

# 5

## Contextual Interview Interpretation Session

Rapid CD Process	Lightning Fast	Lightning Fast +	Focused Rapid CD
Contextual Interviews and Interpretation	✓	✓	✓

Once you have completed an interview your next step is to share it with the rest of your team in an interpretation session. Contextual Interviews produce large amounts of customer data, all of which must be shared among the core design team and potentially with other stakeholders: user interface designers, engineers, documentation people, internal business users, and marketers. Traditional methods of sharing by presentations, in reports, or by e-mail do not allow the people tasked with building the system to truly process the information or bring their perspectives into a shared understanding. Contextual Design overcomes this by involving the team in interactive sessions to review, analyze, and capture key issues revealed by the customer data.

An interpretation session occurs within 48 hours after the field interview and is best conducted by a cross-functional team chartered with designing the system. During the session the team hears the story of the field interview and “captures” key issues online, which later will be built into an affinity diagram (see Chapter 8). All forms of Rapid CD will perform interpretation sessions. If you are using Focused Rapid CD you also will be capturing your sequence model (see Chapter 6).

No preparation of the data is necessary before the interpretation session if you interpret within 48 hours. Remember, don’t talk about the details of the interview before the interpretation session to keep the detail and your enthusiasm fresh.

This chapter defines the interpretation session and guides you through running the meeting.



### Guidelines for a good interpretation session

Any good meeting has a clear focus, clear roles that people have to play to make the meeting work, and a set of cultural expectations that ensure that the meeting progresses successfully for both the tangible outcome and the people involved. Here are the rules of the interpretation session that make it a highly productive meeting.

- Create a safe environment for everyone to take part. This includes:
  - Encouraging the quiet folks to speak their “silly” ideas.
  - Helping those who talk too much to manage themselves by keeping a pack of Post-it® notes to write down their ideas. Then they can check to see if no one else brought up the topic or point and bring it up after others get a chance. Often they can learn that the same issues will be raised and that they can control their own participation by writing down the idea so they won't forget instead of sharing it right away.
- Watch for chaos:
  - Signs include rising noise and rising tension.
  - Stop the meeting to sort out the issues clearly for the team instead of bulldozing ahead.
- Make sure you are still following the mainline conversation—what happened with this one user and nothing else.
- Don't allow the meeting to veer into design conversations. This is not the time to develop design ideas. Just state the design idea so it is captured as an affinity note, and then move on.
- Make sure everyone is heard.
  - If someone does not feel heard, they will repeat their point frequently.
  - Handle this by writing the point down, either in the affinity notes or as an issue for one of the models.
- Watch the pace of the meeting.
  - Slow meetings are boring, less creative, and harder to track.
  - Keep the pace moving by moving the team from issue to issue quickly.
  - Have the goal of finishing each interpretation session in two hours; pace yourself.
  - A slow notetaker slows the entire meeting; if someone is agonizing over words or struggling to keep up, move them off that role. (Remember, it's not a statement of personal worth, simply an inborn skill.)
- Arguing is never productive.
  - Decisions should be based in user data. Arguments often arise when you simply need more data.
  - Sometimes people want to know what happens next in the process but you don't have the data; avoid hypothesizing the future.
  - Sometimes interviewers just don't know why something happened; make it a question and avoid hypothesizing what might have happened.
  - Arguments often result when people are concerned about two different issues. Clarifying the issues can help people see how their issues are different and compatible. Alternatively, write down both issues so you can move on.
  - Don't argue over word definitions and choices. Write what you mean (see examples) in plain English. If it persists, give yourself seven minutes to discuss a definition then move on.

Because of your promise of confidentiality you want to associate the user code and number (for example U01) with the user profile, not the user's real name and organization. Maintain a separate document matching the user's actual name and company to the user code to protect confidentiality.

Using a user code encourages the team to maintain the confidentiality of the user whenever they are talking about them to others. And it also gives you a way to track different market segments or user contexts if you want to see how this data clusters. So if you are studying urban and rural environments you may have U01 for urban and R02 for rural; the letter code represents the context and the number code represents each user interviewed.

## User profile

The user profile includes demographic information about the user's job and the roles that she plays. For instance, you may want to capture the user's job title, responsibilities, and other demographic information. Depending on your project, you may also want to capture training levels, system use, and knowledge.

### Example: eChalk

Here you see one of eChalk's user profiles. You can see that it was important to this team to know what kind of teacher the user is, how long he has been teaching, the kinds of classes taught, and the software and hardware available and used. This team decided to capture teachers' ages to be sure their interview spread covered people in different age groups to see if there was any relationship between that and comfort with technology.



### U09 Profile

- Works at Org 4
- Current Position: Computer Teacher in a middle school. Teaching for 3 years; teaches music and computers.
- Number of Students: 8 core students (computer club—informal/kids drift in during free periods (subs in class go to the computer club) creating flash, help him with special projects
- Teaches 4 computer classes, 5 music courses, computer tech class, and Vanguard class (high achiever's class); Computer class = web page design
- Only uses MSIE—web pages look better in IE than in Netscape
- Best guess of age: thirty-something (35?)
- Lab: 32 computers in the room—partial T1 line used in the classroom for connectivity
- Applications: MS Office (used at beginning of semester—mostly interested in designing web pages)
- Fiber optic cable is used for the telephone system
- Software: MS Office (Excel), MS Works (easier), MS Access, Flash, Hyperstudio (Kids PowerPoint app), Compton's, Encarta, Groliers (CD-ROM), Web games (Pac Man, Space Invaders, Pong, Solitaire), Photo Image Ready, Photoshop

User profiles can be captured in the User Information window of CDTools. If you are not using CDTools, user profiles should be captured in a word processor. Capture the

profiles in a separate document from the affinity notes. Usually it is easier to have one document that has all user profiles. (See Chapter 3 for a description of CDTools' User Information window.)



**Example: Agilent user profiles**

Note that in this project, the team was interested in the difference between their two primary markets: chemical labs (often petrochemical) and pharmaceutical labs. To track these differences, their user codes start with C or P, respectively. Commercial analytical labs, doing tests for others, are flagged with U.

**U02:** Has been at Org7 for over two years. Does analyses of in-testing support of stability samples. Writes SOP, IQ (In-process Qualification), and OQ (Operational Qualification). U32 calibrates and maintains instruments. Has a BS in Chemistry with some graduate work.

**U03:** Has worked at Org7 for two years. Has a BS in Biochemistry, MS in Biotechnology. He has the title of R&D Chemist. He came from Ireland and both degrees are from Ireland. He came here for an apprenticeship and decided to stay because job market is bad in Ireland.

**Example: Apropos user profiles**

**U04:** Part of the Advanced Group support team, U04 handles help and support calls for one of Org01's products. Her goal is to solve problems without sending them to the Escalation Group. She also monitors a chat room where Level 1 technicians can ask questions about problems they cannot answer. She provides answers and solutions to these reps via the chat.

**U05:** Part of the Escalation Group, supporting one of Org01's products. He will not take ownership of issues until the Advanced Group has tried everything they can. He is the last direct contact with the customer, although he will discuss issues with engineering, and push bugs to them.

**Example: Purchasing user profiles**

**U4:** Female, in her 30s, working in Germany. She is an operations purchaser—the person who sets up and manages the relationships between an automotive OEM (the auto manufacturer) and suppliers. She has worked at this OEM for three years, but is still considered a new hire. She is a power user of SAP; she trains other users and is first-line help.

## Organization profile

The organization profile includes a generalized description of the organization's business and its industry. You may want to include the number of employees, locations the organization operates, the number and kind of products they use, or the services they contract for. Recording an organization profile is not required, but it is a good way to keep track of the types of organizations from which you collected data.



**Example: eChalk**

Here's the profile for User 09's organization. You can see that some school-wide technology was captured here.

- Public school in New York City
- 1750 students grades 6–8; one of the top 40 schools in the city; 2,500 different countries represented by student population—heavy Russian, Chinese, Spanish population; Russian is the biggest challenge in the school (lots of students have Russian as a first language)
- 45 special needs kids in the school; students from outside of the school can apply
- Altaris is their network mgmt. tool; Using NetZero as their ISP
- Hardware: Dell Power Edge 4300 network server

Organization profiles should be captured in the Organization Information box of CDTools. (See Chapter 3 for a description of CDTools' User Information window.) If you are not using CDTools, organization profiles should be captured in your word processor. Capture the organizational profiles in the same document as the user profiles. You can then use this document as a reference during the affinity building described in Chapter 7.

*Tip: It is a good practice to also include the interpretation session participants' names and roles played in the document that holds the users' and organizations' profiles. This information can come in handy during affinity building. In CDTools, capture session participants in the Notes Session window.*

#### **Example: Agile organization profiles**

**Org7:** The company produces pharmaceutical and nutritional products and performs R&D development for larger pharmaceutical companies. The focus for their own products is in development rather than research. They were acquired six years ago by a Japanese company. Their consumer products are sold by multilevel marketing. They follow GLP/cGMP procedures. They are building an additional plant. When it is complete, they will be in two buildings—one pilot and the other development. The new buildings will be pharmaceutical only. They do small scale production at one location but the scaled-up work is in another location.

The types of drugs that they work on include antihypertensive, Alzheimer's, cardiac maintenance drugs, hypnotic sedatives, and calcium blockers. Some methods come from the client, but they would like to have the latitude to change them. There were at least ten chemists during the shift. Management trusts the chemists because they are professionals. They went GMP three to four years ago. They separated the pharmaceutical and nutrition product, because nutritional products do not need GMP. Equipment in the lab includes a lot of Shimadzu LC and HP Vectras.

#### **Example: Apropos organization profiles**

**Org 01:** A software company specializing in storage and backup tools. The call center handles sales and support calls. One of their goals is to avoid putting callers through a telephone menu system, so they employ "dispatch" agents who send the calls to the appropriate queue with sales or support. Within support, their levels are: 1, Dispatch; 2, Level 1; 3, Advanced Group; and 4, Escalation Group. The escalation technicians are the last level that talks to the customer—they will discuss problems and bugs with engineering, but engineers rarely talk to customers.

#### **Example: Purchasing organization profiles**

**Org 2:** A maker of small, high-priced, prestigious sports cars. This company works with many suppliers to provide all the different parts of a car, but is working to reduce the number of suppliers they have to work with. They maintain tight control over all parts made by their suppliers. They have suppliers they work with regularly, but will add new suppliers to serve special needs. Suppliers must manufacture parts to Org 2's schedule and quantities.

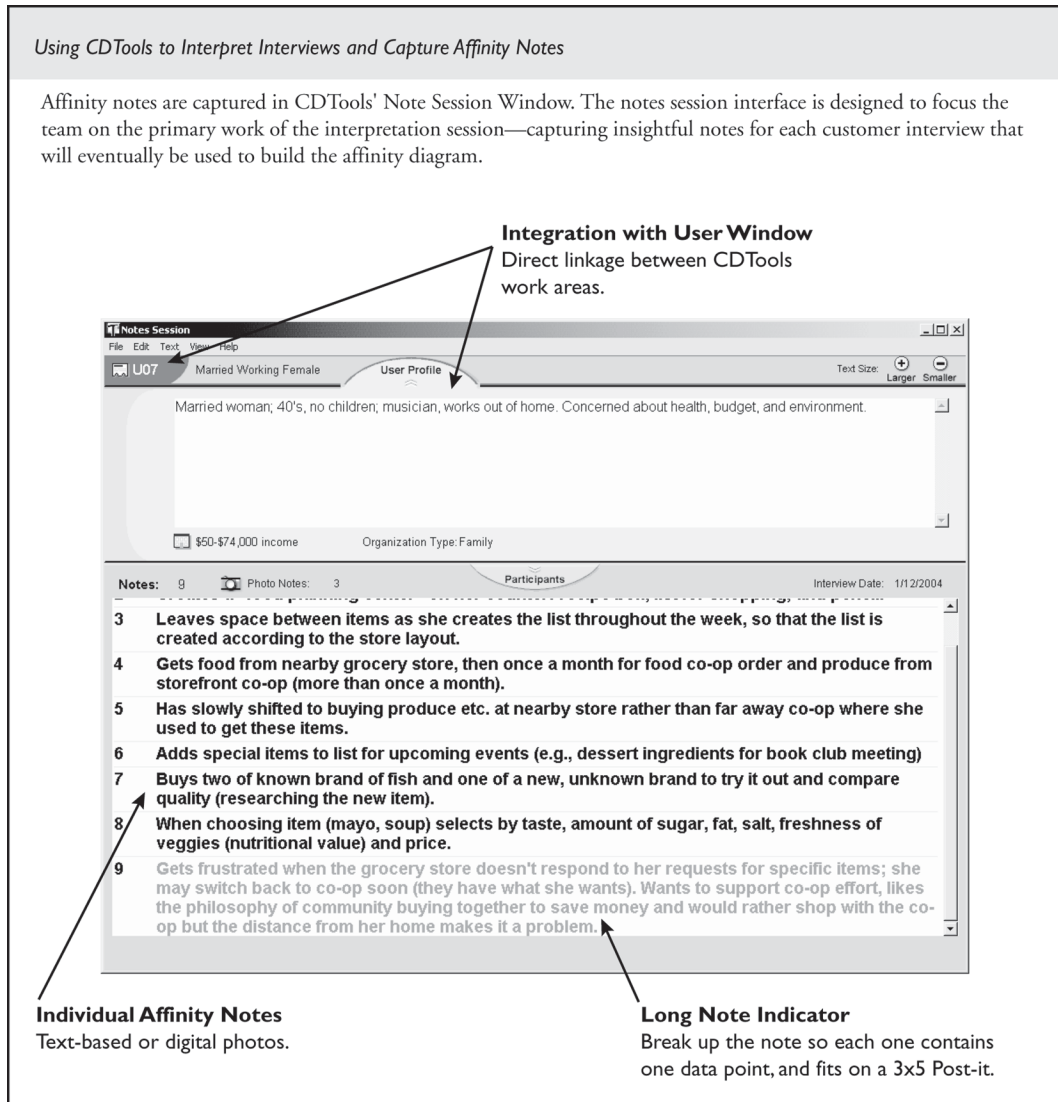
## **Capture affinity notes and work models**

Once you have finished capturing profile information, begin the interpretation session proper. Capture affinity notes in CDTools (see Figure 5-1) or in a word processor. Project the affinity notes on the wall so all can see what is being recorded.

The interviewer starts by walking the group through the interview without summarizing or skipping anything. If you took photos of the physical environment show them now or draw a simple physical model (see Chapter 6), sketching the physical context in which the interview occurred.



**Figure 5-1:** CDTools interpretation screen used for capturing notes which will be used to build the affinity diagram.



The interpretation team interrupts and asks questions about what is happening at each stage of the interview, but not about what is going to happen next. Interviewers will remember more accurately if they do not skip around in their notes.

The goal of the interaction between the interviewer and the rest of the group is to maintain the right level of tension between letting the interviewer tell the story and probing into what happened. The interviewer shares what happened in order, the group pushes to get to the detailed “what” and “why” behind the user’s actions. Doing so leads to effective interpretation and high quality affinity notes.

During this process the notetaker’s role is to capture the key ideas emerging from this discussion. When the interviewer emphasizes a certain point it implies that it is worth capturing. When the participants probe for a point or offer an interpretation that is confirmed, it again implies an affinity note to be captured. The notetaker is the central listener, capturing both implied affinity notes and those the team directs him or her to take (see the box, **What to record in the affinity notes**).



### What to record in the affinity notes

#### Do record:

- Interpretations of events, use of artifacts, problems, and opportunities
- Important characteristics of the work
- Breakdowns in the work
- Cultural influences
- Design ideas (flag with DI:)
- Questions for future interviews (flag with a Q:)
- Insightful customer quotes

#### Don't record:

- Demographics; put them on the profile as part of the user description
- Other information represented on work models

Periodically the notetaker will stop and remind the team to look at the affinity notes and make sure they are correct. Each affinity note should contain only one thought or point with clear references to who said or did what (see the box, **Grammar does matter when capturing affinity notes (sort of)**). Each note eventually must stand alone during affinity building. (See the note examples on pages 117 and 118.)

### Grammar does matter when capturing affinity notes (sort of)

It is not necessary to be a professional writer to write affinity notes, but you do have to write them well or as well as possible. Remember, these affinity notes represent your data and your team; other people are going to be reading them. Bad grammar and poorly written text gets in the way of understanding and interpretation. It also wastes time when you are building the affinity. A good notetaker can write succinct affinity notes with enough description to stand alone. A good practice, particularly if you are going to present your affinity to your customers, is to edit the affinity notes for clarity before you build the affinity. You can use CDTools' spell checker and other editing features for cleaning up the notes.

In addition to general affinity notes, the notetaker also captures notes describing user issues and behavior. Other notes captured during the interpretation session are:

**Questions.** When the team gets bogged down over a question that the interviewer can't answer, the notetaker captures it in the affinity notes and encourages the group to move on. The act of capturing the question raises it as something that everyone needs to pay attention to in the next interviews.

**Design ideas.** Ideas for solutions that team members come up with are captured both to ensure they are preserved and again to encourage the team to move on and remain focused on extracting the relevant data not working out a design idea.

**Good user quotes.** Capture these as "quotes" to use later when you are communicating to the rest of your organization.

**Interpretations.** The team will hear the data and draw interpretations of how it represents a work pattern, or implies an inner experience. These also are captured as long as they ring true for the interviewer.



Table 5-1 contains Dos and Don'ts for capturing affinity notes. Try to avoid the Don'ts during a session, but remember you can always go back and edit the notes to clean them up after the session if you want to.

Table 5-1: Tips for note capturing during the interpretation session.

Dos and don'ts for capturing notes	
Don't	Do
Be vague or use non-specific pronouns.	Be clear, make sure you identify who you are talking about in each note, watch your pronouns e.g., she told her that he said to ... , A few days after you capture a note like this you aren't going to remember who she, her, and he are. Use user numbers, job titles, or some other identifiers so that you will be able to sort out the players late.
Use jargon that is familiar only to your team.	Use common terms to describe the work. Business people, marketing, etc. may not be familiar with your shorthand. Be careful not to exclude them from gaining the most value from your data.
Refer to the user or organization by name.	Remember, your users and their organizations are supposed to be anonymous.
Overload a note with too much information.	Keep different points separate or you will have to go back and create new notes when building your affinity. You also do not want to lose nuances by putting too much in a note.
Write sequential notes.	Write notes that stand by themselves. Notes you capture in an interpretation session will be sorted and printed for the affinity. Each note needs to stand on its own.
Capture sequence model steps.	The steps are captured in the sequence model itself. If there is a distinction that the step reveals, capture that in the notes.
Capture demographic information.	The user or organizational profile is the place for demographic information.
Spend time speculating on the answer to a question when the interviewer doesn't know.	Capture the question as a note starting with "Q:".
Capture facts only.	The note will have facts, but the more important data is why a fact matters. Capture your interpretation and the fact.
Wordsmith a note or argue over definitions.	Don't waste time arguing over a specific word. Sometimes capturing multiple words which are similar with slash marks between them is faster than picking one. If you find yourselves arguing over core definitions, hold a separate definition session to define the key concepts you will use and what they mean.

As a general rule of thumb, 50 to 100 affinity notes should be captured for each two-hour interview. If you are getting fewer, check that the interviewers are recording all their observations. If you get too many, check whether you are capturing every step in a task or trying to describe things in notes that are better captured in work models.



eChalk notes	Analysis
U01-04 He is the network administrator for the school (sets up systems in the school, and connects them to the network.)	This note may look like demographic information, but it is important that eChalk capture in their affinity the different roles that teacher's have to play around technology.
U01-11 He can't answer questions verbally, teachers want him to come and show them. Verbal exchange can quickly lead to breakdown if the teacher is not technically savvy.	This note is o.k., but could be even better because it contains two points that could be in two separate notes. The first point is about how teachers need to be shown what to do, not just told. The second point is that when teachers are not technically savvy, they don't have a frame of reference to understand what they are told.
U01-49 He is frustrated by Board of Ed. filtering i.e. can't get to NASA.	This is a good example of a note capturing a cultural influence.
Q: Does U1 use computer at home for work because not getting what he needs at school (connectivity, filter)?	This is an example of Question note. The interviewer couldn't answer this question about U01, but now the entire team will be watching out for similar data in subsequent interviews.
U01-67 Sends surveys home to parents to learn what technology they have at home.	This is a good note that stands alone on its own. The team did more than capture the fact that surveys were sent home; they also captured what the survey was used for.
U01-68 DI: Templates for surveys of all kinds for school/teachers to use. Targeted for internal use by type or general public use.	This is an example of a Design Idea note, generated in response to the data in the U01-67 note.
U01-90 He likes At Ease.	This note will not work well in the affinity. Why does he like At Ease? In reality, the team captured several specific notes about U01's use of At Ease; this specific note doesn't add any new insight.
U2-01 Elementary students have to learn computer skills—principal dictates how far these standards have to go (list of topics by major curriculum areas—topics that have to be completed by the end of the year—each state has tests to test whether the teacher/class has met the standards).	This note could be broken into three notes since it contains several important points. Note: Elementary students have to learn computer skills. Note: The principal dictates how standards will be met (list of topics, topics that have to be completed). Note: Each state has tests to test whether the teacher/class has met the standards.
U02-4 Uses log book (print matter/hand written). Teaches 27 classes so this book keeps track of where each class is and where she left off.	This is a good note. The team didn't stop at capturing the fact that a log book was used; the important point is that the teacher has to track where each class is and where she left off.
U02-26 Is focused on making technology a part of the school's existing curriculum (math, English, etc), not a subject unto itself.	This is a good note, and potentially very important to the team's design. If this data is found with other users, the team will want to take advantage of the integrating technology in any lessons, not just computer class.



**Example: Agilent affinity notes**

C2-05 Her life is like a waitress trying to keep up with all her ‘tables’ (tests) in progress. This is memory intensive—things are easy to forget.

C2-07 She uses an alarm clock to remind her of when the pH analysis will be done.

C12-21 Samples tend to come in waves: “we just had a tidal wave this morning.”

P4-23 Had to sneak up on someone with notebook and SAT to get another chemist to verify his results and calculations.

P10-25 Has his own organization system for lining up samples on the bench to be worked on.

C15-08 Charts on the wall represents each analysis; that’s why there are so many of them. Each one is one instrument, one column, one method. Charts are graphed.

U3-23 “If I had to run back to the LIMS terminal every time I get a result it would drive me crazy.”

U5-16 They used to have a validation process for LIMS entries before sending to control room, but don’t anymore because they don’t have time.

**Example: Apropos affinity notes**

K08-21 K08 gets calls from field reps who call her to get transferred to their sales rep. They can’t access their sales rep’s contact information from the web site.

K02-11 Says that his supervisor watches his activity and if he is not grabbing calls quick enough he will push calls to him.

K02-32 Discusses priority options with the customer and the customer decides the priority of the case.

K02-33 Q: How does self rating of problem affect the queues? Can the agent try to talk the customer down to a lower priority?

K04-78 DI: Automatic text paging to the responsible person. System extracts the information and automatically sends the page based on the priority of the interaction.

K07-94 Before sending the caller to sales K07 brings up Apropos and enters identifying information about the customer. He then sends the call to sales. Doing so provides sales with information about the caller before they pick up the phone.

**Example: Purchasing affinity notes**

M02-33 An RFP is about a 100-page document with multiple sections.

M06-34 It is an open-ended agreement; it’s not a purchase requisition. It will lay out terms and costs, not quantities and other details.

M06-35 Different members of the team are responsible for different sections.

M08-46 She doesn’t want to eliminate losing vendors, because they could partner with other vendors to meet her team’s needs.

M08-48 DI: Outside aggregators could put competing vendors together to make deals, by knowing their technology.

A03-5 Says that if they have already worked with the supplier, they will keep a checklist of how the deal went.

A03-46 Sends suppliers a questionnaire asking for information on their financial condition, the likeliness that they will be bought (the OEM fears losing their sole source supplier), what other OEM’s they work with, and their technical skills.

A03-47 The OEM has a fear of losing a supplier if they go out of business because 90 percent of their supplies are from single sources.

A03-58 It is easy to end a relationship with a supplier if you do not like them—the end of the production run provides a natural end to the relationship.