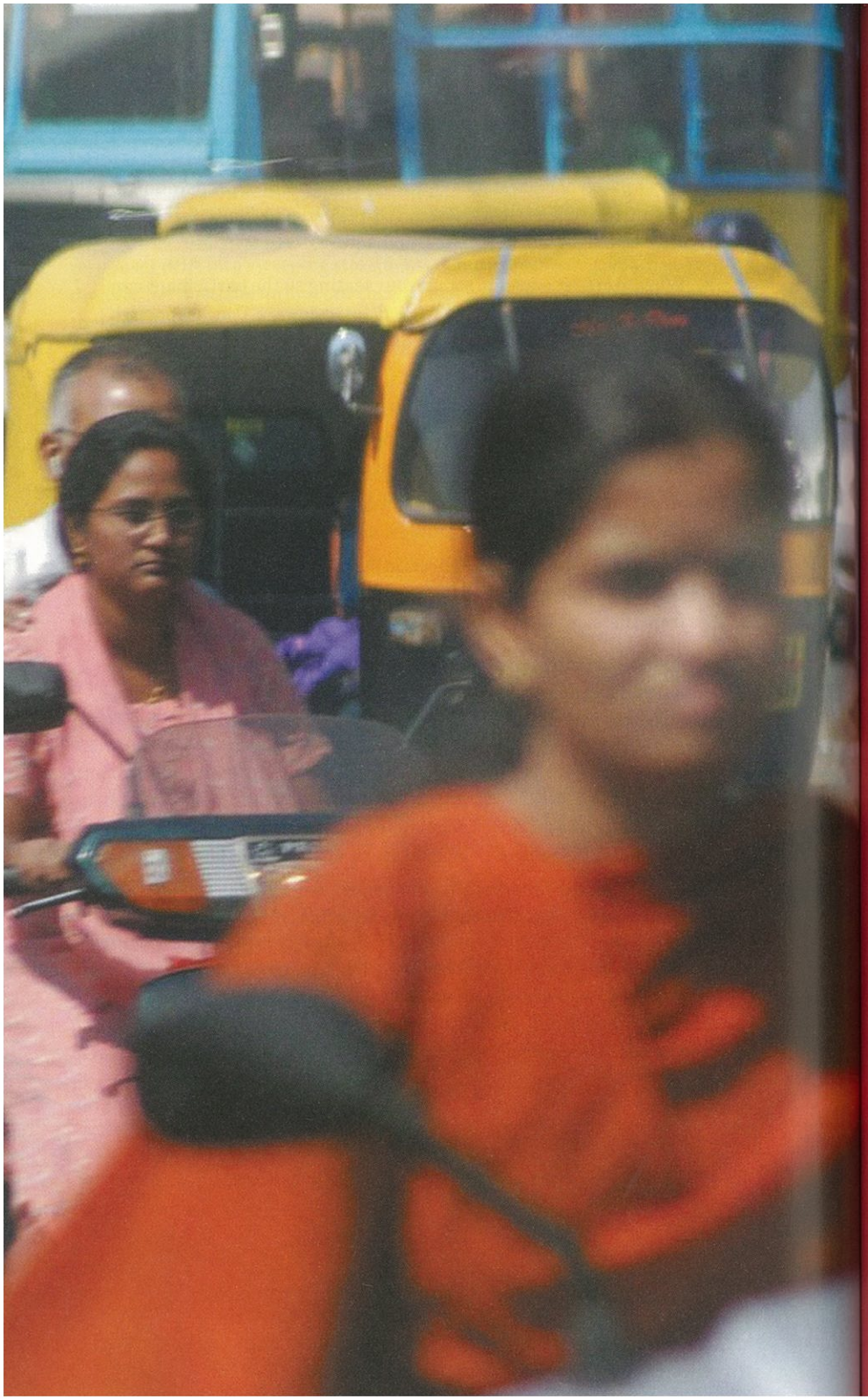


CHAPTER 6

How to Ask Questions

So there you are in "the field," that coolest of phrases that means that today your assignment is to talk with a stranger in her kitchen, maintenance shed, copy center, or other unlikely environment. As you get down to business, your printed copy of the field guide is gripped tightly in your sweaty paw. All your objective-setting, question-wordsmithing, and other planning is captured in 11-point type on these precious four sheets of paper.

Now, set it aside.

Leading the interview successfully comes down to *you*. Go ahead and refer to the field guide as you need to, but don't let it run the interview. It's not a script; it's only for reference purposes. If you get stuck about where to go next, that's when you pull it out and scan through the pages. Despite your planning, the interview probably won't unfold the way you anticipated. If it does, perhaps you aren't leveraging the opportunities that arise. If you're a novice interviewer, you'll probably lean more toward the guide than improvisation. Similarly, if you're at the very beginning of a study, you should rely more on the guide than you will once you've learned from a couple of interviews.

TIP HOLD ONTO YOUR LOOSE-LEAF

Keep your field guide in a portfolio, a folder, a sheaf of papers, a notebook, or something else. You'll be better off if the guide appears to be put away when you aren't using it. Early on I did an interview with the field guide held out in front of me as my only bit of "business." At one point, my participant snatched it from my hands and said, "Okay, what else do you wanna know?" Although this is unlikely to happen often, it served as a good lesson for me to tote my paraphernalia in a more professional (and protected) manner.

Silence Defeats Awkwardness

After you ask a question, be silent. This is tricky; you are speaking with someone you've never spoken to before. You are learning about her conversational rhythm, how receptive she is to your questions, and what cues she gives when thinking about an answer. These tiny moments—from part of a second to several seconds—are nerve-wracking. One way a novice interviewer tries to counteract nervousness is by preemptively filling the silence. So the interviewer asks long questions. What he wants to know is, "What did you have for breakfast yesterday?" but the novice stretches the question out so as to delay that moment where the question is done, and he is forced to await the answer (or some awful unnamed fate). The question then becomes "What did you have for breakfast yesterday...was it toast or juice?" The novice interviewer is suggesting possible responses, and his interviewee is just that much more likely to work within the interviewer's suggestions rather than offer up her own answers. In fact, what the novice interviewer probably asked was, "What did you have for breakfast yesterday? Was it toast, or juice, or...?" You can hear the novice interviewer actually articulate the ellipsis, as a descending, slowly fading "Rrrrrrrr?" That trailing sound is the last gasp at holding onto the question

Don't do this. Ask your question and let it stand. Be deliberate about this. To deal with your (potentially agonizing!) discomfort during the silence, give yourself something to do—slowly repeat "allow silence" as many times as it takes. Use this as a mantra to calm and clear your mind (at least for the moment). If the person can't answer the question, she will let you know.

After she has given you an answer, continue to be silent. People speak in paragraphs, and they want your permission to go on to the next paragraph. You ask "What did you have for breakfast yesterday?" There's a second of silence, and the person tells you, "I had toast and a bit of yogurt, and then about 20 minutes later, I had steak and eggs." Our novice interviewer figures it's time to move on to the next question, asking "Oh, okay. Where did you buy those groceries?" But the best play is to just rest for another beat. Usually, the person will continue. "Well, in fact, yesterday was quite unusual because what I typically do is just have a granola bar, but my sister was coming to visit, and I had to prepare for all of us before she got here." By simply not asking your next question, you can give your interviewee time to flesh out the answer they've already given you. Try to sense when the thread is played out, and it's time for your next question.

TIP PARAGRAPH SPEAK

People do speak in paragraphs. You can see evidence of this by looking at an interview transcription. The pauses between blocks of content are interpreted by the transcriptionist as paragraphs.

Werner Herzog's documentary *Grizzly Man* tells the story of Timothy Treadwell, a self-professed naturalist who lived in the wilderness to be close to his beloved grizzly bears, only to be mauled to death. There's a scene in which Franc Fallico, Alaska's state medical examiner, presents a watch, still in an evidence bag, to Treadwell's ex-girlfriend, Jewel Palovak. Herzog, holding the camera, cuts between passively observing the dialogue between the two of them and inserting his own questions about her memory of Treadwell (and his girlfriend who died with him). Finally, Fallico has Jewel sign some official papers, and the process is complete. Herzog doesn't cut and continues to film the two. But nothing is happening! They have uttered their concluding words and smile awkwardly and stare at nothing. Moments tick by and still no cutting. Jewel gives a sharp intake of breath, and Herzog, holding the camera, steps forward. Another moment goes by, and she sobs, breaking down for the first time in this entire sequence. "It's the last thing

that's left." Herzog is directing the scene while observing and interviewing. He lets a delicate moment hang uncomfortably, and a devastating emotion emerges. That's the power of silence.

Even if you don't feel nervous, you can't really know what's going to happen as you ask a question.[1] Perhaps your participant will start to answer the question while you are asking it (indeed, you can see this sometimes when the participant's whole affect changes as he begins to understand the question and his face shifts dramatically as he brings his answer out to the launch pad). Perhaps he'll be supremely fast-talking[2] and whip out an answer the very moment you've finished asking it. Perhaps he will wait for you to finish your question and take some amount of time to start speaking, and during that gulf between question and answer he may give you really great "I'm thinking" cues (hand rubs chin, eyes gaze away, lips pursed, and so on). Perhaps he'll give you a juicy verbal cue, like "That's a great question...ummmm...." Or he may simply stare at you, giving no quarter, until he answers. Be prepared for any of these!

With some participants, it takes me most of the interview to align my pacing with theirs. I'm particularly vulnerable to what one might call the Skype effect. When technology (VOIP, Skype, transatlantic cables, satellite transmission, and so on) introduces a small delay in conversation, we get messed up pretty quickly; the pauses we listen for at the end of someone's speech are not quite in real time and so we start to speak at the same time as the person on the other end of the call. We hear each other start and so we abruptly stop and defer to them. It's challenging to correct this out-of-phase state. Of course, this happens in person as well, without any technologically introduced delay. Some people just have different natural rhythms. There's no magic fix, any more than there's an easy way to successfully talk on the phone when you hear an echo of your own voice. This is stuff happening way below conscious thought, down at the autonomic level. At the very least, be mindful of the out-of-sync phenomenon and try to slow...yourself...down.

Managing the Flow

At a high level, most of the interview can unfold naturally from the kickoff question (see Chapter 5, "Key Stages of the Interview"). Strive to weave the questions from your field guide into follow-up questions. Although it won't cover the entirety of the interview, pursuing this ideal will help develop rapport, demonstrate listening, and create an interaction that feels more conversational than interrogatory.

Not everything can be a follow-up. Some threads run out of steam, or sometimes you need to deliberately change the discussion in order to dig into a specific area of interest. The guiding principle here is to *signal your lane changes*. Compare these two snippets of a hypothetical interview:

Version 1

Q: And what happened when you downloaded the updated version of the iPhone app?

A: (laughs) It installed instantly!

Q: Where do you keep your used oil drums?

Version 2

Q: And what happened when you downloaded the updated version of the iPhone app?

A: (laughs) It installed instantly!

Q: Okay, this is great. I'm just going to shift direction here. Maybe you can tell us, where do you keep your used oil drums?

In the second snippet, the deliberate, explicit turn signal acknowledges the most recent answer and points the way toward the next, otherwise discontinuous, topic for discussion. As a rule, if your question isn't fairly obviously a follow-up question, you should preface it with some transitional words.

Getting to Even More of the Answer

Here's some bad news: you won't get the answer to your questions just by asking. If only you could simply utter the question and wait while the person gives you all the information you need, and then move on to the next question on your list. That's just not how real interviews go. For most threads in most interviews, you need to use a series of questions to get to the information you want. It's not that people are being difficult; they just don't know what it is that you want to know. They interpret your question in a certain way and do their best to answer it. But it's up to you to help them to tell you what you need to learn about.

When you listen to your participant answering your question, be vigilant. Do they appear to have understood what you intended by the question, or have they gone somewhere else with it? Their interpretation may be more revealing than what you intended, so you may just let the conversation go down that path, or you might want to wait for an appropriate time to redirect back to the topic you were initially interested in.

1 Detailed analysis of "turn taking" is part of conversation analysis, a subdiscipline of linguistics. Experts explore how intonation, pausing, and body language inform the interaction between speakers. Unlike your work as an interviewer, conversation analysts don't do their work in real time.

2 A wonderful example is the rapid-fire dialogue between Hildy and Burns in the 1940 Howard Hawks film *His Girl Friday*.

Silence Abroad

by Lynn Shade

Lynn Shade is a freelance UX designer and researcher who previously worked at Claris, Apple, and Adobe. She grew up in Japan and is bilingual.

FIGURE 6.1
Lynn Shade

Over the course of my career, most of the user research I've done has been in Asia, in large part in Japan, where I happened to grow up and where software companies used to invest in efforts to understand market needs. Years ago when working for Apple, I accompanied a Dutch colleague, Anke de Jong, to New York for field research for new laptop models. Trained as an industrial designer, Anke designed at the intersection of hardware and software. This made her research interesting in and of itself, but what I remember most vividly from that trip was being occasionally astonished at her use of silence to impel further comment.

This technique wasn't for the most part necessary since as compared to Asian participants, these participants talked a lot. Admittedly, we were interviewing New Yorkers, but the willingness and eagerness of American study participants to express themselves verbally was the source of considerable discussion and hidden envy among myself and my Japanese colleagues. In Silicon Valley at the time, the solo-participant-in-a-lab Talk Aloud methodology was enjoying great popularity as the de-facto usability testing methodology. Upper management expected this quick lab technique would be used to inexpensively confirm U.S. results in other countries. Doing research in Japan wasn't so easy. Beleaguered by the all-too-common silent-fish Japanese participant, Japanese colleagues and I would discuss endlessly and even devote entire conference presentations to how to draw our quiet participants out, and what magic combination of factors might encourage them to speak.

However, even Americans can go silent after answering a question. If this happened, Anke would deliberately not comment, waiting calmly and putting what seemed to me subtle stress on the interviewee. The first few times I observed this, the Japanese part of me would grow slightly anxious as the silence hung in the air for a half-beat too long. Invariably, the interviewee would break it. The additional information was often valuable; they'd clarify or amend, or start a new topic with a new observation, or make a connection that offered interesting insights. The interviewees, while feeling the need to break the silence, seemed not to mind. They often became very talkative, responding to the silence as the encouragement it was.

Using silence as a mechanism to elicit participants to talk is a common technique, but it stuck in my head. Over the years as I continued doing research in Asia, I thought quite a bit about that New York experience and silence in general. Silence in user research in Japan is so important. We allowed lots and lots of room for it. There have been entire books written on Japanese silence, but for the purposes of this sidebar I'll summarize Japanese conversational silence into three broad categories: setting-the-stage silence, effort silence, and failure silence.

- **Setting-the-stage silence:** Along with body language, setting-the-stage silence is a spot of silence from both sides to indicate readiness for a shared experience. Both parties work to set the mood for a productive conversation, and some of this work is done with silence. This silence takes place here and there during initial greetings, along the way as topics change, and is most obvious when greetings wind down right before initiating the topic at hand. Lest this paint the wrong picture of some prolonged zazen meditation-like situation with a temple bell tolling in the background, let me hasten to add that those setting-the-stage silences can be long or quick, depending on personalities. Fairly typical in lots of situations is saying the equivalent of "um" with a trailing silence and the other party nodding, again followed by a bit of silence. Setting-the-stage silence is created partly because silence is considered a more deeply shared experience than talking—a version of that exists in many cultures—and partly showing mutual respect and mutual humility for the other's expertise. The interviewer's task here and during the interview is to match the interviewee's natural response and thought pace, allowing time for both sides to ponder questions.

- **Effort silence:** During the interview, silence indicates making an effort to help the cause along. The interviewee will be silent to show they're thinking the topic over carefully and showing a desire to contribute to the interviewer's goal. The interviewer will be silent to show they're thinking the subject's response over carefully and showing respect for the effort the interviewee made in answering. All parties may be silent when faced with a very difficult or complex question to show respect for the difficulty by giving it due diligence and giving the question and the other parties room to think. Essentially, Japanese people are being conversationally encouraging by using lots of silence.

- **Failure silence:** The tones of silence to watch for are silence indicating resistance and silence indicating confusion. If the interviewees don't feel knowledgeable enough or qualified to answer the question, they'll fall silent. Likewise, when confused by a question and unsure, interviewees can fall silent. This "falling silent" has its own tiny cues and must be broken by interjections from the interviewer. If the failure silence is overly prolonged, the interviewee will start experiencing the stress of failure. This is why the waiting-without-help technique used so successfully in New York wouldn't work in Japan, at least not without considerable modification.

The designer Kenya Hara has a rather lovely section in his book *White* on the meaning of emptiness in the Shinto shrine architecture. He describes how the space created by tying the tops of four pillars with ropes creates emptiness that has potential as a vessel to receive thoughts and feelings. He later goes on to tie silence to emptiness and suggests that silence has the possibility to enrich mutual comprehension. Building on this, it's hard to imagine silence in Japanese conversation as being created simply to facilitate a means to a certain end. Rather, successful Japanese silence is a roomy empty space that, created by both parties, helpfully exists to allow communication.

Is there more that you need to probe further on? People sometimes speak in coded terms: "...this was before the earlier situation that changed my purchasing...." The "earlier situation" may be something they are uncomfortable revealing, at least for now, or it may be that they aren't sure if they have your permission to share the specifics of the "earlier situation." Even if you don't follow up immediately, it may be a topic you want to return to.

Are you asking the question in a way they can answer? In a study about customer service, a participant complained passionately about the poor telephone service he received from a retailer. I asked him how the service might be different, but he could only speak about the current situation. Eventually I shifted my tactics entirely, and we role-played an imagined future version of the telephone interactions. My follow-up questions focused on uncovering the specific details that made his scenario a desirable one.

A Palette of Question Types

The field guide is your (highly idealized) hypothesis for how you will ask questions. But really, you'll spend much of your effort in the interview digging further and giving your participant the best opportunity to share deeply. You need a broad set of question types in order to make this happen. Here are some examples to get you started:

Questions that gather context and collect details:

- **Ask about sequence.** "Describe a typical workday. What do you do when you first sit down at your station? What do you do next?"
- **Ask about quantity.** "How many files would you delete when that happens?"
- **Ask for specific examples.** "What was the last movie you streamed?" Compare that question to "What movies do you stream?" The specific is easier to answer than the general and becomes a platform for follow-up questions.
- **Ask about exceptions.** "Can you tell me about a time when a customer had a problem with an order?"
- **Ask for the complete list.** "What are all the different apps you have installed on your smartphone?" This will require a series of follow-up questions—for example, "What else?" Very few people can generate an entire list of something without some prompting.
- **Ask about relationships.** "How do you work with new vendors?" This general question is especially appropriate when you don't even know enough to ask a specific question (such as in comparison to the earlier example about streaming movies). Better to start general than to be presumptive with a too-specific question.
- **Ask about organizational structure.** "Who do the people in that department report to?"

Questions that probe what's been unsaid:

- **Ask for clarification.** "When you refer to 'that,' you are talking about the newest server, right?"
- **Ask about code words/native language.** "Why do you call it the *bat cave*?"
- **Ask about emotional cues.** "Why do you laugh when you mention Best Buy?"
- **Ask why.** "I've tried to get my boss to adopt this format, but she just won't do it...." "Why do you think she hasn't?"
- **Probe delicately.** "You mentioned a difficult situation that changed your usage. Can you tell me what that situation was?"
- **Probe without presuming.** "Some people have very negative feelings about the current government, while others don't. What is *your* take?" Rather than the direct "What do you think about our government?" or "Do you like what the government is doing lately?" This indirect approach offers options associated with the generic "some people" rather than the interviewer or the interviewee.
- **Explain to an outsider.** "Let's say that I've just arrived here from another decade, how would you explain to me the difference between smartphones and tablets?"
- **Teach another.** "If you had to ask your daughter to operate your system, how would you explain it to her?"

Questions that create contrasts in order to uncover frameworks and mental models:

- **Compare processes.** "What's the difference between sending your response by fax, mail, or email?"
- **Compare to others.** "Do the other coaches also do it that way?"
- **Compare across time.** "How have your family photo activities changed in the past five years? How do you think they will be different five years from now?" The second question is not intended to capture an accurate prediction. Rather, the question serves to break free from what exists now and envision possibilities that may emerge down the road. Identify an appropriately large time horizon (A year? Five years? Ten years?) that helps people to think beyond incremental change.

She Blinded Me with Silence

A while back I was in my first public improv show. We were all amateurs, some with many years of experience, others with a year or less (such as me). In this performance, we started each scene with one idea (often from the audience) and proceeded with some sort of structure. What often happened was a scramble to move the idea forward—everyone speaking at once, with too many ideas "thrown" in the first few moments to ever really solidify into a great scene. Have you ever seen 8-year-olds play soccer? The ball and both teams are a whirling cloud that moves up and down and across the field like the Tasmanian Devil. That was us.

But then the next night I saw the Kids in the Hall—a comedy troupe that has been performing together for a very long time. After the scripted material had finished, the audience was clamoring for more. In advance of the encore, they all walked on stage and thanked us, and then improvised a few jokes before heading off stage to prepare for the encore. All five of them managed to hold the stage coherently. Not everyone spoke at equal length in those few minutes, but at no point did any of them speak on top of another. It came off as natural and easy, but it was really quite incredible.

Where they succeeded, and we didn't succeed as well (for there are no losers in improv) was in allowing for silence. Each Kid in the Hall was silent for most, if not all, of their unscripted segment. What a powerful contribution they made by not speaking. Isn't that a strange statement to make? A comedy performer contributed by not speaking. How can that be? We tend to expect performance to be the explicit utterances, not the space between them.

There's a lot that can happen without verbalization—posture, gestures, breath sounds, eye gaze, facial reactions, and more. The Kids in the Hall were doing all those the entire time—and they were paying attention to each other. When they were silent, they were actively silent; they were sending and receiving information.

This behavior is crucial when interviewing users. I would estimate we speak as little as 20 percent of the time. Yet the interviews are directed and controlled by the interviewer. Nodding, eye contact, and body language all support the respondent in providing detailed information.

Of course, there is often more than one researcher on hand. If the first ethnographer remains silent, waiting for the respondent to continue, the second interviewer must recognize that, and also listen silently, rather than using the opening as his chance to interview. This collaborative use of silence is something the Kids in the Hall managed, and my improv group did not.

We experience these same challenges in more familiar work settings: brainstorming, meetings, and so on. We work in a society that judges us primarily by our own contributions, rather than the way we allow others to make theirs. If the collaborative silence is not a shared value in a group, there can be a real challenge for those who default to listening, not speaking. We've learned how to give credit to those who utter the pearls, but we don't know how to acknowledge the value of those who choose their moments wisely, who allow others to shine, and who ultimately enable those pearls.

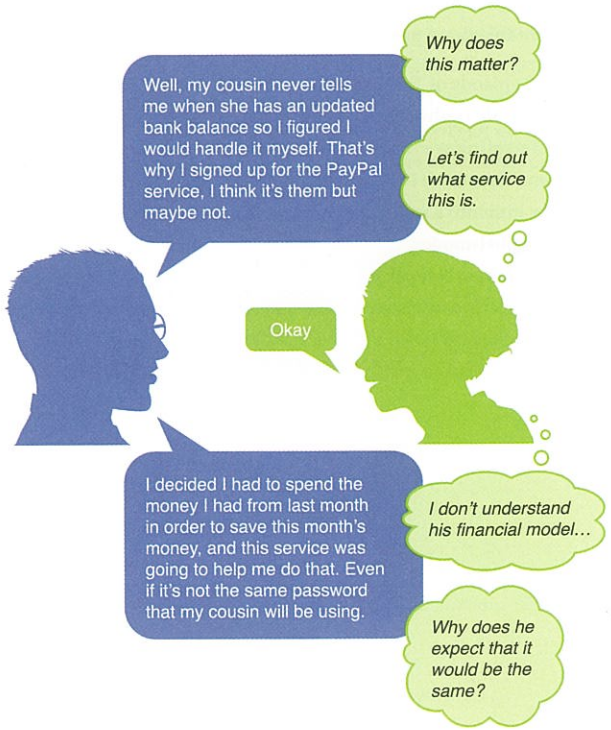
In a 2002 episode of The Simpsons (DABF05, "Jaws Wired Shut"), Homer's jaw is wired shut. He is physically unable to speak. He does become a better listener, but most interesting are the positive qualities the people in his life project upon him. Simpsons' Executive Producer Al Jean said: "When Homer gets his jaw wired shut, it makes him into a really decent, wonderful human being." I don't know if Al Jean is getting post-modern on us, but Homer's internal change, through his silence, was fairly minor compared to the differences that other people perceived. For even more on this theme, check out the book *Being There* by Jerzy Kozinsky (or the film with Peter Sellers).

Managing the Ebb and Flow of the Interview

As a plan for an idealized interview, the field guide is, of course, linear. But the active planning process you go through during the interview is actually more of a tree (see Figure 6.2).

This is a fairly typical snippet of an interview. It's what is going on for the interviewer that deserves some special focus here, though. As the participant is explaining in his natural manner, the interviewer is identifying other questions to ask. At the first pause, the interviewer has at least two new questions (beyond what's already in her interview guide), but the questions encourage the participant to continue by responding with "Okay." As the participant continues, she might identify another two topics to be explored. Maybe those topics are included in the interview guide, but probably they aren't.

Sadly, most of us are constrained by the linearity of time. We can't clone ourselves and follow each thread in parallel universes. We have to stick with our own reality.



GURE 6.2
en in this tiny
cerpt of an inter-
w, the interviewer
s to track a great
al of information
d make choices
out where to
next.

In addition to watching the clock, maintaining eye contact, building rapport, and so on for most of the interview, your job also includes managing this tree. Here are some coping techniques:

1. Wait patiently until these threads come up again in conversation organically, without you having to ask. Often they do.
2. Jot quick notes on your field guide about what you want to come back to, so you don't forget.
3. Prioritize (or perhaps *triage*) based on your research objectives. Although something that seems irrelevant does often prove to be insightful, you have to choose. So be opportunistic and choose what you think is going to bear fruit for your area of inquiry.
4. Triage based on what makes the best follow-up, in order to demonstrate listening and further the rapport.

   Come back to a topic later if it still seems important; refer back to the participant's previous statement in order to establish continuity. ("Earlier you mentioned using PayPal. I wanted to ask a bit more about that.")

TIP **GOING WITH THE FLOW**

The complexity embedded within the exploding questions tree might suggest that interviewing really sucks. In fact, dealing with these challenges can take you to someplace very creative. Mihály Csíkszentmihályi has articulated the psychological notion of *flow*— as "the mental state of operation in which a person in an activity is fully immersed in a feeling of energized focus, full involvement, and success in the process of the activity."[3] This certainly happens to me in interviews. My brain is firing on all cylinders with all the responsibilities I'm managing, and yet I can feel myself slow right down. It's a feeling in both my brain and my body, which compares to the familiar special effect, often seen through the view screen when a spaceship enters hyperspace and the stars stretch out from points into lines. In this calmness, I'm not ignoring the complexity; instead, I'm somehow above it. Things become very quiet in my head, and I can feel myself riding on top of the challenges of the interview. It's not boredom; it's a very engaged feeling. It's the opposite of the chicken-sans-head feeling you might imagine the demands of an interview could lead to. This flow state both creates and is fed by the imperative to keep silent, keep myself out of the equation, and let the experience breathe, while still being the most creative and insightful time during fieldwork.

3 http://en.wikipedia.org/wiki/Flow_(psychology)

Embracing Your Participant's Worldview

In Chapter 2, I introduced the principle of embracing how participants see their world. That principle informs the entire approach of a study, but it becomes vital once you are with that participant and asking questions. In this section, you'll see how to ensure that your questions make it clear to both you and your participant that you are curious, even hungry, to understand their worldview.

Use Their Language

Years ago I was working with a client on understanding the opportunities for a new home entertainment technology, targeting everyday consumers. We were in the family's home to speak with them about their current gear and how they were using it.

In this house, the father had put a lot of effort into making product choices that would enhance their family's time together. He was visibly (and appropriately) proud of their setup. As he explained the choices he had made, he explained how he didn't want a DVR, because of his concerns over privacy. He referred to the leading DVR brand, TiVo, but mispronounced it as "Tye-vo."

"I took a look at Tye-vo, but didn't want anyone paying attention to what we watch the way Tye-vo does so I decided that Tye-vo wasn't for us." As with many stories, this one has become richer in the retelling, but you can imagine how my client, originally an engineer, quietly winced each time the brand name was misspoken. I could sense his winces without turning my head to look at him.

The interview continued and when it was appropriate for me to ask follow-up questions about DVRs, I referred to it as the participant did—as Tye-vo. But later, when the client asked some of his own questions, he pronounced TiVo correctly as "tee-vo." This was a small, yet dramatic moment in the interview. This proud man was revealed to be, well, stupid, in front of his family, in his home. Despite being a self-proclaimed expert in these types of products, he was indirectly corrected and thus lowered in status. You could immediately feel the power dynamic in the room shift; now we were the experts, and he was just some dude. Of course, that's not the situation I was hoping for!

My client was a wonderful, sweet, caring person who would never dream of making this participant feel that badly. But it would have never occurred to him to say something the "wrong" way. Yet in this situation, it was right to be wrong. It wasn't our role to be right.

Design researcher Todd Hausman talks about his work on an instant messaging product, when research participants would refer to "emochicons." In reflecting back their pronunciation, he was viscerally reminded of the risk in making assumptions about users.

Letting go of being right is something to pay attention to in most interviews; it doesn't have to be as glaring a situation as a participant's mispronunciation of a technology or a brand name. It could be in the description of a part, a process, or just about anything. Even if there's not an obvious "right" or "wrong" way to refer to something, you must defer to the participant's way.

TIP **WHEN IT'S AWKWARD TO USE THEIR LANGUAGE**

It can be challenging to use someone else's terminology and feel as if you are being authentic. (After all, you are trying to establish rapport, and being fake would destroy that.) Participants in a study told us about a new technology that was being developed at their organization, called an *aggregator*. Due to its troubled history, it was referred to colloquially as an "aggravator." This term was used more frequently in the interview than "aggregator." But it wasn't comfortable for our interviewer to ask about the "aggravator." They didn't really have permission from the group to use their insider language, and they ran the risk of coming off as flippant or minimizing the seriousness of the development effort. They resolved it by acknowledging the participant's language and their own reluctance to use the same phrase. Going a little meta (such as "I want to ask about what you like to call the aggravator") enables the interviewer to point to the language directly, acknowledging the participant's terminology, as well as referring back to the previous conversation about the terminology itself. When the words being used become a topic in the interview, pointing to the words in this manner is appropriate.

In one project, a research participant referred to a technology platform their firm uses. Our client, perhaps trying to demonstrate insider status and reassure the participant that this interview was valid, asked about the platform but used an abbreviated form (in essence, a nickname) of the platform name. The participant responded by hesitantly using this nickname and then immediately correcting himself and switching back to the full name that he had originally used. If my client simply *had* to introduce his alternative name for the technology, he could have asked "Oh, when you say [platform name], I wonder if that's the same thing I'm used to calling [nickname]?" In this case, there would be no ambiguity, and he would not in any way be trying to clarify, so the better course of action would have been to build rapport by accepting the terms the participant was using rather than trying to demonstrate credibility.

Assume Your Participant Makes Sense

You may hear and see apparent contradictions. People may tell you they value cleanliness and then open a bedroom door to reveal piles of dirty clothes on the floor. Or people may express a preference for a certain type of feature and then reject an example you show them. Although you might find this frustrating, try to see it as an opportunity. Your interpretation of "cleanliness" may be oversimplified. The social performance of valuing cleanliness may be entirely separate than the act of maintaining cleanliness. Your framework for what that feature is doing may not align with the participant's framework. These seeming disconnects are indications that you need to explore further. This isn't about calling out hypocrisy; it's about probing to understand.

Don't Make Your Questions Pass/Fail

A client joined me in the field, arriving at our pre-meeting with mere moments to get acquainted and review the approach. This was not an ideal arrangement (and a good learning moment for me) and led to a dysfunctional dynamic. Her abrupt questions for our participant were presented more as tests than as inquiries. She asked our participant if she knew what a USB cable was (see Figure 6.3), phrasing it as a challenge rather than as something she was curious about. Later, she presented her framework for the digital media functionality she was charged with designing and asked the participants if they understood the difference between the various terms used in the framework. As an exercise, imagine asking someone if they know what a USB is. You might even try this out loud. First, ask in a gentle, curious fashion. Next, ask in a judgmental critical tone. In this case, my client was somewhere in between, but far too close to the critical side of the continuum for comfort. The participant became confused and very uncertain about how to talk about her usage since these terms were indeed unfamiliar. It's good to understand if the language you are using internally aligns with the way people are really talking, but that doesn't mean you need to thrust your terms at people and test them on whether or not they can explain them.

FIGURE 6.3
Do *you* know what a USB cable is?

Don't Presume They Accept Your Worldview

I interviewed a young man who had gone through a significant personal change, first living abroad as a successful professional, and then returning to California to live in his parents' home to go back to school. At one point in the interview, my client commented to our participant (let's call him Keith) about the differences in value systems between "Old Keith" and "New Keith." Even though this is not a framework that Keith had explicitly articulated to us, he said, "Right."

After a few minutes of further dialogue, I decided it was time to intercede, and I asked Keith what he thought about this idea of the old versus new Keith. Given the chance to expound, Keith told us, "I don't really see it."

At no point had Keith told us that he had old and new versions of himself. Keith was always Keith. My client was synthesizing on-the-fly and had imposed his model on Keith. And what did Keith do? He agreed. Of course he agreed! Why should he argue about something like that? Just because a framework isn't rejected by the participant doesn't mean it is accurate!

Good and Bad Examples from Marc Maron

In an episode of Marc Maron's WTF podcast,[4] he spoke with 85-year-old comedy legend Jonathan Winters. Within this interview are several examples that embody the points I've made throughout this chapter—getting to more of the answer, asking clarification questions, managing the ebb and flow of the interview, and not presuming that the participant accepts the interviewer's worldview.

Early in the interview, Maron asked a fairly direct question:

You were in the Marines. Where were you?

Winters answered:

I went in at 17. The Japanese were way down on the list...Pearl Harbor. I didn't get along with either parent; they were divorced; it didn't seem to matter; they didn't like me.

His truth-in-comedy comment about his parents seemed to be a non-sequitur, and he continued on about his parents and some of his time in the Marines for more than three minutes (finally explaining that he was on an aircraft carrier, which answered Maron's question), before concluding with:

But I enjoyed the Marines...I only made corporal, but that's okay...

Maron picked up on the earlier non-sequitur and asked:

Was it a way to get out of your parents house?

And Winters quipped back:

Yeah, yeah, they were eager to sign. I never saw two people sign papers so fast!

Although the answer to Maron's question was buried within several layers of stories, Winters only *implied* his motivation for enlisting. Maron did the right thing and asked his subject explicitly about it. As the interviewer, you want to find out for sure, from the subject's perspective, rather than leaving things to your own inferences.

Later in the interview, Maron was less successful as an interviewer. Winters described an early job working as a radio DJ. In this job, he eventually got bored and did interviews with himself, playing different characters. Management objected, Winters persisted, and he was fired:

Winters: *I did try some more guests and that was the end of that career there.*

Maron (laughing, interjected): *You had to, though, right?*

Winters: *I had to.*

Maron: *Yeah! It felt too good, right?*

Winters: *It felt good. I did a year there, and then I went to Columbus.*

Maron's interjections reflected his own interpretation: that Winters must have been compelled to continue doing interviews with himself because of how good it felt. Winters never actually said that, but Maron stated it as a fact, where his "right?" was not truly a question but more like a fellow bar patron elbowing you in the ribs while asking you to agree with him. What this transcription failed to capture was the momentum Winters had in telling his story, and even though he agreed with Maron, he was sidetracked from his story and ended up expressing parts of it in Maron's terms, not his own.

4 Hear the whole episode at http://rfld.me/QLhHj5.

Don't Enter Lecture Mode

An alternative title here might be "Sit on your hands!" or "You don't need to give voice to every thought that comes into your head!" On a project that dealt with online decision support tools, one client, when offered the chance partway through the interview to follow up on the conversation so far, came up with this gem, presented here in sanitized form.

> I suppose that seems more like a divergent set of factors informing you versus specific feedback that came from any particular individual source and that served as a guiding factor for decisions for your purchase or not. I'm just thinking that it's more of a multiple...

At this point, the participant interrupted the client to tell us more about her decision-making process. Although sharing your forming thoughts *can* be a method of interrogation, it is a tricky approach, relying heavily on rapport and shared agenda to be effective. That was not what was happening here. The client didn't really say anything about anything but was just thinking aloud. Although I'm a huge enthusiast for sense making, it would have been fine for the client to have kept this in his head and declined to ask any questions.

But, within a minute of the exchange, the emboldened client continued, making declarative summary statements about the utility of a specific type of online tool. His descent into lecture mode was complete; he was not asking questions, but instead was sharing his own beliefs. He had transformed from a listener to a teller.

NOTE LEARNING FROM MISTAKES

> I'm really beating up on "clients" a lot here! But there is no anti-client subtext at all; when you team up expert interviewers (my team) and novices (our clients) you get a glorious supply of illustrative examples. These examples remind me not to do these things; I'm using them to tell you not to do these things, and for both of us to coach our respective clients not to do these things either!

If You Have to Fix Something, Wait Until the End

If you are interviewing someone about your product, it will be tempting to help her have the best experience possible. You will invariably watch her struggle to find features, express a desire for something that you know is available, or hear her describe aspects of the product incorrectly. This can be very trying for an interviewer who is also passionate about the product. (Of course you are! After all, you are out in the field meeting customers in order to make the product better!) So how do you deal with this?

Do not jump in and correct or instruct her. This is just like the TiVo example, only more so! You are conducting the interview to learn from this person, so there's no need to assert your own expertise. In fact, once you do so, you can lose control over the interview entirely, as the participant will simply turn it around and ask you, "Is there a way to do_____? How can I make _____ happen?" Suddenly, your field visit has turned into the world's most expensive tech support house call.

By all means, at the end of the interview, as you are handing over the incentive and packing up, take a moment to share anything that you think might help that person. But ask yourself if explaining something is better for you or better for her. Don't correct her perceptions or terminology if the only outcome is "educating" her. Advocate for her, not for your product.

I led an interview with a fascinating professional who blew our minds with his insights into building up a professional network over decades of his career. As he was showing us how he worked, we saw him complain as he struggled to move the cursor between his two monitors, as the one on the left was set in Windows to be on the right. After we were finished, I offered to fix this, since it was something that came up peripherally in discussion. He was absolutely thrilled and quipped that this bit of support (even more than the incentive, or the tips my clients had given him about how to use their product) made the whole time worthwhile! Hyperbole or not, I was glad to be able to do something nice for him after he had been so wonderful to us.

Summary

When you're out in the field, actually doing your interview, keep the following in mind:

- Your field guide is a *guide*. Set it aside until you really need it. Leading the interview successfully comes down to *you*.
- Although it's tricky, ask the shortest question you can, without directing them to possible answers you are looking for. Then be silent.
- When you move from one topic to another, use transitional phrases such as "Great, I'd like to shift directions now...." or "Let's go back to something you said before...."
- Pay attention to whether or not you have received an answer to your question. Be prepared to follow up multiple times using different types of questions.
- Reflect back the language and terminology that your participant used (even if you think it was "wrong").
- If you want to fix something (say, a setting on their software) for your participant, wait until the interview is over.