




## Interviewing Techniques for Site Visits

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### What is a site visit?

- Method for gathering usability data about users, tasks, and environment
- Asking questions of users and watching them work/live in their workplace/homes


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### Why conduct a site visit?

- Reveal all of the real users and tasks
- Discover questions that users ask
- Investigate known or suspected problems
- Reveal true structure and flow of work
- Collect artifacts
- Establish usability criteria


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### Brainstorm a List of Questions

- What do you really need to know to design a better product (confirm critical design assumptions)?
- Are there any facts about users or tasks that are in dispute?
- What aspects of your product design are dependent on the user's environment?


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### Group and Prioritize Questions

- Groups make it easier for you to jump around during an interview
- Small groups may indicate that you need to do some additional brainstorming
- You may not be able to answer all of your questions, so highlight the most critical ones

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### Determine Task Scenarios

- Figure out what you need to see to answer your questions
- Task scenarios can be real or staged
- You may not always be able to have these before the site visit

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## Prepare the User

- Introductions
  - Chit-chat v. Get-down-to-business
- Establish a collaborative tone
  - You are not the expert, the user is
  - You are not an evaluator of the user's performance
  - You are trying to learn from the users to make their future work easier
- Explain the process and all of the players
- Ensure confidentiality
- Verify the time available for the interview

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## Start Off With a Simple Survey

- Surveys help get the information flow started
  - Provides an effective way to gather background information quickly
  - Allows you to compare responses from multiple users
- Keep surveys brief and simple

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## Watch Real Work, If Possible

- Get users working on real work in their usual work location
- You may have to control the pacing and ask the user to move to the next part of the process to control the schedule
- You may need to use your prepared task scenarios

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## Base Discussions on Artifacts

- Use end results to prompt the users to explain how they were created
  - Who created X?
  - What would you do with X?
  - How would you go about creating X?
- Keeps the users focused on tasks
- Works even if they cannot re-create the artifact for you while you watch

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## Get Them To Think Aloud

- Ask users to think-aloud as they work
  - Can you tell me what you're trying to do?
  - Could you tell me what you're thinking?
  - What are you feeling right now?
- Listen and watch
- Don't become the trainer/expert
- Remain neutral to comments

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## Allow Users To Tell Their Own Story

- Ask open-ended questions
  - Why do you think X happened?
  - What happens when you do X?
  - What just happened?
- Give the user time to respond
- Use your voice and body language to encourage them to talk
- Listen more than you talk

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## Help Them Stay on Track

- Summarize what they said to clarify and encourage them to continue
  - So first you do this and then what?
  - You said you expected to see X, why is that?
- Redirect lengthy, unrelated discussions
  - I'm sorry to interrupt you, but we have about X minutes left and I have about X questions to ask. Do you mind if we move on to the next question?

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## Request Specific Examples

- Get users to be specific by asking them to provide examples or war stories
  - What is an example of the impact of X?
  - Can you tell me about another time that X happened? How was it similar/different?

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## Discuss Typical Problems

- Ask them about typical problems
  - Do you ever have any problems doing X?
  - What would you do if X happened?
  - Where do you go if you have questions?
  - If you could change one thing about the current way you do it, what would it be?

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## Pay Attention To Non-Verbal Cues

- Watch for non-verbal behavior and listen to the tone of voice for clues
- Listen for subtle criticisms and suggestions
- Remember that some users try to please the observer by providing what they think the observer wants to see and hear
- Don't forget that you send non-verbal cues too

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## Remain Flexible

- Each interview will set its own direction
  - You may not be able to ask all of your questions
  - You may ask many questions not on your list
- Follow the most promising trail rather than stick rigidly to a list of questions

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## Capture User Terminology

- Make notes of unique terminology used during the interview
- Reflect the user's terminology during the interview
- Ask for definitions and examples

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## Identify Tasks and Workflow

- Keep track of tasks performed
  - Frequency
  - Importance
  - Variations
  - Difficulty
- Clarify the relationship and flow of tasks
- Look for interruptions to the user's flow

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## Record Your Source Data

- Use predefined data collection sheets
- Helps to have a note-taker/observer and an interviewer
- Can use video or audio recording
- Separate facts and problems from your own opinions, ideas, or solutions

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## Collect Artifacts

- Keep an eye out for homemade job aids or other cheat sheets for using the tool
- Ask for copies of their input and output such as planning worksheets or reports
- Look for environmental impacts on their work and take pictures

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## Tie Up Loose Ends

- Make sure to tie up loose ends before you leave the site
- Ask for opinions and suggestions at the end of the visit
  - If you could change any aspect of this product, what would you change?
- Ask "Is there anything I forgot to ask?"

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## End With a Post-Interview Survey

- Measure satisfaction, ease of use, interest at the end of the interview using a survey
- Surveys can be completed orally or in print

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## Conclusion

- The real benefit of usability testing is not the result of an individual test but the on-going collection of knowledge about users
- Exposure to users makes us better designers
- Participating in site visits helps us learn to ask the right questions

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## Recommended Books

- *User and Task Analysis for Interface Design*. JoAnn T. Hackos and Janice C. Redish. John Wiley and Sons, 1998.
- *Contextual Design: Defining Customer-Centered Systems*. Hugh Beyer and Karen Holtzblatt. Morgan Kaufmann Publishers, 1998.
- *The Usability Engineering Cycle*. Deborah J. Mayhew. Morgan Kaufmann Publishers, 1999.