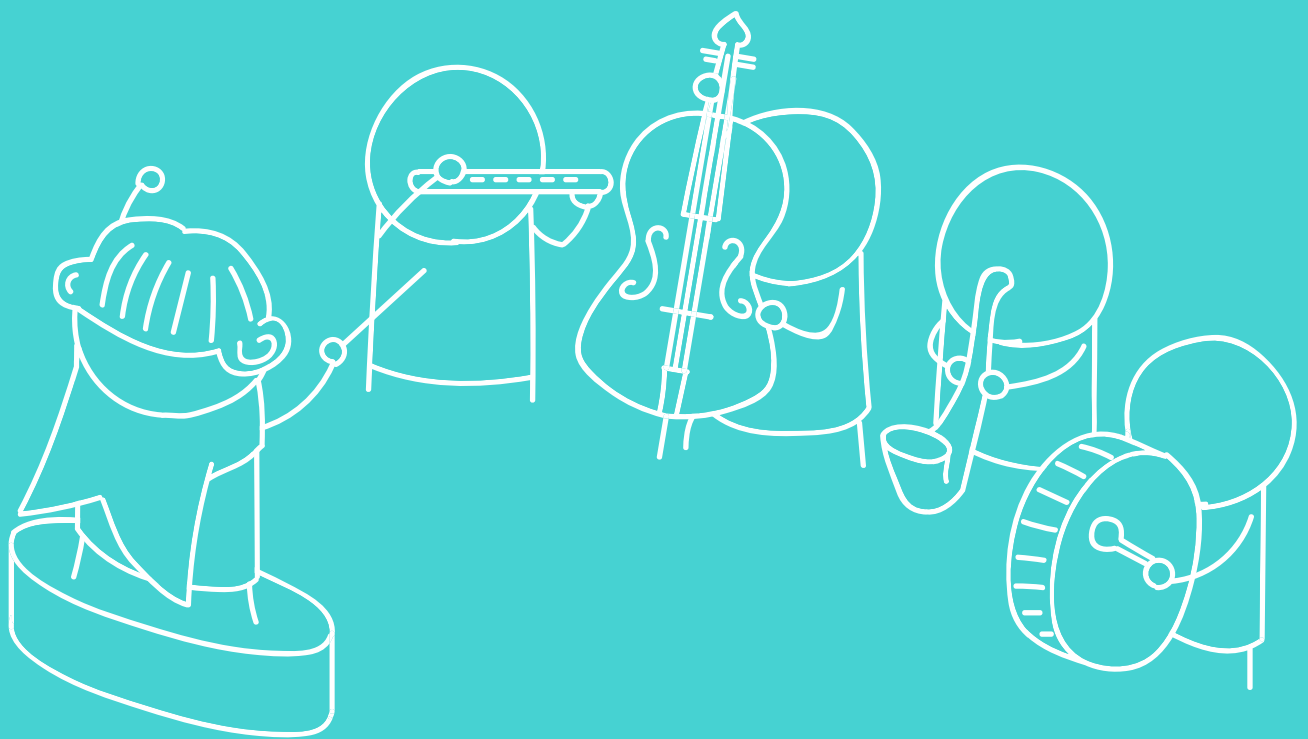


How to conduct great user interviews

A collection of tips and tricks from UX professionals



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1

Conducting excellent interviews through solid preparation

Jenn Downs and Jacklyn Cohen

Working as a UX team of one is a challenging and sometimes tiresome undertaking. We're hopeful this lightweight framework will help you conduct UX research in an efficient and cost-effective way while reducing stressful moments during testing. A lot of UXers spend all of their time focusing on getting to the solution, but neglect the time and thinking involved in preparation. **Taking the time to prepare is paramount so that you're confident, and your mind is free and clear to focus on gathering information from your participant.** Check these items off your preparation list to help make your project more successful.

First things first: begin your testing day by taking care of yourself. Eat a healthy meal (no Pop-Tarts!), stay hydrated, bring snacks, and do some yoga or exercise to help wake up your mind. Consider your time as well as your participant's — are you working across multiple timezones? Are you a morning person? If not, don't schedule early sessions! If you get hungry around lunchtime, make sure you schedule time to eat. Research days can be draining, so taking care of yourself is key.

Before the test

Participants and logistics

Before testing begins, focus on the participants and logistics. What is the problem? Who is impacted by it? How do you contact your participants for the project? Write your questions using the same language as your participants to make it easier to understand each other. For the purpose of this article, we'll assume you've already got an understanding of the problem, who you need to speak with and your questions are written appropriately.

Logistics and checklists

If you spend ten minutes of a thirty minute session working out problems that could mostly have been avoided by preparation, you can't learn as much; not to mention it frustrates both you and your participant. You can avoid this frustration by using checklists to reduce the amount of things you need to hold in your memory, allowing your brain to focus on the conversation. Your preparation checklist might include:

- Be in the room and ready to go at least 10 minutes early
- Charge your computer and any devices
- Have multiple pens and plenty of paper
- Grab your headphones
- Have a water bottle nearby in case you get hoarse
- Minimize interruptions by putting a sign on the door — and close the door
- Print an extra copy of your discussion guide

Example Checklist, Introduction and Consent Form

- ☐ Print guide
- ☐ Bring two pens
- ☐ Dial in on phone *Host Code 80X0000
- ☐ Log in to webex *<https://company.webex.com/join/4400XX0>

Thank you for meeting with me. I'm grateful for your time and the opportunity to learn about how you work and how you use our product.

When we get into talking about our product, I usually ask people to share their screen and walk me through how they use things rather than just explaining in words. Would you be ok with doing that? ☐

- ☐ Do you mind if I record the audio?
- ☐ Start quicktime recording

To get started, I want to ask a couple of questions to help me understand your day to day. Then we'll jump into [*Product Name*] in general, and we'll end with talking about [*feature*].

Do you have any questions before we start?

Preparing for the discussion

You can prepare for running the test with scripts, guides and **a deep understanding of the research goals and objectives**. Once you've got your script or guide written and finalized, print them out in advance.

When it comes to writing the discussion guide for your interview, make sure that you include the following:

- Research goals and objectives
 - › this is super important because it helps you get on track when your conversation strays
- Logistics
 - › how you're collecting artifacts
 - › how you're recording the interview
 - › how long the interview will take
 - › how many people you're speaking with
 - › where the research is being conducted
 - › any idiosyncrasies in the prototype, product or wireframe (If you built the prototype, you'll know it well. If you didn't, you need to not only know the path you want people to take, but all the possible paths.)

Putting this content front and center on the first page of your guide/script is great because you can hand it to someone and they can immediately understand the basic details of the study.

Recruiting

When you're pitching research to a client, always ask for more participants than you need. Working as a consultant, I've learned that people who agree to the interview can't always make it on time and I have to scramble to find additional folks that fit the profile I'm looking for. I recommend that you establish relationships with a few usability recruitment companies so you can get some help in a pinch.

[Recruiting for UX projects](#) is always a struggle. I recommend recruiting double the participants you need whenever possible because people will reschedule, cancel or no-show. When you're working within a budget on a deadline, you need to be able to fill those gaps quickly. Taking the time to prepare for the possibility of cancellations will save you loads of frustration toward the end of your study.

I typically have someone who is familiar with the potential participants

send an email to them introducing me and the project. It's really important that you, as the researcher, are copied on these so you can follow up with those that don't schedule right away. Here's an example recruiting email I would have my client send:

Example Recruiting Email

Hi xxx,

We're conducting research on [*1-2 sentences explaining your study*]. Would you be willing to participate in a [*timeframe: 30-minute, 45-minute*] [*type of interview: phone call, video chat, in-person interview*] with a customer researcher on our staff? If so, please select a time using the link below. No preparation needed.

Choose an appointment slot that is convenient for you here: [*link to scheduling tool*]

Expect to hear from [*researcher name*] in the next few days to follow up with your appointment. [*Additional introduction context*]

Thanks so much,
xxx

Please note: these customer feedback interviews are for informational purposes only to the xxx Customer Experience team. We respect your privacy and will not share your name or information with any external organizations. [*Only include this line if it's true. If you're actually going to share it with a third party for data analysis or anything like that, remove or alter this.*]

Scheduling

The best tool I've used for scheduling interviews as a lone researcher is [ScheduleOnce](#). It provides a two-way sync with my Google Calendar, which is fantastic for double checking availability during projects. I give myself two weeks per 10-person study, set up my availability in the software and ScheduleOnce provides a great experience for

participants booking with me. They choose their timezone, they're presented with the X-minute interview slots and they choose a time that's convenient for them. Then, we both get a calendar invitation with all of the important data included — simple! This tool has increased my participation rate tremendously and I believe it's because people have the ability to choose convenient times as well reschedule without the back and forth of checking calendars.

Rehearsing

The benefits of rehearsal should not be underestimated. This is the best way to make sure your script flows naturally as well as identify any areas where technology can trip you up. Running through it with a co-worker can also shine a light on places where real customers may experience problems.

I always conduct two dry runs before meeting with a participant for a live test. I run the first with a coworker who is unfamiliar with the product to clean up my questions and fix any prototype issues. I run the second with a stakeholder so they get a feel for the test and can note anything that might be missing or incorrect in the task list.

During the test

For user interviews, it's often helpful to write out some assumptions and questions to track with each participant as the interview is being conducted. This helps you keep your focus on the goals. While it's good to let our users elaborate in interviews so we learn about behaviors and motivations we might not have been anticipating, we always need to bring the conversation back around to the problem we're studying or trying to solve.

- What is the user's reaction when they see the offer has expired?
- Do they understand that they are seeing tomorrow's offer and not the sold out offer?
- Do they feel betrayed or like they are in a bait and switch situation?
- What else are they experiencing that we might not have thought of?

For usability testing, I like to keep a matrix on hand. This helps me quickly note and analyze each participant's thoughts and actions.

Matrix 1

In this example, I was testing an upload process with many uploading options. Instead of jotting down every action as they happened during the test, I wrote out possible paths and actions in a matrix with room to note any deviations or comments.

...Go ahead and create a gallery for your client and upload some photos.

[Goals: Do they know to go to the gallery tab? What options do they choose when uploading photos?]

Expected Path: Gallery Tab > New Gallery > Upload Photos
1st Try | 2nd Try | 3rd Try | More | Fail (Gave Up)

Uploading Photos: DRAG | BROWSE

Any other issues/comments:

On Upload Screen

Do they use the additional Upload Options? YES | NO

On Upload Screen

Do they use the Watermark Options? YES | NO

Matrix 2

In this example, I'm aggregating the data during my test. For each participant, I'll place a tick under the perceived reaction or the action taken, thus reducing the time it takes to analyze the results.

Imagine you've received an email alerting you to an amazing daily coupon. Go ahead and get that coupon!

Goals

What is their reaction to landing on the expired page?

- Positive
- Neutral
- Negative

Did they click on "previous coupon" on expired page?

Yes | No

Recording

If you're acting as a lone researcher, consider recording all of your research studies. Sometimes it's difficult to keep track of the conversation, take notes and follow through on answers all at once. Having the recording to go back to will help you fill in gaps in your notes and identify areas where additional followup is needed. It will also keep you from feeling overwhelmed if you missed something, because you can always go back and listen again. If you're using a webcam, do your due diligence and investigate multiple methods of screen and audio recording so you've got a backup solution. If your research is taking place over the phone make sure that you've got more than one way to record the audio. I can tell you from personal experience, having a back up dictation device has helped me more than once.

Wrapping up...

Conducting user interviews and usability testing on your own requires the ability to handle logistics, active listening skills, knowing where and when to follow up, deep concentration, getting your participant through the testing artifact and excellent note taking. If you're new to this, you may even feel a bit nervous. Now that you have this framework, you can focus on what's most important - having an organic conversation with your participant!



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Jenn is a UX designer at Deluxe and adores the web and what it can do for the world. Currently, Jenn is a mentor for Code for America and invented the slightly awkward, yet helpful, Laptop Hugging Method for remote mobile testing.



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2

Before you even open your mouth

Gregg Bernstein

*The phone wouldn't stop ringing, and customers kept streaming in the door. The front desk was a hotbed of activity, and Laura (*name changed for privacy) was multitasking with aplomb.*

As part of a study during my time as research manager at [MailChimp](#), I visited a handful of local customers from various industries. That day, I sat alongside Laura at the fitness studio where she “did a bit of everything.” I was there to observe and ask questions along the way, but the questions proved to be far less enlightening than what I observed.

Laura managed the email marketing duties at the fitness studio, but that was clearly not her primary responsibility. Within a few minutes of my arrival, I watched as Laura checked in arriving studio members, provided information to prospective members, answered the phone, clocked in employees, replied to emails, refilled a water dispenser, and worked on a marketing email. Each task interrupted the next as Laura truly did a bit of everything.

In survey responses and on calls, customers had described themselves as “doing everything,” or something akin to a “jack of all trades.” But until watching Laura work, I hadn't truly understood what this could mean. I was there to research how customers use MailChimp, but MailChimp was one of hundreds of things competing for my customers'

attention.

This simple insight changed how we approached our product research. We shifted emphasis from the product to the people, and leaned heavily on their ecosystems of teammates, apps, and habits. It's a practice I continue as I study writers, editors, and audiences for [Vox Media](#).

After countless interviews, I've learned that before you even open your mouth, you can gather hundreds of research insights via detailed attention to the context around your interview participant. It's normal to want to jump right into a conversation, but the small details add up to big tells. Here's where to start:

The mindset

As much as possible, **observe and listen** to everything happening around you. (If it helps, pretend you're Sherlock Holmes, piecing together the mystery of your interview participant.) Make note of everything you can as soon as possible — I record snap observations in Evernote and take photos.

The sights

The office was gigantic — it felt as though we walked a mile to get to the conference room. Everyone worked out in the open, yet the space felt peaceful. Some colleagues spoke softly to each other in front of their computers, while others donned headphones and worked independently. As we passed folks in the hallways, everyone said hello and smiled.

What does work look like for your participant? Capture the details that allow you to paint a picture like that above. These details ground your research and make it both relatable and readable to those who weren't along for the ride.

Note what work looks like — in cubicles, in an open space, behind closed doors. Can you deduce anything by who sits where, or how

they sit? You can often determine your participant's level of authority by where she or he sits. This small detail could signify who in an organization is authorized to make decisions (like whether or not to buy or use your product!).

The sounds

*The music was loud, but not overly so. All five of the workers in the office were able to hold conversations over the music, and often **about** the music. Which made sense, as this was a public relations firm for musicians and record labels.*

What you hear indicates a great deal about company culture and work habits. These are crucial bits of information that help you determine how (or if) your product fits in. How does the volume of conversation or music impact concentration and collaboration? Is the space overrun with loud chatter, ping pong tournaments, and incessant music? Are colleagues concentrating on assignments or quietly discussing work?

In the case of the public relations firm above, everyone collaborated — an important observation when considering product features and who might use them!

The tech

The wait for the page to load seemed interminable. The time between each click and a response from the website stretched far longer than was comfortable. I was watching how this customer used our software, yet I was distracted by the latency of the hardware. This organization ran on donated equipment, and while the computer wasn't new, it worked.

It's quite easy to become accustomed to the latest and greatest, to the point that we forget that not everyone works on shiny new Apple MacBooks. Sometimes a visit with a customer also serves as a reminder — the monitors and computer systems we've long since forgotten may be the backbone for your participant's organization.

Take note of the devices your participant uses, and not just their computers. Is this office phone-centric? Do you see a (gasp) fax machine? Details about devices and technology provide you and your team with additional context about your participant's day-to-day.



The atmosphere

Scott Pioli was the recently-hired general manager for the Kansas City Chiefs, a team in the National Football League. One day, Pioli saw a candy bar wrapper on the floor in the stairway of the team's headquarters. He was furious and called a meeting. To Pioli, littering (or ignoring litter) at work signified a real problem with workplace respect and morale.

A piece of trash on the ground might mean nothing, or it could be a sign of a larger morale issue. Look for clues embedded within the office atmosphere. Does the workplace seem tidy? Are the restrooms maintained? Is the kitchen a mess? Organizations are comprised of people, and how those people treat their workplace speaks volumes.

A practice of observing

The sights and sounds you capture add color, depth, and detail to your interview, which can be used to effectively design and market the right products to the right audience. It's a practice that top companies like [Ikea](#) and [Lego](#) perform to great success; both companies have incorporated home visits and observations into their respective research arsenals to refine their product lines and how they display said products.

By observing and documenting everything, you're able to flesh out the interview with all-important details that ground your findings in context.



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Gregg Bernstein is an accomplished user and product researcher. He spends his days listening, thinking, collaborating, analyzing, writing, and then listening some more — mostly for [Vox Media](#). He also speaks around the world about his work at conferences (UX2016 Copenhagen, WebExpo Prague, Web á Québec, Giant Conference), and for such companies as Etsy, EA Games, Fullstory, and more.

He built an innovative and influential research practice over his four years at MailChimp, and taught design, branding, and typography for university students. In a previous life, he designed for clients in the music and advertising industries.

Gregg earned his MFA in Graphic Design from the Savannah College of Art & Design, where he focused on user experience research and design. He resides with his family in Athens, Georgia. In his spare time, he runs early and often.

3

Tips for facilitating remote and “mixed” interviews

Chris Poteet

Conducting user research seems on the surface to be pretty easy. However, like anything in this world, doing it well is extremely difficult. There are so many factors you must balance when performing the research itself. It's not enough that actually facilitating the research is challenging, but sometimes the biggest hurdle is choosing the right method and format for your study from the beginning.

The “gold standard” for generative user research is contextual inquiry. In this approach we can get both attitudinal and behavioral insights, and we can get these insights with the bonus of being in the user's context. However, oftentimes we're on projects where doing this type of research exclusively is impractical for many reasons including cost, time, and geographical dispersion. So, how can we maximize our research investment in these scenarios? This is where remote user research fits like a glove, and why it's grown so much over the past decade.

Understanding different interview formats

I recently was conducting exploratory user research for a multi-billion-dollar company that had thousands of employees scattered across the country. It was simply impractical to travel to many different sites and meet with different business representatives. Instead of spending days

traveling, it was clear remote research was the solution to ensure that these people were heard and considered in our solution.

The challenge is that we can't facilitate remote research the same way that we can in-person sessions. Even though we can have similar scripts, goals, and approaches, we would make an enormous oversight if we treated them the same way.

Before I get into my tips, I want to distinguish different types of generative, remote research. The first we can call "exclusively remote." This is where all the participants in the session are not co-located. This is the most common type of remote user research, and it's also the easier of the two to facilitate. The other, less common format we can call "mixed remote and onsite." This is a variation where you may have a single session but be in the room with an interviewee and have another interviewee on the phone. You may choose this format if you have individuals you want to interact with together, but they're not in the same geographical region. For the project mentioned above, we used both of these methods to maximize our reach.

Now, I'll share my tips for prepping and running your remote and mixed user interviews:

Be as prepared as you can be

Preparing for a remote user research session is very similar to the way you would for an onsite session. However, now you have the added risk of technology impeding your success, and I can personally attest to this being something that can derail your progress. Here are a few things you want to keep in mind as you prepare for your remote session:

- Be sensitive toward cultural differences like you would in any user research. It can be challenging, and you may have to be mindful of various cultural considerations in one session.
- Although it's tempting to invite more team members to your remote session, consider how this can impact your interviewee in areas like social desirability bias. It's still best to have one facilitator and one note taker as you would for an onsite

interview. The preference is to speak to one interviewee at a time, but I certainly wouldn't go beyond 2-3 at a maximum. In a mixed interview there are obviously more than one interviewees, and I would still have no more than 3 interviewees at maximum (aim to have more of them in person if possible).

- If you're an external consultant, always use your client's reliable conference lines and screen sharing technologies to avoid frustrating your participants.
- Remember to plan on being in a quiet area with solid bandwidth. Don't try to facilitate a remote user interview from Starbucks using Skype.
- Feel free to expand your interview script a bit more than you would with an onsite interview. The reason for this is that people tend to be terser when not in the same physical location. You may have time for more questions.

Tips for better facilitation

After you've prepped for your session as best you can, the next major consideration is running it. It's still best to have several of the same guidelines you have for onsite interviews such as an interview time that's not much longer than an hour, and minimizing the number of participants. There are some things you should keep in mind when doing the session that can greatly impact your ability to be successful and glean great insights.

The hardest part of being remote is that you will probably miss a lot of non-verbal communication, and this is often a major influencer in how you move through the session. You certainly can enable a webcam, but in my personal experience and opinion it's often more of a nuisance than a welcome addition (and it can contribute to significant bandwidth consumption). It takes practice to listen more for tone and verbal cues than relying on body language. One example is to listen for changes in inflection that can tell you the interviewee is confused or is perhaps unsure of their answer. Over time you'll be able to sense how the interviewee feels based on their answers, pace, tone, and changes in inflection.

The second major challenge is rapport building, which is often considered highly desirable to get the best insights from an interviewee. Someone can feel much more comfortable seeing the interviewer and feeling their warmth. When doing remote interviews, you don't have that luxury. In my own opinion, an interviewer should avoid trying to artificially create rapport by sharing experiences. However, it can be helpful before you begin the interview to have some soft questions to make the interviewee feel more comfortable about the session.

During your session, keep the following tips in mind:

- Don't be afraid of silence. In fact, it can be a helpful tool to stop yourself from talking over the top of someone. When your interviewee has finished speaking, count two long seconds in your head, take a breath, and then start talking. Sometimes your interviewee may just be thinking and isn't ready to move on.
- If you've got a remote screen sharing tool, use it. It's not as good as seeing the complete environment of your interviewee, but if there's something you wish the interviewee to demonstrate you'll be able to see it.
- Record the session as you would the audio for an onsite session. You won't regret it later if you lose your notes or have a tech mishap.
- If you happen to have more than one interviewee in a single session, be sure to call them by name and repeat the question for each participant. Most likely, the person needs to hear the question repeated after listening to another person talk for a while.
- Establish a cadence between interviewees (if you have multiple) by switching up the order in which you ask the interviewees.
- Lastly, allow time and space for the interviewees to talk with one another to open up further insights. You'd be surprised at the amount of information you can uncover from listening to your participants having a simple discussion.

Conducting remote, generative user research can be extremely challenging, but when you take the necessary time to prepare and facilitate well it can allow you access to many more people than you would otherwise have in-person. Mixing onsite and remote interviews is often a recipe for success and can ensure your solution is as user-centered as possible.



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4

How to gather data and influence recommendations

Rachael Winterling

Organizations conduct user interviews to gather qualitative data about a service or a product. To make recommendations and changes within an organization, data has proven to be a critical component. Organizations don't want a "he said," "she said," or "I think" to influence a change in an organization; they want qualitative and quantitative data to support a change that will benefit their users. An interview is usually a one-on-one interaction between an interviewer (researcher) and an interviewee (participant) to collect user opinions, desires, and experiences. The goal of a study incorporating user interviews is to improve the effectiveness, functionality, and desirability of a product/service. The role of the interviewer/researcher is vital to a study's success within an organization; they are responsible for gathering influential qualitative data, compiling and consolidating the data, transforming the data, producing recommendations, and getting organizational buy-in.

Gathering influential qualitative data

The most effective type of interview is semi-structured interviews, where the researcher has predefined questions, but then inquiries further depending on the participant's response. It's the researcher's responsibility to squeeze out every piece of information about the product/service in each user interview; this is why the semi-structured

interviews are beneficial to research, the researcher must know how to probe the participant after a response.

Participants will provide more qualitative data when he or she feels comfortable. To increase user comfortability, the interview should take place in an environment most individuals associate with his/her normal surroundings. This means that the participant needs to be in a comfortable, inviting setting, which the researcher is responsible for providing. A comfortable environment has “homey” features such as comfortable seating, natural light or soft lighting, plants, colors, etc. Interviews can take place in an open environment like a coffee shop if a one-on-one setting is not available. The interview should not take place in a sterile uninviting environment. To make a participant more comfortable in the interview, the researcher should introduce themselves, smile often, sit beside the interviewee, and make the interview feel more like a conversation than an interrogation. During the interview, the researcher should remind participants that negative comments at times are the most helpful; participants can enter an interview nervous or think they know what the researcher wants to hear. Sometimes, a participant will never become fully comfortable in the interview, which is okay, the researcher is still gathering and influential data.

Compiling and consolidating qualitative data

After the cycle of user interviews are completed, it is time to compile the qualitative data and transform it into a visual form. Before transforming data, identifying patterns resulting from the compiled data needs to occur. Identifying patterns in user interviews is the one of the most important roles of the researcher in a study using the interview methodology. Without patterns, a researcher will not produce valid recommendations.

As the researcher analyzes the interviews, he/she will complete a needs assessment to encompass all the interviews. Needs assessments allow the researcher to determine user needs with a product/service based on the opinions and experiences shared in the interviews. Even if several participants share different experiences to detail an issue with a product/service, the researcher can analyze the

experiences and produce a recommendation that would resolve or improve the users' identified issue. In addition, patterns will develop for each predefined question in the semi-structured interviews. To collect and organize this data, the researcher needs to highlight the individual responses per predefined question. The researcher then can consolidate the responses from all the participants per question that allows the compiled qualitative data to represent as a statistic. For example, five of the six participants commented that they had issues locating the contact information for a service. Consolidating the data to represent a statistic is critical when transforming the data into a visual.

Transforming qualitative data

Transforming the compiled data into a visual such as an infographic helps contingents understand the significance of the gathered qualitative data. Using data visualization to present findings and recommendations of user interviews makes the data aesthetically pleasing and readable for novice to expert audience members. Additionally, the transformed data enhances the accumulated data into like groups that the researcher can manipulate to support recommendations and changes. Contingents want statistics to support a change in an organization, which is technically impossible to provide with qualitative data produced from user interviews because qualitative data is not measurable like quantitative data. To make the user interviews measureable the researcher should consolidate responses per question to represent a finding or recommendation as a statistic. The numbers alongside the finding/recommendation can translate into infographics. The infographics used to display the qualitative data can be as simple as a table or bar chart.

Influencing recommendations within an organization

Getting buy-in and support to make a change to a product/service in an organization can be like pulling teeth. In every organization there is a colleague that does not like change or disagrees with the proposed changes, which makes the researcher job difficult and sometimes unbearable. On the other hand, the role of the researcher in user

interviews is rewarding because they gather user input, analyze results, and produce recommendations/findings to support beneficial changes. The recommendations that a researcher produces based off of user interviews will improve the effectiveness, functionality, and desirability of a product/service which effects an organization in positive manner. To gain the support in an organization, the researcher must guide contingents through the study design and provide data visualizations that are readable to support changes.



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5

Top tips for successful user interviews

Natalie Kerschner

In my role as a senior user experience specialist at Bank of New Zealand, I've conducted many user interviews to find out more about our customers and how they interact with our products. Interviews can be a lot of hard work, and as such, need a lot of preparation before you get started. Over my time in the industry, I've created a big list of tips that I find help to make user interviews as successful as possible.

Asking questions and giving tasks

1. Ask open questions. If you can answer it with a yes or no, reformat the question. Use the five W's: who, what, where, when, and why, when writing your questions.
2. Keep questions short and only ask one question at a time.
3. Be quiet before and after asking questions to allow the participant to process the question or add more feedback. Count to five before speaking!
4. Don't agree or disagree with the participant. Confirmations lead the participants, so don't give them any feedback during the session.
5. Ask why. Even when you think you know the answer, ask people

why they do or say things. The answers will sometimes surprise you.

6. Ask questions neutrally. We are looking for information, not meaningless validation.
7. Don't interrupt the participant's train of thought during a task. Stay quiet except for asking what they are thinking.
8. Don't suggest answers to your questions. This can unintentionally get people to agree with your expectations.
9. Avoid talking about yourself, it's not about you!
10. Ask specific questions, not general ones. For example, ask about a specific instance or occurrence, such as "Tell me about the last time you..."
11. Ask questions that get people telling stories. as they will tell you how they think about a task. For example, "Tell me about the last time you did a transfer in internet banking."
12. Look for inconsistencies. Sometimes what people say and what they do are different. These inconsistencies often hide some interesting insights.

Note taking

13. It is impossible to engage a participant and take detailed notes at the same time. Taking notes means you miss observing the participant doing the next step of the task. It also makes you look inattentive, it uses closed body language, and it's just rude. Hosts don't take notes!
14. Your observers take notes or record the session and take notes later.
15. Observers don't talk. Observers should be forgotten by the participant. The observers can ask questions only at the end of the session.

Body language

16. Your body language needs to be open, interested and approachable. Don't cross your arms or legs. Smile and give good eye contact when giving a task and when the person is talking to you.
17. Avoid barriers between you and the participant — don't hold onto a notepad, glass or any object while you are interviewing etc. You want to show open hands.
18. Be mindful of personal space, especially if you need to do something on the laptop. Move it in front of you, don't lean over people.
19. Show your interest in the participant, lean slightly forward when they are speaking, mimic their gestures and summarize what they have said back to them to get validation of what you observed.
20. Watch the participant's body language and be aware of their emotional state. A participant being uncomfortable with a situation is OK — being in distress or angry is not.

Empathize with the participant

21. If you're interviewing the participant in a place that's not their office, keep in mind that they're coming into a foreign environment and will most likely be nervous or apprehensive.
22. If it's hosted at your own workplace, remember that you know your own office environment, but your participants don't. Coming into an environment and situation like this can be daunting and intimidating for a lot of people. Even if we have done 100 user interviews and see it as 'just another task' we need to keep in mind that it's the participant's first time and they most likely don't know what to expect.

Key points to remember:

- 23. Count to five before speaking.
- 24. Ask “what are you thinking?” a lot.
- 25. Watch the user during the session.
- 26. Answer questions with questions — leave answers to the end of the session
- 27. If a participant is lost and/or getting frustrated move on to the next scenario.



Natalie Kerschner

Senior user experience specialist, Bank of New Zealand

[@BrambleRose_Nat](https://twitter.com/BrambleRose_Nat)

Natalie is a UX activist, and currently a senior user experience specialist at Bank of New Zealand, who has spent the last 20 years actively fighting for the user in Australia and NZ. She's passionate about enabling every person, no matter their role, to not only get involved with UX activities but empowering them to take ownership of it!

6

Mini tips from the Optimal Workshop Community

One tactic we use when understanding a day in the life of a user is to ask them to walk through a very climactic/critical moment or situation they have to deal with. People like to discuss drama. At every moment leading up to a dramatic moment, you can probe deep into every step/ action and find rich areas for discussion or opportunities for a solution.

Phil Balagtas - [@neshacom1](#)

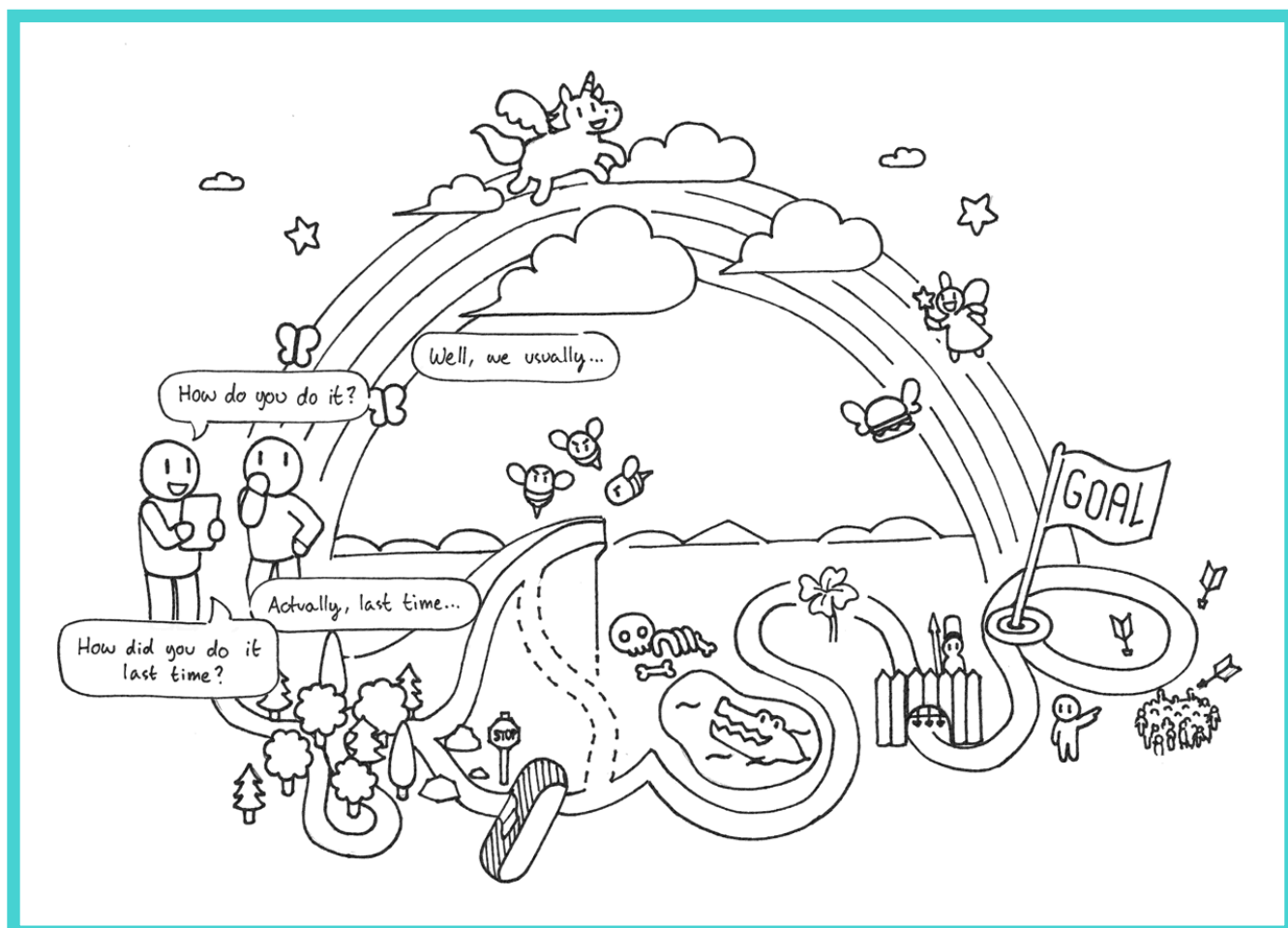
I usually try to get at least 10 people for a single study. The first five people will shine light on the major usability issues, the rest of them are great for data and edge cases.

Jenn Downs - [@beparticular](#)

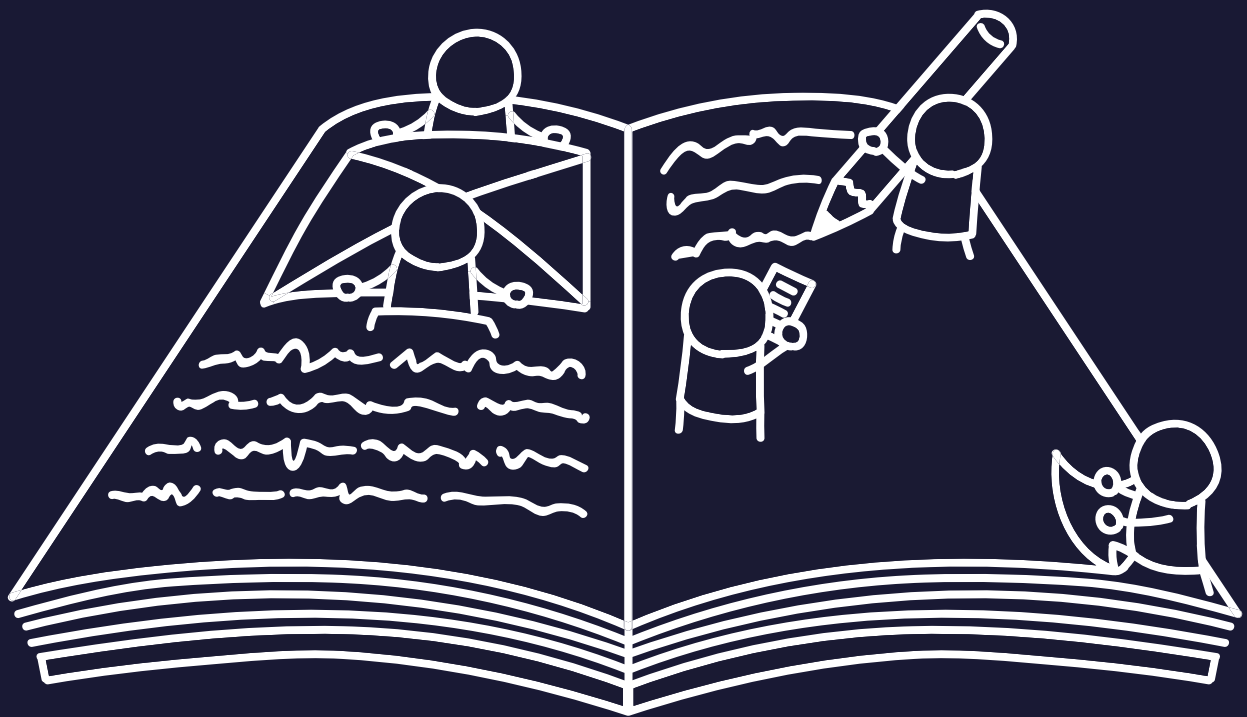
I ask this question in every user interview: “If you had a magic wand and could solve one problem in your job or daily activity, what would it be?”, or “If you were to leave your job today and start a new company, what would it be?” This exposes where there’s a particular interest or significant pain point.

Phil Balagtas - [@neshacom1](#)

My tip is a real timesaver! I turned on the seconds on my computer's clock. When I do a user interview or usability session I record it with a simple screen recorder. For each note I take, I also jot down the minute and the second. After the session this makes any search in the recording so much faster — I only need to look for that specific timestamp in the screen recording. On a Mac you can turn on seconds in System Preferences; on Windows you can do this through third party apps, e.g., Atomic Alarm Clock.



Zsombor Varnagy - Toth [@uxisallaround](https://twitter.com/uxisallaround)



Spread the knowledge and help your community!

Want to share your expertise? Do you love to teach others about your processes? Or maybe you've got an opinion on a particular topic and want to share it with the world?

At Optimal Workshop, we love helping all the researchers and designers in our community. Whether it's providing advice, support, or even bouncing ideas with some of our users, we try to help share the knowledge so people can test at their best.

We also love hearing about all the work that our customers do through different kinds of content.

If you'd like to contribute your ideas for content to help enlighten other researchers and designers, we'd love to hear it.

Get in touch with us to discuss how you can help researchers the world over. In return, we'll give you attribution to all your social media accounts, and promote it across our site and social media channels. Don't forget that awesome feeling you'll get knowing you're helping others in your community too!

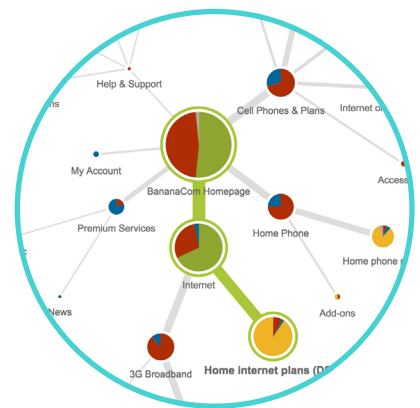
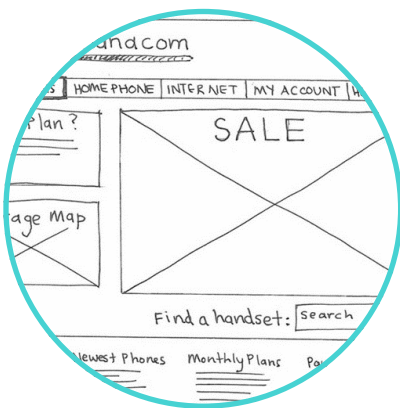
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