1 The Qualitative Interview

User   Insights   Touchpoints   Needs
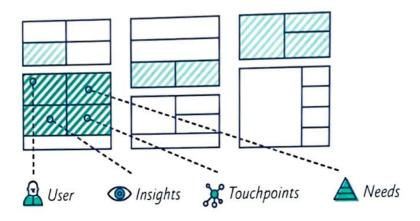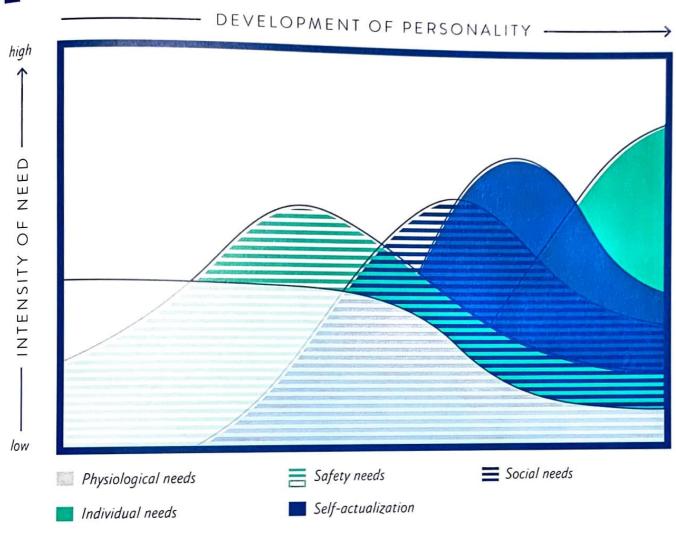
WHAT AND WHY?

The qualitative interview is the silver bullet in our arsenal. Whether we work on the project as discoverers, designers or evaluators, there is no innovation development where we would not at least once use this most common of research methods. We also use it in a slightly modified way in the EVALUATE module.

The qualitative interview helps us to capture specific information and to gain true-to-life insights about our users and their way of life. We get to know the users in the home that is their castle*[1] and we perceive the world through their eyes. In this way, we can develop empathy for our users, which is the foundation for any further steps. By means of the qualitative interview we try to fathom the needs and *motivations* of the users. Not many people are able to express their motivations off the top of their heads. For this reason we have to support them by skillfully asking questions.

When dealing with human needs we also have to consider the works of Abraham Maslow, the creator of the popular pyramidal »hierarchy of needs.« The US psychologist has defined five
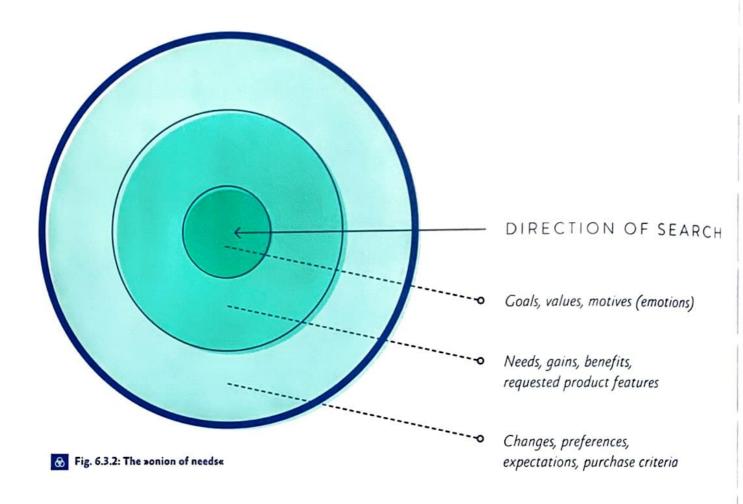
1 Or at another meaningful location for our project.

Fig. 6.3.1

DEVELOPMENT OF PERSONALITY →

INTENSITY OF NEED — high / low

Legend:
- Physiological needs
- Individual needs
- Safety needs
- Self-actualization
- Social needs

classes of needs: physiological, social, safety and individual needs and the need for self-actualization. Despite the popular view that these five classes statically build on each other so that one can only reach one step when one has completely satisfied the underlying needs, the classes are actually in a state of dynamic flow (see Fig. 6.3.1*[1]). Overlapping is possible. For us, this bears the important insight that we cannot view needs in isolation.

As we use the qualitative interview to probe for needs that are deeply hidden and not yet satisfied, we first have to »ask through« all the needs that are obvious and easy to name for the user. By asking skillfully crafted questions, we have to uncover one layer of needs after the other like onion skins until we reach the core, i.e. the innermost of the interviewee.

1 Source: Wikipedia, bit.ly/1VZhCt4 (06/26/2016)

DIRECTION OF SEARCH

Goals, values, motives (emotions)

*Needs, gains, benefits,
requested product features*

*Changes, preferences,
expectations, purchase criteria*

Fig. 6.3.2: The »onion of needs«

MODUS OPERANDI

1__We plan our interview appointments (and consider all eventualities)

Planning is essential, particularly as a qualitative interview takes its time. After all, we want to induce our interviewees to talk about things they rarely or nearly never think about: What does motivate them? What do they really want? Why do they decide in favor of something and disapprove other things? According to our experience, a good qualitative interview takes between one and three hours. Hence, we allow sufficient time. Tip: *Allow enough time for moving*

from one place to another and for any unforeseen circumstances!

We often look for users with special characteristics or those who live in interesting circumstances; e.g. people who have just changed their heating system, flight attendants who only work on long-haul flights or senior citizens who still work in retirement. These people are not necessarily free when *we* are free.

2__We prepare an interview guide

At the latest when we have set an appointment for the interview, we have to determine what information we are looking for or which assumptions we want to check.

Let us have a look at the »needs onion« in Fig. 6.3.2.

Most people can clearly express their requirements and expectations of a product but this is not enough for us. We want to get to know the desires and the deep needs of the users so that we can satisfy them by our solution.

Hence, we are also interested in the world view of the individual users. They can sometimes be important barriers for implementing a solution, e.g when we discover a hidden technophobia. Maybe the user simply does not understand the purpose of the product because it is advertized with incomprehensible terms. Important information like this probably remains undiscovered when we simply check the purchase criteria.

When the team has agreed upon what we want to know, we prepare an interview guide. It assists us during the conversation with the user and links the various topics of interest. Ideally, it also leaves enough room for new aspects that may appear in the course of the interview. On the one hand, we want to be as open to discoveries as possible, but on the other hand we have a clear idea of what we want to know. With increasing experience, we continuously get better at balancing these needs.

For preparing the interview questions, we use template 6.3.1.

2a__Meta-level

In the central circle of the template we note the various topics that we want to discuss with our interview partner, e.g. sports, food, house and garden etc. They provide the superstructure for the interview. We determine the order in which we want to talk about the various topics and jot it down.

2b__General questions

Every project is unique, and every topic calls for different approaches. Nonetheless, the question types »What does ... mean for you?« and »What do you associate with ...?« are always suitable. We can use them to express our general questions. The particular topic is based on the keywords in the meta-level circle like sports, food or house and garden.
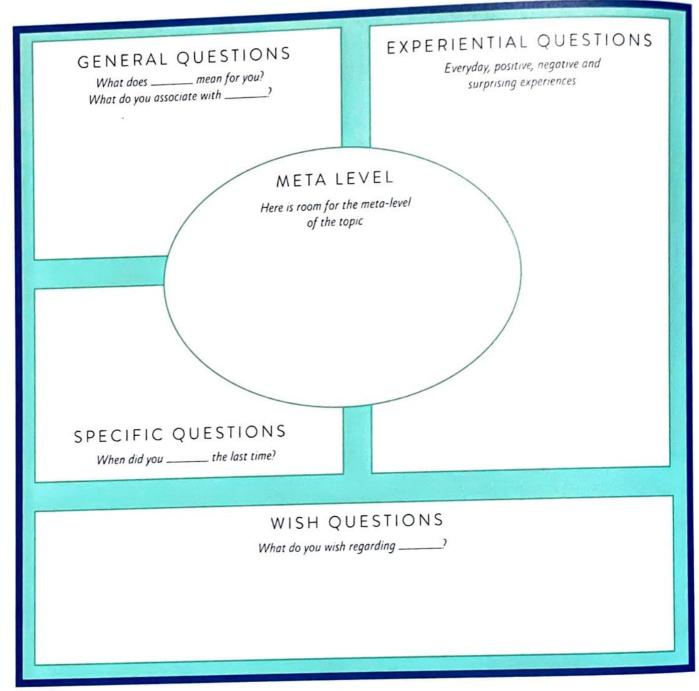
Examples:
What do sports mean for you? What do you associate with sports?
What does home mean for you?
What do you associate with health? What does health protection mean for you?

Usually, these two questions provide a first insight into the thoughts of the user about the topic of the interview. When we want to dig deeper or when the general questions do not yield any results, we proceed with experiential questions.

GENERAL QUESTIONS
What does _____ mean for you?
What do you associate with _____?

EXPERIENTIAL QUESTIONS
Everyday, positive, negative and
surprising experiences

META LEVEL
Here is room for the meta-level
of the topic

SPECIFIC QUESTIONS
When did you _____ the last time?

WISH QUESTIONS
What do you wish regarding _____?

Template 6.3.1: digital-innovation-playbook.com/templates/explore

2c __ Experiential questions

We do not ask directly about problems or needs because our interview partners are only rarely able to identify them correctly and completely. Questions about incidents, stories and experiences are much more productive. They convey unfiltered information that we can later translate into needs and obstacles (see method 4, User Motivation Analysis).

Experiential questions take up the main part of the interview. As we do not want to miss any information, we ask them repeatedly in varying forms and in various contexts. This also helps to discover contradictions and to dig deeper,

e.g. when the interviewee says that he generally abhors noise but later raves about going to the soccer stadium every weekend in order to cheer up the fans by means of a megaphone.

Examples regarding »everyday experiences«:
Tell me about your experience with ...! Why is ... important for you?
What is so important about it for you? Why is that so?

Examples regarding »positive experiences«:
What bad experiences did you have with ...? Why?
Tell me about your most horrible experience! Why has it been so bad?
What irritates and frustrates you regarding ...? Why?
What failures did you have?

Examples regarding »negative experiences«:
What was your best experience with ...? Why?
Tell me about your most wonderful experience! Why has it been so wonderful?
What are moments of happiness regarding ...? Why?
What success did you have?

Examples regarding »surprising experiences«:
What did surprise you regarding ...? Why?
Tell me about a surprising experience! Why has it been surprising?
Has there ever been something inexplicable regarding ...? Why?

We adapt the questions as needed. We also note »Why?« behind each question as a reminder. After all, we want to get to know the goals, values, motives and emotions of the user.*1

2d __ Specific questions

With these questions, we can ask again about specific experiences or things that are important for our research.

Example:
When did you ... the last time? Why?

2e ___ Wish questions

We ask questions about wishes only at the end of the interview. Up to now, our interview partner has comprehensively reported about his experiences. If we ask the wish question too early, the interviewee may be tempted to develop solutions on our behalf. This skews the interview and can even render it useless. Users cannot provide us with solutions, but we can gain inspiration from their wishes. Sometimes the answers to wish questions lead to further needs and problems.

Example:
If you were granted a wish, what would it be? Why?
How do you imagine ... in the future? How does it look? Why?

We jot down everything that we want to know, but we do not freak out when we come up with new questions three minutes before the end of the interview.
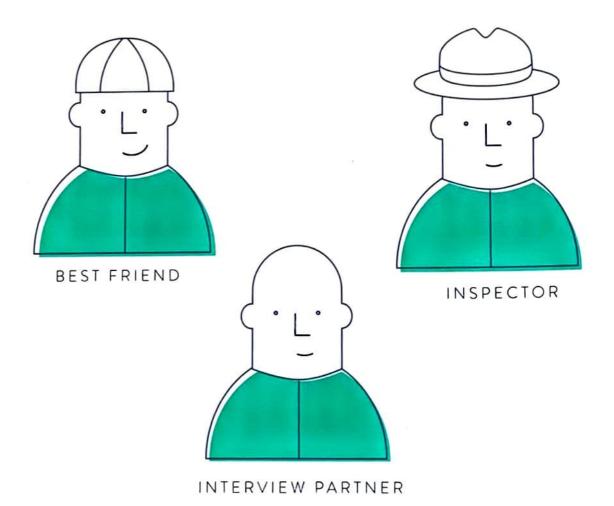Bottom line: When we follow our curiosity, we will notice the most interesting and surprising parts of the interview that we did not think of beforehand. We jump at these spots and ask further questions.

1 Remember the interview techniques from section 5.3.

3.1__We take on our interviewer roles on-site

A qualitative interview should always be conducted by two interviewers. We counteract this imbalance between one interviewee and two interviewers by clearly separated interviewer roles. It would be fatal if we interrupted each other or if we sabotage the build-up of questions of the other interviewer because our roles are not clearly defined or we deviate from the pre-defined questions of the interview guide.

In our experience, the following role allocation has proven its worth (see Fig. 6.3.3): One of us is the »best friend« who conducts the conversation, responds to the user, tries to explore the user's needs and to completely immerses himself in the user's world view. The best friend tries to muster a maximum of empathy. In doing so, he also scrutinizes the statements of the users with curiosity and (nearly) without doubt; just like a best friend who wants to help.

BEST FRIEND

INSPECTOR

INTERVIEW PARTNER

Fig. 6.3.3

In science, this approach is called the »apprentice situation.« By taking on the role of the best friend, we want to avoid any social hierarchies that may separate us from our interview partner. This also applies to our clothing and our appearance. When we act as authorities, we get different answers as opposed to when we try to blend in with the milieu of our interview partner. We try our best to avoid the effect of »social desirability.« This effect causes our user to give the answers that we *supposedly* want to hear instead those that we *really* want to hear. A good indicator of a »socially compliant answer« is the interview partners referring to themselves in the third person.

If, on the other hand, the interviewee uses the first person and tells detailed stories, we can assume that he or she does not lie to us subconsciously. Should we get a queer feeling nonetheless, we have to try to uncover the contradictions between the individual statements of the user.

Tip to avoid beginner's mistakes as interviewers: Do not use generalizations, i.e. do not say »usually« or »mostly«, because if we are doing this, we will only get generalized answers.

It is the best friend's responsibility to provide a pleasant atmosphere. Ideally, the best friend becomes the accomplice of the user and hears about things that an authority would never find out. For this reason, it is very important for the best friend to control his or her own body language. If interviewees get the feeling that we do not take them seriously or that they are hassled or mislead, then their statements will not be useful for us in most cases. The interview will end unsatisfactorily and without results.

However, we do not recommend that you grab a guidebook in order to analyze and train your body language. It is easier to control your thinking: When you enter the interview as a best friend with the positive desire to learn something, to like the interview partner and to get to know his needs, then your body language will automatically send the proper signals!

Next to the best friend we have the »inspector.« Do not worry, this is not the »bad cop« role for the interview! The inspector also wants to feel empathy with the user. However, during the interview the inspector behaves as neutral as possible, somewhat like an invisible observer. He takes notes and observes the body language of the user. It is helpful for the best friend to discover interesting contradictions between facial expressions, body language and utterances.

This distance allows the inspector to evaluate the statements of the user much more critically during the subsequent analysis of the interview. In a way, the inspector acts as the quality assurance agent for the analysis.
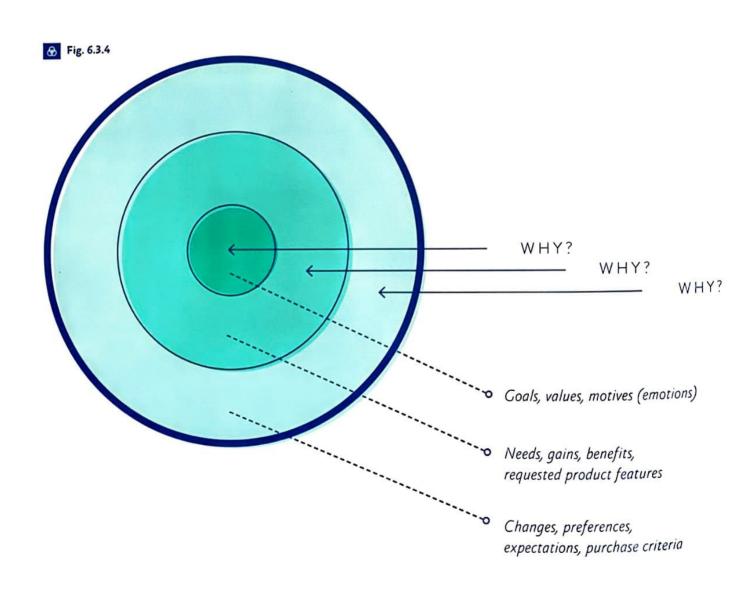
3.2___We consciously decide how we want to lead the interview

Our interview technique follows simple basic rules previously described in section 5.3. The most important one is, »We leave room for pondering.« It is a bad mistake to bombard the interview partner with questions. Never forget that we are on the quest for the unknown unknowns.

This only works if we ask *open* questions, i.e. questions that cannot be answered by »yes« or »no.« An interview works well when we hear stories: stories full of details and ratings that tell us more about the person than the content; stories that give us hints to dig deeper and learn something new; stories that we keep going by asking »why« questions.

The more often we ask »why«, the nearer we get to the core of the »needs onion« (see Fig. 6.3.4), where the goals, values, motives and emotions of the user reside.

Fig. 6.3.4

WHY?
WHY?
WHY?

Goals, values, motives (emotions)

Needs, gains, benefits, requested product features

Changes, preferences, expectations, purchase criteria

USER: ...

What caught our eye at once?	
Key sentence?	
Peculiarity?	
Was honest about ...?	

Template 6.3.2: digital-innovation-playbook.com/templates/explore

4__The quick evaluation afterwards

Immediately after the qualitative interview, the inspector and the best friend have to share their thoughts: What impression did the interviewee give? What key sentences were uttered? What was the most impressive thing we witnessed? (See Template 6.3.2.)

The first impressions of an interview that last for one to three hours are highly volatile. Hence it is very important to conduct a first short analysis *at once* and to record the most important points.

When we still have some time, we recap the way we conducted the interview: What went well, what went badly? Which questions did work, which ones didn't? What new questions and topics came up?

This also means that the guideline has to be reworked gradually after each interview. Every new insight and every new clue forces us to modify the guideline and to adapt it to the new situation.

HOW DOES IT FEEL?

We use this method in our work so often that we can no longer count the number of the qualitative interviews that we have conducted. Nonetheless we never came back from an interview in a state of utter irritation because we had not learned anything. People like to talk about their experiences and to tell stories, as long as they are not pressed for time or fear that they are being tricked. Hence we consider in advance what we want to tell the interviewees about our project and the objective of the interview. Honesty works best at this point: *We want to develop something for the needs and problems of our users.* Our interview partners will reward this attitude.

There are also stumbling blocks lurking in an interview but as with the knowledge of their existence and our interview techniques[*1] we are prepared to deal with them:

The Faster Horse effect

»If I had asked my customers what they wanted, they would have said, faster horses.«
—Henry Ford[*2]

The real problem of the user is always hidden. Henry Ford did *not* revolutionize the world by means of faster horses but he realized the core need behind the statements of his contemporaries, namely a faster means of transport, and satisfied this need by the invention of the automobile. We call this the »Faster Horse effect«: The users are not able to tell us their real needs; maybe because there is not yet a solution for these needs. They also cannot provide us with the solution for the problem. They simply give clues that we have to learn to decode.

The users will not provide a solution to the problem

As it is so important, we want to repeat it: The users will not hand us our innovative solution for the problem (or our product idea or service invention). No doubt about it! We learned that relatively quickly, and our customers and project partners realize it regularly when they ask for solutions in their first interviews. The answers and ideas of the users are very obvious because their imagination and their desires are limited by their experiences. They usually think along the lines of existing solutions from their everyday life. Furthermore, they are not up to date with every technological development. Remember: Users do not tell us anything that we would not have come up with ourselves.

Humans are badly suited to describe their own behavior

Humans are very contradictory in their thoughts and actions.
They...
...do not always *do* what they *say*.
...do not always *say* what they *want*.
...do not always *do* what you *expect*.[*3]

Humans do not tell or even know every variable and the whole background of their actions. This is what we have to uncover. The statement of our interview partners are only the tip of the iceberg. We have to realize this and to dig deeper. We also need empathy for the users, because otherwise we were not able to interpret their statements properly and to abstract insights from them. *Insights* are thus the hidden needs and backgrounds that the users cannot name precisely.

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1 See section 5.3, Basic Tool #3, Interview Techniques.

2 This quotation is repeated in numerous guidebooks and Internet memes, but there is no certified original source. We like it nonetheless, even if it may just be an invention as the following blog entry states: *bit.ly/1SGCT7v* (06/26/2016).

3 These statements are based on IDEO and the HPI School of Design Thinking.

Humans align their answers to the expectations of others

Remember our discussion on social desirability. There is no general rule about what is right and what is wrong or how we proceed if we reach this point. We simply have to follow our gut feeling.

Sometimes it is helpful to reveal something about ourselves. We always have to talk to the interviewee on par. If we talk about ourselves, we must not make the mistake to influence our interview partner. For this reason, we also never recommend an answer to one of our questions.

Humans subconsciously accept problems and flaws

When we bluntly ask the users about their problems and needs with regard to a specific topic, there is a high probability that we will later state, »The people did not have any problems. There are none!« This is natural as people do not continually think about problems. Things simply are the way they are. People accept them and do not think about them any longer. In reality, we can find problems and needs everywhere. We only have to ask the right questions.

We do not create interview transcripts

To avoid waste of time, we never create word-by-word transcripts of interview. After all, innovation development is not science but professionally deployed intuition. Any information that we cannot extract from the inspector's rough interview minutes by our gift of interpretation are lost. This is a good thing, because text without voice, actions and any other context is useless. Transcripts are valuable for scientists, but not for us as innovation developers. Besides, the effort-to-yield ratio is unreasonable.

We use qualitative interviews to look for phenomena unknown to us. According to our experience, there are nearly no new insights to be gathered after 15 to 20 interviews. At this point, we have thus probably already made any relevant discoveries for the solution development in the CREATE module; at least the discoveries that are possible in the current state of the project. For this reason, 20 qualitative interviews are a good upper limit for a balanced effort-to-yield ratio. We only go beyond this limit in rare exceptional cases. A look at the world of science confirms our approach: In sociology, there is the concept of »theoretical saturation«, which happens when a theory is sufficiently verified by quantitative data collection. However, if we re-execute essential parts of the EXPLORE module, we have to conduct further interviews because due to the advanced state of the project we now have more specific questions.

GOOD TO KNOW

1 Jan Kruse: *Qualitative Interviewforschung: Ein integrativer Ansatz,* Weinheim/Basel 2014.

Variations of the qualitative interview can also be found in journalism and in traditional market research, e.g. in focus group investigations. It originates from empirical social research. In the early 1960s, this method was used in Chicago by the founding fathers of the »Grounded Theory«, Ansselm Strauss and Barney Glaser, in order to research internal thinking processes about external observations. In a scientific context, all verbal interview techniques are summarizes under the concept of the »qualitative interview.« Their various forms are organized into the following categories: guideline interviews, narrations (narrative or episodical), group procedures, intensive interview and receptive interviews. Jan Kruse from the Institute of Sociology at the University of Freiburg has written a good methodological book on qualitative interview research.[*1]