in the past?” “What do you think we need to know?”
- Engage them in an ongoing way – lead users make great testers for your prototypes!

Expert interviews

What: Interviews with subjects who have domain expertise

When: You need to come up to speed on the context of your design quickly

How: Beyond traditional interview structure, you should

- Ask open ended questions that allow them to educate you. “I am a designer, so I don’t really understand coffee chemistry. As a food chemist, can you explain to me how coffee ‘works’?”
- Try to understand their role in the user’s experience. “If I come in to your store to get a coffee, what, as the barista, do you do?”
- Gather ideas for needs that experts may uniquely see. e.g. “What bothers you most about your job?”

Camera studies

What: Providing cameras to subject who document their experience

When: When you would like to understand a user’s experience by seeing it through their eyes

How: Steps

- Identify subjects
- Explain purpose of study
- Get permission to use images
- Provide cameras and instructions, eg:

“We would like to understand what a day in your life feels like. On a day of your choosing, take this camera with you everywhere you go. Take photos of people, places, things, and experiences that are important to you. Shoot the whole roll all in one day. When you are done, return the camera in the enclosed envelope. Thank you!”



Surveys

What: A series of carefully structured questions that can be

When: You would like to get many perspectives rapidly or quantify / test insights

How: Steps

- Identify screener for subjects
- Develop and sequence questions (see above rules)
- Include explanation of survey in survey instructions
- Provide progress updates through survey
- Ask at least one open ended question
- Test the survey before releasing it
- www.surveymonkey.com and other tools are very useful

History interview

What: An interview intended to understand a sequence of events

When: You would like to understand the historical context, or where subject behavior, feelings, or thoughts came from

How: After traditional early interview elements

- Establish subject - "What is your favorite beverage?"
- Signal interest - "How long has it been your favorite? Why?"
- Establish start - "What is your earliest memory of [beverage]?"
- Walk forward - "What happened next? Next? Next?"

Process mapping

What: A tool to understand the COMPLETE experience

When:

How: Start with the experience you are considering (e.g. buying coffee)

- From the user's point of view, mentally step back to the earliest stage of the process (e.g. thinking about coffee, or waking up, etc.)
- Step through every element of the process, recording it
- Analyze your map: what happens at each of these stages? Why? How do the stages relate? What opportunities do you see?

Laddering (or 5-why) interview

What: A method for driving to implicit causes based on asking why multiple times

When:

How: After traditional early interview elements

- Warn of your weird behavior: "Have you ever talked to a five year old? I am going to act like one and ask you why again and again. Even when you give a good answer, I will continue to ask you why. My goal is to understand why you do what you do at the deepest possible level."
- Focus on something important to the subject (where there actually is a why)
- Establish subject - "What is your favorite beverage?"
- Establish base interest - "What are three reasons why it is your favorite?"
- Dive into each reason - "You said [reason one] why is that important to you?"
- "Why?"
- "Why?"
- This is a difficult interview technique as subjects can rarely articulate why they do what they do - in fact, they are often unaware of their own motives
- Allow space and silence for subjects to answer the hard why questions
- NOTE: This technique can be used in a variety of ways. Toyota uses a process like this uncover the root causes of manufacturing problems.



Cultural context interview

What: An unfocused tool for understanding

When: You would like to formulate implicit needs based in part on the more general values of a subject

How: This interview requires a good amount of trust, so you may use this tool at the end of another type of interview. This interview is relatively unstructured, but there is a list of questions that we have found to be illuminating. Note the need to sequence the questions.

- Start with a statement of intent – “I’d like to get a sense of who you are and what you care about.”
- Where did you grow up?
- How did you like that?
- What was our family like?
- What are your favorite (books, movies, TV shows)? Why?
- Do you have any hobbies? What are they?
- What is most important to you?
- What do you wish for?
- What keeps you up at night?
- What are your fears?
- Note that the magic is in the follow up questions. Everywhere your subject displays enthusiasm, give them room to run. Ask lots of follow up questions, and go deep into the drivers of their enthusiasm.
- Analyze your findings – the seemingly disjointed pieces you gather in this interview can be combined with insight from other tools to form a great story.