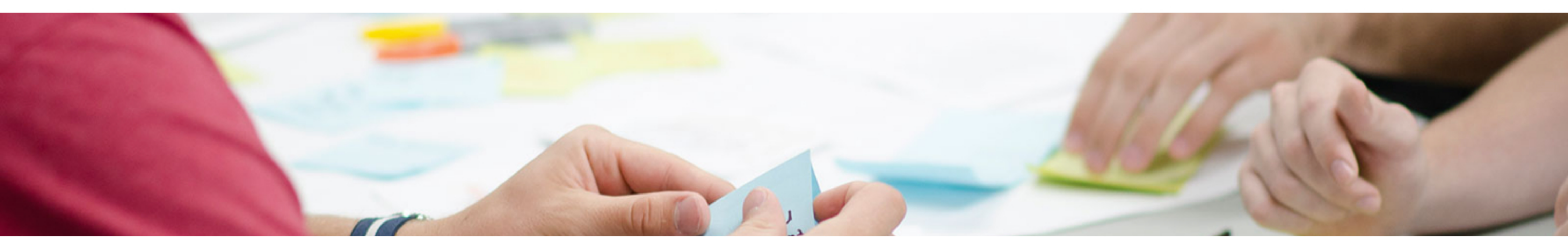

Tips for capturing the best data from user interviews

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user research | user-centered design | usability | tools you can use | communication tools and practices

User research is part of every project we work on at 18F, and interviews are a core component of that process. In this blog post, we've detailed some of the steps we take to help capture the best data possible when conducting interviews. This post is intended as a guide for people who need to conduct user interviews and for people simply curious about how we work.

Interviews are, at a minimum, an opportunity for you to ask your intended audience about their expectations, what their needs are, and to get direct feedback on the work you've done so far or on what you plan to do. But an interview is only as good as the data you get out of it.

While note-taking during user interviews might seem straightforward, putting some thought into the process can help you gather the most useful data. There are a number of things one can do to ensure the most useful information makes its way back to your team for further analysis. Below is a list of ideas and practices for note-taking during interviews to maximize the information that comes out of them.

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1. Know what you want to capture

The key to taking notes during user interviews is capturing the right information. And capturing the right information, if you're not prepared, can be harder than you might think. It's important to gather the interviewee's behaviors, attitudes, and experience with the set of tools or problems you present in the interview. This is because the information gathered in a user interview will be used later in the process to answer questions and solve problems as the product is being built and finalized. This means that you don't have to act like a court stenographer and transcribe everything said by everyone in the room. Instead, **you should capture only the quotes and parts of the discussion that are relevant to your research**.

Being comprehensive will take on a slightly different meaning in these situations. However, that's not to say you should ignore everything else. If it's your first time taking notes during an interview, you'll likely be eager to capture everything and miss nothing, which could lead to you furiously taking notes but still missing context or the nuance in what a subject is saying.

If you go into a interview knowing what information you're looking for, you'll know what to capture in the written notes and spend less time on bits of information that are less relevant. Having this confidence won't just make the notes more useful, but might also remove distracting elements.

2. Get your questions ready

Have prompts ready before you go into the interview to understand what you need to capture. It's good practice to write your prompts down — it will keep you from forgetting them and will keep you on track. You'll want the interviewees to feel comfortable while making the conversations you have be as productive as possible, so having to pause often and say, "*um, there was something else I wanted to ask but I'm forgetting*," can make things more awkward than having to glance at a notebook from time to time.

3. Designate a note taker

If possible, have a dedicated note taker who is not also the dedicated interviewer. Make it possible for other people on your team to hear or observe the interview. Using Google Hangouts, appear.in, or a simple conference service can help facilitate this and keep the number of people physically in the room to a minimum. Allowing others to get a feel for the mood and tone in the room during interviews can help put notes into context later. Designating a note-taker can also be a good way for someone to become acquainted with user research if they are new to the field.

4. Use and prepare tools to make note-taking easier

Capturing notes in places like spreadsheets or other types of electronic forms can help you stay organized and act as a cue for what areas you still need to cover. Practically speaking, this means to capture interview notes into the cells of spreadsheets where questions and prompts are preloaded into the columns. If you're spreadsheet averse, simply using the interview guide you prepared as a note-taking template can be helpful as well.

5. Capture verbatim notes and interpretations separately

When capturing interviews, be clear about when what you're writing down is your interpretation versus what the subject actually said. For instance, when you observe a person to be happy or uncomfortable with an idea and you write that down, denote that interpretation by placing brackets around the text. When you can, capture direct quotes and use quotation marks to communicate that the text is from the subject verbatim. Direct quotations are very useful. In addition to them adding reliability to the information gathered, they also help people understand the context and mood in which things were said.

6. Make analysis easier by annotating along the way

Star or otherwise highlight quotes or observations you think are valuable so that you can easily find them later. Midway through a project, you can often start tagging observations with themes as you write.

7. Don't forget body language!

Noting non-verbal signals can be very helpful when interpreting quotes or paraphrases. When the interview participant says, "Well, that was fun!" the quote means something very different depending on whether the words are accompanied by a smile or a sigh. Smiling, nodding, pausing, tensing up, or gesturing quickly are all examples of non-verbal signals that help us interpret what an interviewee really means. Feel free to note the body language you're witnessing along with what's actually being said, and if you're unsure about how a person reacted to the interview questions, talk with teammates who observed the interview along with you.

8. Consider privacy from the beginning

If your notes are going to be visible to your entire organization, take a moment to think about whether there is personally identifiable information (PII) in them that's not absolutely necessary. Be sure to strip out any PII as soon as the research phase is completed. This is especially true if you're researching a subject that is sensitive or potentially stigmatizing. One common practice is to separate PII from notes by putting all the contact information in a separate spreadsheet and labelling notes with pseudonyms or code numbers. Make sure to scrub the body of the notes for any specific references which could de-anonymize them, such as place of employment if they work at a small company. Clearly specify in your notes, at time of writing, any information that participants want to keep confidential. It's easy to forget to do this later, and you don't want to make mistakes.

9. Be cool

If you get behind, don't get flustered. Even seasoned user researchers will have trouble keeping up with all the information coming in. While it's hard to solve this particular problem for everyone, doing your best to be prepared will help you efficiently capture everything you've set out to collect.

10. Do your best to not cause distractions

Try to keep a low profile and try not to distract the interviewee or interviewer. Especially try to keep laptops and typing as inconspicuous as possible. If you're in a position where you're both interviewing and note-taking, try to make sure the laptop doesn't form a barrier between you and the interview subject.

11. Be sure to debrief

Work with the interviewer to identify key takeaways immediately after the interview. While the interview is still fresh in your mind, talk about the things that you found pertinent or interesting, and record these as such. Also record follow-up questions or document and material requests that the subject offered, and note whether these are forthcoming or you've already received them.

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18F staff is distributed across the country and the majority of our research has been and will continue to be facilitated remotely. We are sharing our experience to help guide designers and researchers as they adapt to new ways of working and provide some additional considerations to keep in mind while conducting research in critical times.

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Build empathy with stakeholder interviews, part 2: Conversation

In the first post of this series, I covered what stakeholder interviews are, why they're valuable, and how to prepare for them. In this second post, I'll cover how to actually run the interviews as well as some tips for synthesizing and socializing what you learn.