

— RESEARCH GUIDE

Introduction

The research phase is all about developing empathy for the people you are designing something for. Your aim is to understand their thoughts, emotions, and motivations so that you can determine how to create meaningful innovations for them.

Only if you understand the choices that your customers make and the behaviors they engage in can you identify their needs and design a solution to meet those needs.

In the following video you can find a great example of how important qualitative research is for designing valuable solutions:

<https://bit.ly/2usdYka>

There are different ways to collect this information such as observing processes or conducting systematic desktop research, market analyses, studies or observing technological trends. In order to get a 360° view of the problem, we recommend a combination of different methods.

Qualitative interviews focus on developing an understanding for the person you are interviewing and gaining meaningful and actionable insights. This is the reason why we want to focus on qualitative interviews in the following. This research guide will help you plan, structure and conduct your interviews in order to gain valuable insights.

Define the Interview Setup

- What is the basic framework and what are the guidelines for your Research phase? What do you want to find out and what do you need to know to develop your design challenge?
- Develop a list of questions as a basis for the interview. The questions will help you structure conversations, build a relationship and encourage your interview partner to tell stories and share insights.

Define Participants

- Who are the stakeholders you would like to interview and why? What are the characteristics of this target group? Define questions to help you identify the right group of people.
- Define the criteria such as interest, age, role in the company, that characterize your potential stakeholder group.
- Where do you find those people?
- Plan ahead to make sure you find appointments to speak to the most important people.

Define Your Research Methods

For qualitative interviews, you will need to clarify the type of interview that you would like to conduct, e.g.:

- Individual Interview
- Group Interview
- Self-documentation

You will learn more about the individual interview types in the following sections.

Define Your Interview Approach

- Conduct interviews in teams of two - one notetaker and one interviewer.

This way, one can focus on the conversation and the other can document all the collected information as well as non-verbal cues, emotions, quotes and more.

- Try to meet your interview partners in their working environment - this has proven to be most beneficial because they feel more comfortable and are more willing to open up. In addition, you might gain valuable insights from observing the interviewees in their usual working environment and might be able to collect some artifacts.
- Put yourself in the role of the person you are talking to in order to understand their needs, pains etc.
- Develop a set of questions to structure the interviews.



Question Types

Utilizing different question types helps you to build a relationship with your interview partner and to provide room for a conversation to develop.

Open/Non-Structured Question

- Answer can be freely phrased
- Suitable for opening or engrossing in conversation, motivating, encouraging
- There is a danger of going off topic/losing focus
- Encourages the interviewee to tell stories

"What are your thoughts on your company culture?"

Reflective Question

- Aims to dive deeper into a topic that has previously been discussed
- Can be useful to regain focus in the conversation or identify meaningful insights

"Let's return to communication within your team - what other thoughts do you have on the matter?"

Directing Question

- Guides conversation back to the topic and helps to regain focus

"That is an interesting point but shouldn't we return to the original topic?"

Closed/Structured/Decision Question

- Answer can only be yes or no
- Quick, targeted collection of information, conversation won't go off track
- Can be used to find out target group and clarify comments of the interviewee
- Can help structure the conversation but should be used sparingly

"Do you like working in your current position?"

Confrontational Question

- Meant to verify/scrutinize a previous statement
- Can help identify and dissipate contradictions
- It should be made clear that the aim of this question is to better understand, not test, the interviewee

"Earlier you said you liked working here but you also mentioned that you are not happy with the company culture. Could you please elaborate?"

Probing question

- Aims to receive more detailed information on a given issue
- Good for gaining clarification to ensure you have the whole story and that you understand it thoroughly
- Shows interest in needs and desires and helps avoid misunderstandings

- Should be used sparingly so the interviewee won't feel like being put on the spot too much

"What exactly do you mean by 'too much manual work'?"

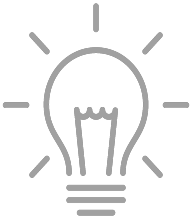
Going into the Field

Interview Structure

Now that you have prepared everything for the interview in advance, it is time to actually conduct your field research.

The typical phases of an interview are displayed in the following figure:

1	<p>Introduce yourself - role, history, responsibility, affiliation to the company</p> <p>Thank interviewee for participating and ask if you can take photos/ videos during the interviews and collect artifacts (e.g. payment receipts, print outs etc.).</p> <p>Introduction of interviewee - role, responsibility, which software/tool is used, what does a typical day look like, where is the work done primarily, whom does he/she interact with</p>
2	Introduction of the project – intention / reason to conduct an interview
3	Technical details & start the conversation - what kind of interview, no wrong answers, build empathy
4	Introductory questions Allow conversation, collect examples and fields of interest from the work routine - ask about details
5	More specific questions more details
6	Summarize results and clarify comments, if something is unclear. Ask your interviewee for validation and / or additional comments. Allow your interview partner to add something. Thank your interview partner for his / her time and ask about their interest to be informed about the ongoings of your project. It could be valuable to re- invite your interview partner during Test Phase or to let them review the insights of your interviews.

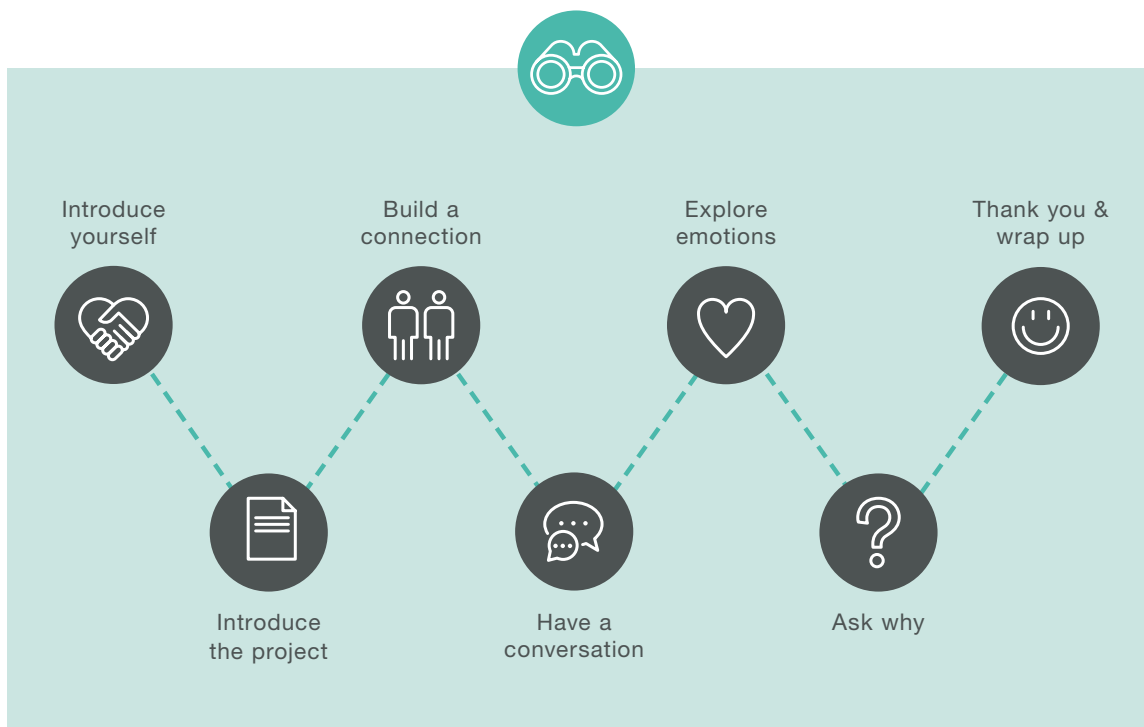


Some „final“ recommendations for your interview

- Keep in mind to always **ask open questions**. It gives the interviewee the chance to tell valuable stories. You can use more specific questions towards the end of the interview in order to clarify statements.
- **Ask why**. Even when you think you know the answer, ask people why they do or say things. This will give you the chance to really get to the core of the reason why your interviewee acts in a specific way.
- **Never say “usually” when asking a question**. Instead, ask about a specific instance or occurrence, such as “tell me about the last time you _____.”
- **Encourage stories**. Stories reveal how people think about the world.
- **Look for inconsistencies**. Sometimes what people say and what they do are different. These inconsistencies often hide interesting insights.
- **Pay attention to nonverbal cues**. Be aware of body language and emotions.
- **Don’t be afraid of silence**. Interviewers often feel the need to ask another question when there is a pause. If you allow for silence, a person can reflect on what they’ve just said and may reveal something deeper.
- **Don’t suggest answers to your questions**. Even if they pause before answering, don’t help them by suggesting an answer. This can unintentionally get people to say things that agree with your expectations.
- **Ask questions neutrally**. “What do you think about buying gifts for your spouse?” is better question than “Don’t you think shopping is great?” because the first question doesn’t imply that there is a right answer.
- **Don’t ask binary questions**. Binary questions can be answered in a word; you want to host a conversation built upon stories.
- **Make sure you’re prepared to capture**. Always interview in pairs. If this is not possible, you should use a voice recorder
- **Ask about missing topics**. Write down those things that are important for interview partner but have not been covered during the interview.
- **Ask for examples**. Ask your interviewee for artifacts that you can take with you as examples (e.g. screenshots, reports, websites etc.)

Post Interview Tasks:

Not everyone in your project team will be able to join you for the interview. This is why we want to share a detailed experience in the form of storytelling afterwards. In order to keep valuable details and comments in mind, highlight your most important insights right after the interview. You can add drawings or comments and bring artifacts if necessary.



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