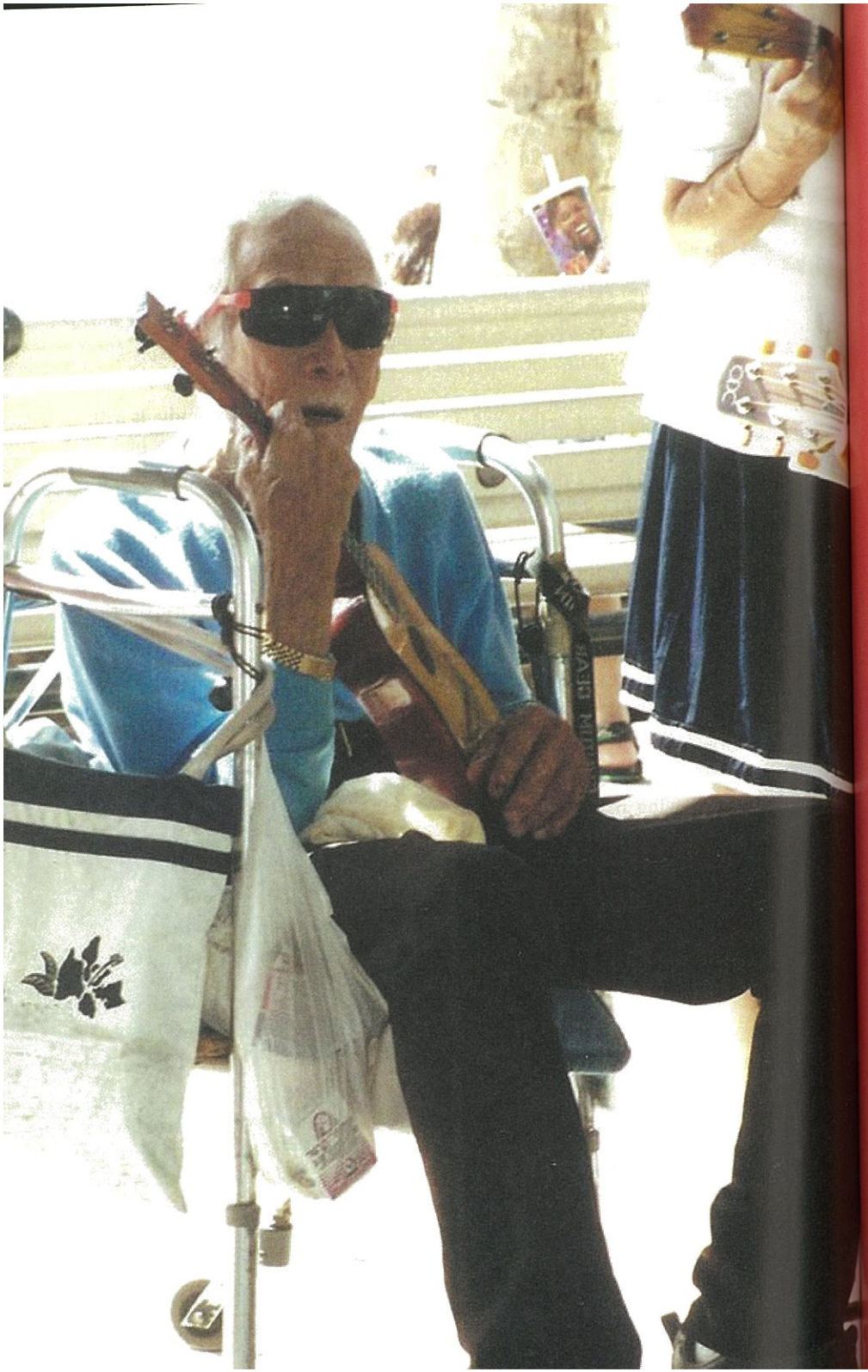

CHAPTER 7

Documenting the Interview

On one level, documentation is how you capture the definitive, fully detailed record of the interview (the "data"). On another level, it's how you, as the interviewer, make the ah-has and other important take-aways stick. While doing this, you have to stay engaged with the participant. Beyond that, documentation also bleeds into the sense making and storytelling that follow fieldwork.

Taking Notes

Although you might be tempted to try, you simply can't catch everything by taking notes. Typical handwriting is about 30 words per minute, and a great typist can do 60 wpm. Audio books are at least 100 wpm (and likely closer to 150 wpm). But people speak less clearly—and more quickly—than in an audio book. The cold math tells us it's just not possible to get everything down. Add the high cognitive load of leading an interview (as I talked about in the previous chapter), and you're done for. As transcriptionist Jo Ann Wall puts it, "It can be a challenge to listen purposefully in order to determine matters of importance and screen out extraneous information."

You do need to get *everything*. In the moment, you will miss details, misconstrue intent, or mishear a word. It's important to have an accurate version of the interview to go back to. The bottom line is that you should be recording your interviews—something I talk more about in more detail later in this chapter.

While I prefer to focus entirely on my interaction with the participant, some people find that taking notes helps them filter, synthesize, and ultimately better remember what is being discussed. The act of writing notes helps them process what is happening. They come away from the interview with pages and pages of handwritten rough notes. If you do this, remember that you must maintain eye contact while writing. Don't rely too heavily on asking your participants to wait while you catch up with what they've said. Worse still, you don't want to evoke the clichéd therapist who is bent into her notebook, muttering "mmm-hmm" and never looks up. By the same token, avoid overly signaling what you are interested in by scribbling furiously in response to certain types of input or response.

If, like me, you don't benefit from the act of note taking, you can assign this task to another researcher who joins you (or even a third party who is simply tasked with documentation). As you include other forms of documentation, you can easily become overwhelmed with devices and tasks outside leading the interview itself, so consider what can be assigned to a supporting interviewer.

As mentioned in the previous chapter, you can also take notes about what you want to remember during the interview, as a way to manage the expanding tree of the interview, as well as jot down topics you want to come back to.

NOTE (MIS)INTERPRETATIONS IN THE MOMENT

In one interview, I asked a participant, "If you and your wife own one iPod, how do you determine who is going to use it?" He responded, "Well, for commuting, it's either the iPod or the New Yorker." Two different scenarios are likely—1. She takes the iPod on the train, and he drives the car, a New Yorker, or 2. Whoever takes the iPod gets to listen to music, and the spouse gets to read the most recent issue of the *New Yorker* magazine. I didn't get to ask a clarification question, and it wasn't until I went back to the video that it was clear that he was referring to the magazine. In that same session, the participant, talking about iPods and design told us, "Well, when you do that, it looks more Zen. It actually looks like the competition" and another participant added, "Yes, it's like he says, very Zen, very Japanese, very spiritual." But that's not what the first participant meant by "Zen." He was referring to another MP3 player that was around at the time, called the Creative Zen. Misinterpretations in the moment are inevitable, so you need proper documentation to resolve it later.

Typing vs. Writing Your Notes

Many people can type faster than they can write. Typed notes can easily be shared electronically, and no one has to read your handwriting or interpret your spelling errors. However, taking notes on a computer creates other challenges. Do you have sufficient battery power or will you have to plug in? Can you type without clackety-clacking? What if you move around in the environment? Can you quickly move your laptop and still type on whatever surface is at hand? Can you continue to appear engaged even as you glance back and forth at the screen? Although this is also an issue when writing notes by hand, breaking eye contact to look at a screen can appear to be more rude (as participants wonder if you are checking email), while the screen itself can be more distracting for you.

Tablets and smartphones offer an alternative: although you won't be seen hiding behind the screen or lid, looking at a mobile device during the interview can be even more fraught with faux pas. It's not impossible to work around this issue, but simply showing up and using your smartphone as if you were in a meeting or on a date isn't going to cut it. Throw in the lower typing speeds, and you're limited in what you can do with these.

It's a good bet that interviewers who use note taking to help remember the interview are doing some kinesthetic learning; perhaps that effect isn't quite as strong when typing. If your goal is to juice your own memory, stick with writing. If you want roughs of the interview that can be shared (and you can keep your device interactions on the down-low), then type. And if you live for the moment, set it all aside and just focus on your interactions with your participant. Regardless, make sure that you are recording the entire interview using audio or video, as I discuss later in this chapter.

NOTE **LIVESCRIBE SMARTPEN**

LiveScribe makes something called a *smartpen*, which is a pen that records both audio and handwritten text (using special paper). After an interview, you can play back the audio from a certain portion of the interview by tapping on the relevant spot in your notes. Researchers who like taking notes find it generally unobtrusive and effective. Since I'm not an active notetaker, it's probably not a solution for me, but ethnographer Tricia Wang documents her evolving experience with her LiveScribe at **http://rfld.me/ZunZGi**.

The Notetaker's Voice

When taking notes, you should be descriptive, not interpretive. If Larry tells you he has worked 14 hours a day for the last 10 years, your notes should read "Worked 14 hrs/day for 10 years," not "Larry is a workaholic." If it's crucial to capture your interpretations, be sure to separate them from your observations, using capitalization or some other visual cue, such as "IS LARRY A WORKAHOLIC?" At this stage of rough notes, it's easy to lose track of what you were told versus the conclusions you made, so take care in how you document the two.

Audio Recording the Interview

An audio recording will capture all the verbal interactions between you and your participants. Of course, you can't see the demonstrations or exercises. Something like "I'd probably put this one with that one because they're kinda the same" might be hard to interpret later if you don't remember which items were being discussed. Although you can facilitate the discussion for the benefit of the audio recording (narrating what the participant is doing, like "So you would put the blue prototype in the same group as the orange prototype?"), it can feel unnatural. You shouldn't be treating the documentation as more important than the interpersonal interaction.

Depending on the environment, you can probably get away with a simple digital audio recorder. They are small and hold hours and hours of audio. Some background noise—especially clattering dishes and background music—can appear more prominent in the recording than you experience it, so perform some tests. Be aware of how loud you and your participant will sound in the final recording.

You might want to add an external mic to your audio recorder; think about whether it will allow you to move around the environment and whether it will pick up audio from multiple directions (at the very least, there's you and your respondent). Especially for the audio-tech newbie, I don't recommend a body microphone—everyone will have to be mic'd, and often a new participant will join spontaneously, different mics need to be mixed, and so on. The biggest concern is that attaching a body microphone is an intimate act that needs to happen at the beginning of the interview. When your relationship with the participant is at its most vulnerable, they will need to—with your guidance—attach a small device to their clothing, near their face. This is a delicate interaction that doesn't seem necessary if you can be satisfied with the audio quality.

You can also use a recording app in your smartphone, but test it first. Does your phone have enough capacity? What happens if a call comes in? Will your batteries last? And are you able to easily monitor the recording status of the app? There's nothing worse than realizing that your recording device has not actually been recording for the past half hour!

TIP **TRANSCRIBING YOUR AUDIO FILES**

You can get transcripts of your audio files (or even of the audio track of your video files). There are many transcription services that will take digital files via FTP (as they may be too large to email) and email back Word documents a few days later. Most services can remove "ummm..." and other hesitations and repeated words. This is called a "clean verbatim" transcript. I prefer to have those bits and pieces included because they help make the transcription come alive, revealing the personality of the respondent as well as illustrating the thinking process that goes into answering questions. I think this sort of human metadata is helpful in interpretation and analysis.

Costs for transcription depend on the total number of voices (how many interviewers and how many participants) as well as other typical factors like turnaround time, but you can expect to pay between $1.50 to $2.00 per minute.

How to Get Video as Good as Your Insights

by Ted Frank

Ted Frank is a storyteller with Backstories Studio. He has been in marketing for over 20 years and in consumer insights and strategy for more than 10.

FIGURE 7.1
Ted Frank, Storyteller, Backstories Studio

As a company that has created hundreds of videos for research and strategy firms, Backstories Studio has seen too many examples of stellar research work become unusable because of poor video or sound quality. And it breaks our hearts. What's more, for some clients, the video deliverable is often the only way they see your insights. So it often becomes the way they evaluate you as well.

Here are some tips to get high-quality video, even if you have only five minutes to set up and have never been to film school:

- **Respondent placement:** Where you place your respondents is the biggest key to getting good quality. Pick a space that is quiet and bright enough to see the color of your respondent's eyes. And unless it's important to the project, select a place where the background does not distract from your respondent.
- **Light:** People tend to look best when light comes from the side and slightly in front of them (up to a 45° angle). A window works great in the daytime. Lights will work at night. Don't place your respondents with the window behind them, or they will appear dark. Lights shining down will light them, but they will appear older because of the shadows those lights create. Lighting them from the front will also work, but they can end up looking like an episode of *Cops*, and if light is in their eyes, it will make it difficult for them to see you. See Figure 7.2 for an optimal setup.
- **Sound:** In research, sound quality is often even more important than picture quality, especially if you're picking clips by what your respondents say. Where you place your microphone is everything. It's just like real life: People sound intimate when they're close to you and can be hard to hear when they're across the street. Shotgun mics work well for groups if you can point them at the person speaking. Because that's difficult, though, a second mic in the center of the group will save you. A lot of researchers get scared when they see that some of these mics can cost $400. However, if you rely on your camera mic alone, you'll end up paying that same money in editing costs to reduce the room noise. And your clip will still never sound as good as it would have if you placed the mic closer to your respondent to begin with. So it's better to spend the money initially and let your work shine.
- **Setting up the camera:** Thankfully, cameras have gotten a lot better over the years. An HD camera is a lot more affordable and will give your editor many more options for your final video. When setting up your camera, place it in front of your respondent, with the moderator in between it and the light or window (refer to Figure 7.2). It works best if the respondent is framed a bit to one side and looking across the frame, toward the moderator. When respondents look directly into the camera, the setting appears staged.

Frame your picture close if you want to capture emotion, but leave room in case your subject shifts or sways (and he always does). That will also leave you room for a nametag if you choose to place one in your video. Finally, look again at your respondent's eyes. If you can't see the color, move the light closer until you can.

Practice a few times before you get into field, and you'll be able to set all this up in just a few minutes. You'll end up with impressive video, and a lot fewer hours and expenses down the line.

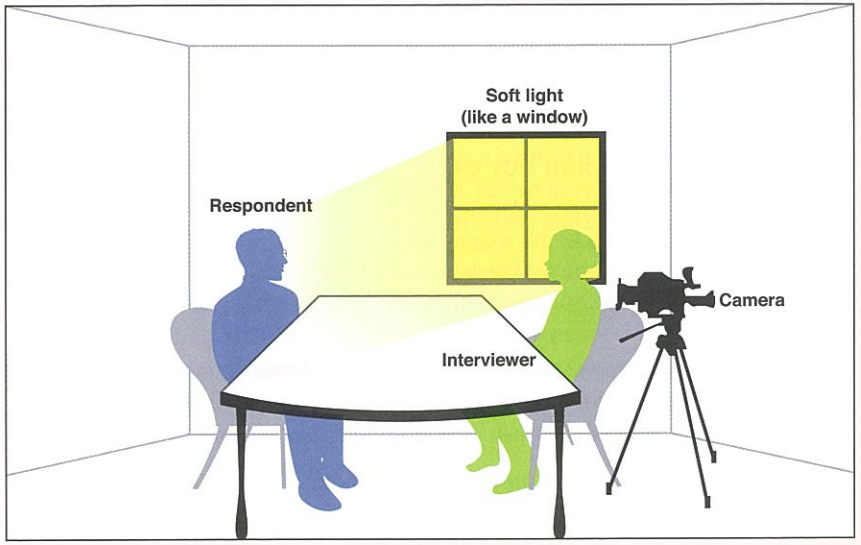

FIGURE 7.2
An optimal setup for placing the camera.

Video Recording the Interview

Video cameras are small, unobtrusive, and make for a viable default recording device. I take audio recorders as backup, but rely on video in most situations. With a video camera, you can capture the specifics of what the participant means by, "That part right there is the best one to use." You also can capture body language and nuanced elements in the conversation, which, of course, is not possible with audio recordings.

Buy an inexpensive mini (or "tabletop") tripod. This will make it easier to set the camera down during stationary parts of the interview, but will still allow you to easily grab it when you move around the environment. I haven't found that the presence of the camera is intimidating for people (especially in a post-YouTube era where it's a medium that we are all generally more familiar with), but setting it and forgetting it helps to focus you on the participant and the interview, rather than on the camera. When you are holding the camera, be aware that, even when it's facing away from you, the microphone is much closer to your mouth than the participant's, so be sensitive to your interjections, snickers, and mm-hmms, as they will really pop on the audio. For the novice interviewer, don't worry about moderating your rapport building for the camera, but for everyone else, it's worth keeping in mind.

TIP DON'T RUN OUT OF JUICE!

Be sure to have enough batteries on hand to get through the interview. I've found that cameras ship with a fairly small battery, but larger-capacity batteries are available, including compatible ones from third-party manufacturers. Shop online and stock up.

Although some cameras can adjust for backlighting, you should generally avoid having your participants in front of a window; even if you can see them, they will probably just appear in silhouette on the video.

Be prepared to manage the large files you create. Even on the lowest-quality settings, over the course of a small study you can end up with 20GB of video without trying too hard. That much digital data can fill up drives and is almost impossible for mortals (those of us with non-Pixar quality infrastructure) to move around a network.

Even if we don't edit video into a specific deliverable, it's often the richest archival artifact of the fieldwork. Video also reassures our clients that they can go back at any time to watch the interviews.

Photographing the Interview

Even if you're capturing imagery using video, still pictures are essential. When you make the deliberate choice to point and shoot, you are building the story of your participant. Even if the image in the camera is similar to a frame of video, that frame is packed in with all the other frames of video and requires effort for you to extract. You can return from the field with a set of photos and easily share an impromptu narrative of the interview by flipping through the photos on the camera. Even better, you will notice details in the photo that you didn't consciously perceive at the time. Video, with its audio track and its movement through time, doesn't as easily afford that extra detail. You might choose to just take still pictures and record audio and not bother recording video.

Be aware of how your picture taking will feel to the participants. Even though they agree to the use of photography when they sign your release, let the interview settle in before you start taking pictures. You can verbally confirm that it's okay before you take your first picture. If you are taking pictures of people, do it without the flash. If your second interviewer is taking pictures, they should not distract from the interview.

As I mentioned in Chapter 3, prepare a shot list so you have some ideas about which pictures you need to take.

Sketching the Interview

Sketching can be an appropriate medium when you can't take pictures. If you can't get an image of the participant's online banking screen, you can sketch the different regions of the interface and write callouts for some of his comments. Because he can see the sketch, he can be reassured that you aren't capturing private information and can clarify and correct your notes.

Caroline James takes that even further, using sketching as an active method to reflect back to her participants what she's hearing and to draw them out further (see Figure 7.3). She uses a combination of several specific techniques: visual recording, mind mapping, and visual note taking (sometimes referred to as "sketch noting").[1] She sketches in front of (and even with) her interview participants to engage them in creating a visual document of the interview.

I worked in the field with designer Jorge Gordon. His technique for note taking lay somewhere in between purely visual and purely textual; he used only words and lines but created a visual flow that captured his own experience (see Figure 7.4). As with many aspects of interviewing users, note taking can be highly individualistic.

TIP COLLECTING ARTIFACTS

Collect tangible examples from your fieldwork experience—buy an item from the company store, ask for a brochure, save your security pass, or keep the sample printout. These artifacts can go up on the wall in your analysis room, be passed around in meetings, or referred to later for inspiration, validation, or further insight.

1 A great intro is at http://rfld.me/QQ1Soj; also check out resources at http://rfld.me/1b6Zxo8.

FIGURE 7.3
Caroline James took these notes while interviewing me about this chapter.

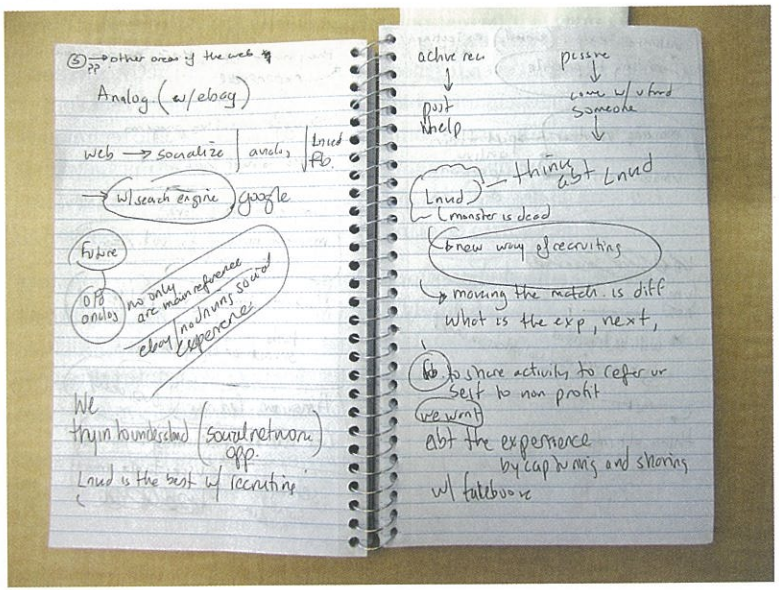

FIGURE 7.4
Jorge Gordon's fieldwork notes that include both sketch and text elements.

Debriefing After the Interview

When putting together your fieldwork schedule, you must absolutely allow time for debriefing after each interview. After you leave the fieldwork site, go for food and drink and talk about the interview. The longer you wait (say, until the next day or the next week), the less you will remember, and the more jumbled up the different interviews will become.

If you debrief as an open-ended conversation, make sure that someone takes notes (and shares them with everyone). Otherwise, use a debrief worksheet (see Figure 7.5) to capture initial thoughts, surprises, and changes for subsequent interviews. Ask, "What would we design for *this* user?" Don't worry about being too conclusive; this is a provocative way to start making sense of the interview. You aren't making design decisions; this is hypothetical, speculative, and easily discarded when future data takes you in a different direction. Make sure that your fellow researchers understand hypothesizing conclusions as a creative exercise.

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Portigal consulting

Debriefing Guide

participant: _____ **researchers:** _____ and _____

Fill this out immediately after the interview, together with both interviewers. This document will serve as a key resource for the collaborative fieldwork debrief and analysis so please be thoughtful and thorough.

GETTING TO KNOW YOU-- *describe*
Describe the person we spoke to. What do they do? What are they into? What is their home environment like?

How did they describe their process of getting DEVICE?

LIFE WITH DEVICE
How are they using the DEVICE? What features are they using? What does this device mean to them?

What kinds of accessories do they use? Which ones aren't they using? Why?

What do they like most about the DEVICE? How is it best serving their needs?

What challenges have they had? What are some of their unmet needs and wishes?

What surprised them? What surprised you?

FIGURE 7.5
Sample debrief worksheet. See more at http://rfld.me/QLhHzy and http://rfld.me/UJkyHA.

Taking Field Notes

Many researchers sit down shortly after the interview and write up notes in some detail, using their notes, memory, and recordings. These field notes can easily run several pages long and emphasize narrative and description over conclusions or business implications. This is a time-consuming task and something I've stopped doing, especially since I began using transcripts. For trained social scientists, this is likely part of their training and an essential part of their process; while it is undoubtedly valuable, consider whether you have time in your schedule to do this.

Sample Field Highlights

by Kristine Ng, for the Omni Project[2]

The Elway family is composed of Arthur (dad), mom, and three kids (ages 13, 10, and 7). They recently moved to City 1 from City 2 and didn't have Internet for a month, which the kids thought was dreadful.

Arthur and two kids—Denise and Hayley—took part in the interview. Denise has a Kindle Fire, iPod, iHome, and cell phone. She really wanted a Nook, but her father persuaded her otherwise, since B&N isn't a tech company. She said she's tired of Apple products. She FaceTimes with her friends instead of talking on the phone, and sometimes texts them. Hayley has a first-gen iPad and iPod. She's eagerly waiting until she's old enough to get a cell phone. She's been promised one in February when she starts soccer, more as a means of communication with parents for rides and so on.

Regulating device use is a main concern for the family. Denise lost access to the Kindle as a punishment for misuse. Dad said that when they're doing homework they're only allowed to listen to music, but the girls have been caught FaceTiming and watching TV while doing homework. Arthur is interested in a solution for regulating these multi-use devices since part of their use is educational. He mentioned that City 2 is more affluent and the peer pressure is greater. There are second graders with cell phones (he doesn't think they need them) and 13-year-old girls with 10 pairs of Uggs. They're constantly trying to determine how to hold onto their values while understanding that peer pressure is real. Both parents closed their Facebook accounts, partially to be good role models, but her father also has privacy concerns. He would love to know what the best practices and guidelines are for device regulation.

2 A study about the impact that digital technology is having on our lives. See www.portigal.com/blog/announcing-the-omni-project/ for more info.

Sharing Field Highlights

As soon as possible after an interview, I write a rapid top-of-mind version of the session. I am not focused on capturing all the details but am creating a sharable story that brings a bit of the flavor of the fieldwork to the broader team. With practice, these highlights (which I affectionately refer to as "quickies") take only a few minutes to write and email. Some of the effort to produce these highlights is in restraining yourself from trying to produce field notes. See an example of field highlights in Kristine Ng's sidebar on p. 116.

Summary

By documenting the interview, you are capturing a definitive detailed record of the interview. It's also a way for you to process and remember the insights and take-aways that come to you while the interview is happening.

- You can't catch everything by taking notes. You do need to get *everything*. In the moment, you will miss details or mishear a word.
- Recording audio or video is the only way to capture all the details of your interview.
- If you take notes on a computer or other device, can you do so silently and maintain your engaged eye contact with the participant?
- Notes should be descriptive rather than interpretive; when you go back to them later, it's hard to tell the difference between what actually happened and your own interpretations.
- Use a small video camera with a pocket tripod or a simple digital audio recorder; external mics will improve audio quality, but body mics create an awkward interaction with the participant when setting up.
- Have plenty of batteries for all of your devices and be aware of how long they should last.
- Take lots of pictures; they often reveal something different later on.
- Sit down with the field team right after the interview and debrief about key take-aways. Soon after, write up quick highlights and share them with the rest of your team.