

## Customer Interview Template

**PRINCIPLES: Human Centered Design.** *Look to users for design inspiration.*

Interviews are a means of **engaging** a user to gather information using either direct or indirect questioning techniques. **Direct** questioning techniques are focused on having the user speak about specific topics, while **indirect** questioning techniques are focused on getting the user to tell stories about various aspects of a topic. Both kinds of techniques are used together for a **deep** exploration of ideas so that the interviewer can develop **insights** about the user.

**PURPOSES: To Understand.** *Interviews are a technique to learn more about the user.*

Interviews develop value in several ways:

- **To uncover latent needs.** An interview can help identify gaps between the use, usability & meaning of an idea, object or experience for a user to reveal unmet needs.
- **To find surprises.** Interviews can find differences in who the people are and what they have stated they want and what these people actually do, and what they say they actually need.
- **To gain empathy for the user.** Interviews can help the designer discover the emotions that guide a user's behaviors.
- **To identify the type of user.** Interviews can help identify if a user is "extreme" or "mainstream". Extreme users are people who are pushing the system and may reveal unmet needs before the mainstream users do.

**MINDSETS: To Engage.** *Have a conversation rather than just ask questions.* In design thinking, interviews are a tool that allows you to engage with the user to hear about the successes and failures in people's everyday lives. Direct questioning tasks do help you gain facts; however, indirect questioning practices help you hear the stories behind these facts. Below are talking and listening suggestions:

Let the user do the talking:

- **Encourage Stories:** Whether or not the stories people tell are true, they reveal how the user thinks about the world. Stories reveal what people find normal, acceptable and believe to be true. A good interview should let the user elaborate on the answers similar to a conversation.
- **Look for inconsistencies:** Sometimes what people say and what they do are different. These inconsistencies often hide interesting insights. Interviewers need to ask about these inconsistencies during an interview.
- **Follow up with why questions:** Even when the interviewer thinks he or

she knows the answer, the interviewer needs to ask people why they say or do things. The answers might surprise the interviewer.

*Adapted from work done at Hasso Plattner Institute of Design at Stanford and Henry Ford Learning institute*  
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- **Listen to verbal and nonverbal cues:** Be aware of emotions and body language as a way of using the interview to build empathy for the user.

The interviewer does the listening:

- **Don't suggest answers:** Even if someone pauses before answering, don't help her by suggesting an answer. This can unintentionally get a person to say things that agree with the interviewer's expectations.
- **Ask questions neutrally:** "What do you think about this idea?" is a better question than "Don't you think this idea is great?" because the first question doesn't imply there is a right answer.
- **Don't be afraid of silence:** Interviewers often feel the need to ask another question when there is a pause. Sometimes if you allow there to be silence, a person will reflect on what they've just said and say something deeper.

### **RULES: To guide your behavior during interviews**

**Rule #1 Talk to them following a path** Hint: Have a beginning, a middle, and an end

*You need to introduce yourself, state your school, describe what you are doing, and ask if you can ask some questions. If the user says yes, then you can carefully and seriously ask your questions. Talk slow, be polite, and look the person in the eyes when speaking. If he or she doesn't understand you, calmly repeat your question. When you feel you have received enough answers, ask the user if they have any questions for you. When you are done be sure to thank the user for their time and say good bye with a smile!*

**Rule #2 Ask them open, not closed questions** Hint: Ask for descriptions

*An open ended question asks someone to provide you with a description. A closed question can be answered with one word or a simple yes or no. For example, "Can you remember what you ate yesterday?" can be answered with a "yes or no". If you ask, "Describe a meal you had yesterday..." will evoke richer information.*

**Rule #3 Have them tell you a story** Hint: Use follow up questions for more info

*After you have asked your open ended question and your user has provided an answer, ask a follow up question to get the user to talk more. You can ask for more information using "say, do, think, and feel" style questions. For example, "Did you **do** anything*

*different for this meal?” or “Did anyone **say** anything interesting during your meal?” can help tell you more about eating behaviors. To find out about emotions, you can ask “How did you **feel** about the meal?” or “What did you **think** about the meal?” Let the user talk as long as he or she likes and make sure you don’t talk over them or finish their sentences. This is a chance for the user to tell his or her story. Avoid the interview becoming an interrogation, instead allowing the user to tell you in the way he/she wants.*

**Rule #4 One interviewer talks, the others write** Hint: Work as a team

*You should work in teams so that one person asks questions, one person writes down what is being said, and another person can observe the user’s actions, behaviors, and personal characteristics. You need to include the date, time, and where you are doing the interview. You should ask or guess their age, record if they are a man or woman, and describe any other information about the person you are interviewing*

**Rough Interview Schedule/ “Path”** (duration and basic activities/question areas):

1. (5 minutes): Introduction and Icebreaker
2. (20 minutes): Question Period
3. (5 minutes): Final Thoughts and Question for Client

**Specific Questions** (order can be adjusted to maintain ‘natural’ conversation flow):

1. Can you describe to us what a typical day looks like for you? E.g going to the grocery store. Can you mention at which point time you would put on your sunglasses? For how long?
2. Have you ever tried using Transition Lenses in your glasses? If yes, describe what that experience was like and if they were helpful.
3. Can you describe/show us the different sunglasses you carry with you and describe the differences between them?
4. How many hours does the client stay outdoors VS indoors VS using electronic devices (“screens”)? Any needs for Blue Light lenses?
5. Can you describe to us what the weather does to what sunglasses you wear? For example, on cloudy days or other dark conditions, do you think you also need to wear sunglasses
6. Can you describe to us if there is any distress or adverse reaction to wearing glasses for a long time, such as sore eyes
7. Nearsightedness or farsightedness?
8. What would be your ideal solution to help replace all of the glasses that you usually

carry?

9. What shape of frames do you prefer? Rectangular glasses, Larger frames (2020 / 2022 styles), Circular glasses (look like Harry Potter)\_

10. \_ What colour of frames would you like?

11. \_ Are you colour blind or not? \_ \_

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