

## 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.

- **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.

*Adapted from work done at Hasso Plattner Institute of Design at Stanford and Henry Ford Learning institute*

## **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.*

**What we know about the client:**

- *Client: School of Engineering Design and Teaching Innovation (SEDTI)*
- *Passionate about Equity, Diversity, and Inclusion*
- *Head of School of Engineering Design and Teaching Innovation*
- *Trying to develop a library of useful EDI (Equity, Diversity and Inclusion) tools.*
- *They want to refine the ideas that they came up with and build the library of simulations.*

**What we don't know about the client:**

- *What is inspiring the client to create this immersive experience*
- *Their personal experience in regards to the matter at hand*

**Tools and methods we will use to interview the client:**

The interview will be conducted through a virtual meeting and these methods will be used:

- Note taking.
- Keeping track of body Language and tone of voice .
- Open ended questions.
- Contribution to the discussion (Not one-ended).

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

1. ( 3 minutes): **What was the inspiration behind the initiative (if comfortable of course)?**
2. ( 8 minutes):**What would you say " immersive" entails?**
3. ( 8 minutes): **Any specific themes or specific interactions or experiences you'd like to be included?**
4. ( 5 minutes): **How would you describe the desired outcome of the immersive experience?**
- 5.( 5 minutes): **Past experiences with products?**
- 6.( 1 minute): **Preferred method of communication?**

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

★ **What was the inspiration behind the initiative (if comfortable of course)?**

1. *Was it a personal experience? Or (friends/family)?*
2. *Was it anything specific? Or general?*

★ **What would you say “immersive” entails?**

1. *How do you imagine the experience to be? Passive story walkthrough? Interactive walkthrough? etc.*
2. *Would the experiences be linearly guided or would a more open interactive environment be better suited?*
3. *How would you say the effects of the shown problem are best conveyed?*
4. *Should there be replayability with multiple scenarios?*
5. *On a base level what would you want the scenario to look like?(Can you describe)?*

★ **Any specific themes or specific interactions or experiences you'd like to be included?**

1. *Certain narratives? Certain Issues? (Racism/Disabilities/Sexism..etc.) ?*
2. *Any certain aspects of an experience walkthrough?*
3. *How long should a playthrough be?*
4. *Who is going to use the tool/game?*
5. *Is there a number of interactions wanted within the tool, if so around how many? (What did you mean when you mentioned a library of simulations?)*

★ **Could you describe the desired outcome of the immersive experience?**

1. *Any certain messages that should be conveyed ? (Other than the stuff posted on maker repo)*
2. *Any feelings one should walk away with from the experience? (Other than the stuff posted on maker repo)*

★ **Past experiences with products?**

1. *Did you have the chance to view some of the projects in the past?*
2. *What were some things you did and did not like about them?*

★ **Preferred method of communication?**

1. *(Contact information, availability for questions)?*