EXPLORATION INTERVIEWS

Gain deeper insights into customer needs.

TIME

Approx. 2 – 4 hours (varies considerably, depending on the number of interviews and topic)

PARTICIPANTS

Ideally, a colleague who can document the interview for you, as well as interviewees

CRITICAL SUCCESS FACTORS

Meeting real users and experts, a core theme with different research questions

WHAT IS IT?

Ethnographic interviews are structured dialogs with customers to understand who they are and what is important to them. They are carried out in the user's natural environment and focus on subjective experiences, statements, and assessments. The objective is to gain a better understanding of customer behavior, motivation, and their everyday challenges and needs.

WHAT WILL IT GIVE ME?

- An in-depth understanding of the user and his or her motivations, thoughts, emotions, and needs
- A list of pain points and opportunities for current products and services
- Recorded written and visual information about users, like quotations, stories, and photos.

SUPPORTIVE METHODS

- User Map
- Day in the Life

Cheat sheet

INPUT

- Topic or main research question guiding your interviews

OUTPUT

Recorded written and visual information about users
in form of
- Quotes, e.g. little stories and concrete situations
- Insightful interpretations, e.g. surprises and contradic-
  tions
- General information about the user

OUTCOME

An understanding of your users which lead to areas
of opportunities.

RESOURCES NEEDED

Select the interviewees
- Flip chart or Metaplan board
- User Map template

Carry out the interview
- Notebook, pens and (cellphone) camera, possibly
  an audio recording device
- Questionnaire prepared under step 2 listing
  the key questions and topic to address.
- Any other documents required, such as consent
  forms etc.

KEY STEPS

1. PLAN AND PREPARE YOUR INTERVIEW

- Choose the relevant target groups and users you want
  to interview. Discuss how you can get access to them.
- Identify what you want to find out and where your can
  interview your user. Choose your interview style.
- Come up with a list of key questions you want to ask
  your user.
- Decide on your team's roles during the interview and
  on which resources to bring. Determine how to do
  the documentation.

2. CARRY OUT THE ETHNOGRAPHIC INTERVIEW

- Friendly welcome and introduction
  Build rapport, warm up with the interviewee and
  explain the goal of the research project.
- Context questions
  Understand the social dimension of the interview.

- High-level (descriptive) questions
  Ask the interviewee to describe you a typical day,
  experience or activity.
- Detailed (structural) questions
  Ask "What if…" and "What are your reasons for…"-questions
  to go deeper and understand the underlying motivations.
- Finish
  Thanks and let interviewees know what will happen
  with their feedback. Ask if they are available for testing
  interviews.

3. PREPARE YOUR NOTES FOR THE TEAM DEBRIEF

- Organize your transcripts. Write the golden nuggets on
  post-it notes for sharing within your team.

1. Plan and prepare your interview

INTERVIEW PARTNERS

CHOOSE YOUR INTERVIEW PARTNERS

First of all, you need to define who do you want to speak with. Use the user map template and put your challenge statement in the center. Brainstorm user groups that are directly and indirectly affected by the challenge. Create a diverse set of different user groups.

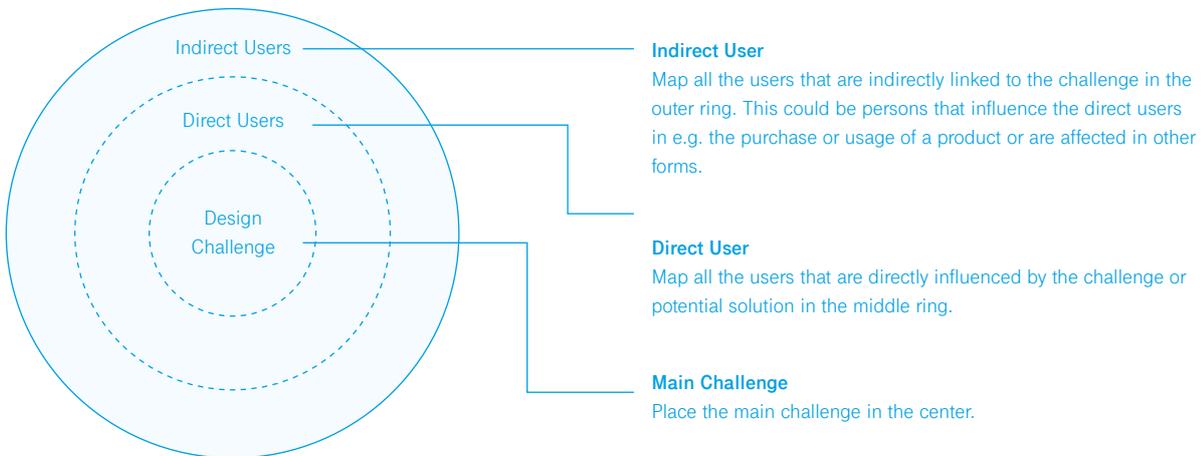Also think about including special user groups:
- Extreme users who have special needs or use cases, e.g. disabled users. Extreme users can also be non-users or past users.
- Lead users who are passionate about the topic or your brand.
- Analogue users who have the same problem in another category or industry.

Think about how you can get access to your user. You can recruit suitable users through your personal and professional network. If you can find access to one extreme user ask her if she can recommend you other possible interview partners (this is called snowball sampling).

NOTE

Checking if your target group is represented through an existing Telekom persona, may save you some time in defining the characteristics and finding the interview participants. Real users who represent the Telekom personas can be recruited for interviews via an agency.

>>> ask the Telekom Design Research Experts via design-thinking@telekom.de

Indirect User
Map all the users that are indirectly linked to the challenge in the outer ring. This could be persons that influence the direct users in e.g. the purchase or usage of a product or are affected in other forms.

Direct User
Map all the users that are directly influenced by the challenge or potential solution in the middle ring.

Main Challenge
Place the main challenge in the center.

USER MAP
The user map is a canvas to brainstorm and identify relevant user groups that should be interviewed.

INTERVIEW TYPE

CHOOSE YOUR INTERVIEW STYLE

Ask yourself which kind of answers you want from your user. The answers you are seeking determine the style of your exploration interview.

If you want personal thoughts and opinions on e.g. a delicate topic, an individual interview style suits your interests. This is also the perfect method for truly getting to know and understand your user's motivations, desires, mindset, behavior and lifestyle.
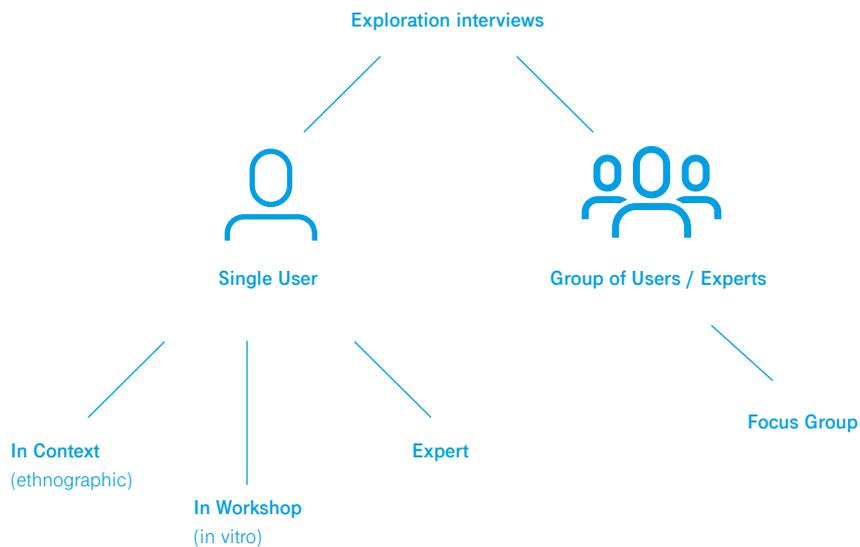
A focus group on the other hand which stimulates memories and experiences through interaction might lead to deeper information. Through a more natural conversation atmosphere than in a 1-on-1 interview, the group creates an effect of cascading stories and reflexion.

If you are looking particularly for insights about e.g. their daily working routine or common behaviors, try to meet the user in their environment, e.g. elderly home, T-shop. This type of interview is called ethnographic interview.

If you cannot meet your user in her personal environment, invite the user for an interview to your workshop or in a neutral space, e.g. café (in vitro interview).

If you want to get e.g. a better overview about common group patterns or a group of users, it can help to conduct an expert interview with a specialist.

**DIFFERENT TYPES OF
EXPLORATION INTERVIEWS**

Exploration interviews

Single User

Group of Users / Experts

In Context
(ethnographic)

In Workshop
(in vitro)

Expert

Focus Group

PREPARATION

PREPARE A QUESTIONNAIRE

List all key challenges and topics you'd like to explore in your interview. Come up with a list of key questions about whatever you need input for from your customers. Start with general and easy topics such as daily routine, product usage and experience. Then continue with detailed questions. Use open questions starting with why, how, where, etc.

Selecting the key themes to address and preparing an interview guide will help you to keep the interview focused.

In addition to the research questions ask yourself:
▪ How long will the interview last?
▪ Where will it take place?
▪ How can you make the interview situation as pleasant and natural as possible?

DECIDE ON ROLES, RESOURCES AND DOCUMENTATION

The perfect size for interviews is two to three people. Decide on who will be the lead interviewer who asks the questions, the note taker and who will be the observer.
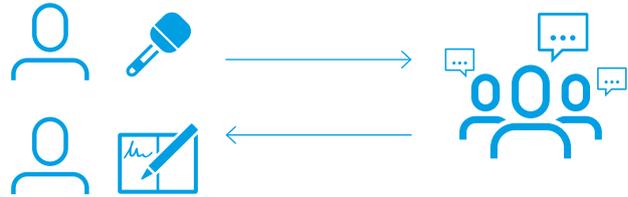
If you interview a single user on a delicate topic, a 1-on-1 interview style can be more suitable and leading to better research results.

Decide in your team how you will document the interviews. The best way to document interview is to record in words and visual information.

Focus on facts such as
▪ Quotes, e.g. little stories and concrete situations
▪ General information about the user

but also note down
▪ instant interpretations, e.g. things that surprise you or a contradictory to something else your interview partner said.

The observer should focus mainly on
▪ face expressions and body language
▪ instant interpretations concerning thoughts and feelings of the interview partner.

Note: The most valuable insights are often gleaned from thoughtless side notes taken during an interview.

Check the materials list and make sure you have the material needed for your interview. Decide on who will bring the material.

2. Carry out the exploration interview

CONDUCT THE INTERVIEW BY FOLLOWING THE FIVE STEPS:

1. Friendly welcome and introduction
Ethnographic interviews are characterized by a high degree of trust and empathy. As the interviewer, your goal is to ensure that the interviewed person feels comfortable and appreciated to be able to speak openly. Converse with them and make sure that they feel comfortable in the interview situation. Where possible, choose their own environment and context. Explain the goal of the project and answer any questions they may have.

2. Context questions
Start the interview with some questions about the interviewees background, such as job role, relevant main activities etc. This helps you to be more specific with your questions and understand the social dimension.

3. High-level (descriptive) questions
Ask the interviewee to describe you a typical day, experience or activity to get a general idea how the interviewee sees the world. Let the interviewee tell you the story. The nature and format of the interview should not be linear or rushed. Think of the interview as series of friendly conversations, in which you ask open-ended questions to help the interviewee share his experience.

4. Detailed (structural) questions
Ask "What if..." and "What are your reasons for..."-questions to go deeper and understand the underlying motivations. Follow the interview flow and use the prepared questions more as a rough guide rather than a checklist of questions. At the end of the interview explore more abstract feelings, emotions and thoughts. Let them reflect upon challenges & contradictions.
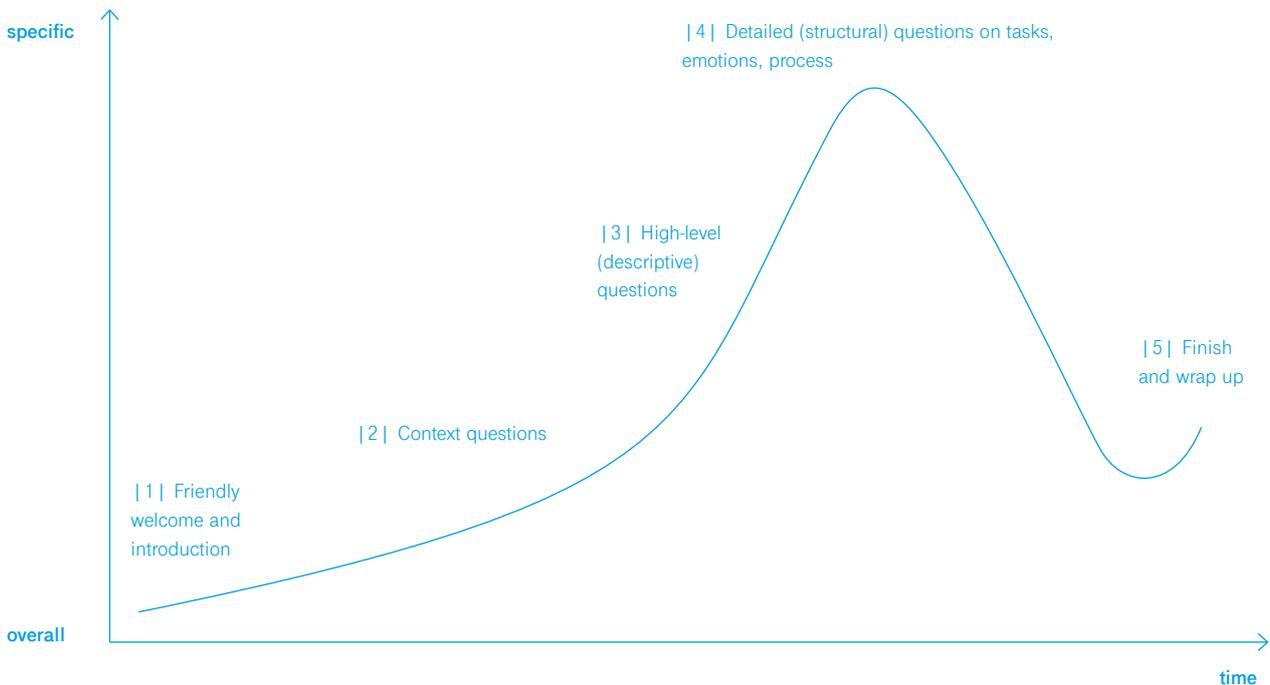
5. Finish
Thank your participant and explain what will happen with the provided feedback. Offer them to keep them in the loop, this also helps you to come back if you want to re-check an assumptions that you made during the interview.

PREPARE YOUR NOTES FOR THE TEAM DEBRIEF

Organize your transcripts. Write the golden nuggets on post-it notes for sharing within your team.

You can user color codes for different interview partners or for different types of information (e.g. quote and instant interpretation).

specific

|4| Detailed (structural) questions on tasks, emotions, process

|3| High-level (descriptive) questions

|5| Finish and wrap up

|2| Context questions

|1| Friendly welcome and introduction

overall

time

FLOW AND STEPS OF AN EXPLORATION INTERVIEW

Tips and tricks

Let the interviewee talk
Listen actively and try not to speak for more than 20 percent of the interview time.

Stay open, but focused
Your interview should be open enough for new, unprepared aspects. But make sure you get clear answers to your key questions. Ensure that the questions you ask are not redundant.

Pause
Pauses are important in an interview! Interviewees need time to reflect. Artificial time pressure can be inhibiting.

Express interest
Show that you are interested in what they are saying through verbal and non-verbal cues, even if you have already heard what the person is telling you.

Use open-ended questions
Do not ask leading questions, as you want to obtain genuine answers. Avoid closed questions requiring a simple "yes" or "no" response. Instead, use open questions that encourage your interviewee to interpret or evaluate.

Avoid using why-questions
Why-questions often sound judgemental. To understand the underlying motivations reformulate the question in: "What are your reasons for ...".

Ask for stories
Encourage the interviewee to tell stories, since stories are the key to everything.

Ask for use instead of meaning
Instead of asking for a meaning for a word or phrase, ask for an example. This will elicit more specific information.

Summarize the answer
Do not try to make your own interpretations. Repeat the answer or summarize the statement using the same words and ask for corrections.

Take notes
Take notes and write down memorable quotes. The most valuable insights are often gleaned from thoughtless side notes. You can also record the interview in order to better concentrate on the interview itself, or ask a colleague to take notes.

Observe
Minimize your presense and observe. Non-verbal behavior is important! Facial expressions and emotions can speak volumes.

Reflect continuously
Frequent reflection ("Why is that the case?") will help you to gain valuable insights. Thoughts can be understood more quickly, and you will receive more in-depth, detailed explanations.

Look out for say-do gaps
Watch out for inconsistencies! What people say and do and how they react may differ considerably. Ask participants to show you the things they interact with (objects, spaces, tools). That gives you a more realistic view of the situation.

Planning and resources

TELEKOM SOURCES

- User Map Template
- Questionnaire & Notes Template

EXTERNAL SOURCES

- Needfinding: Design Research and Planning (2013) by Dev Patnaik

- Interviewing Users: How to Uncover Compelling Insights (2013) by Steve Portigal