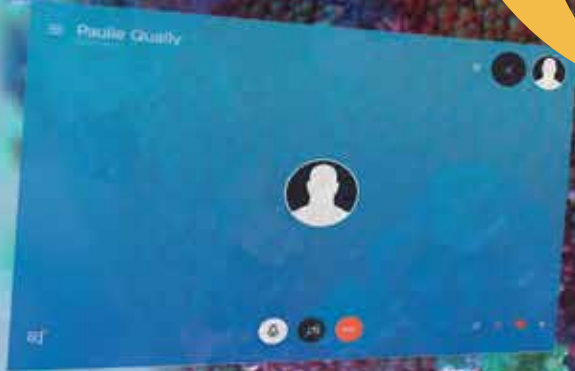


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By Kay Corry Aubrey

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Steve Portigal is among the best-known user experience researchers. He's the author of *Interviewing Users: How to Uncover Compelling Insights* and *Doorbells, Danger, and Dead Batteries: User Research War Stories*, a delightful collection of strange tales from more than sixty researchers that describes what it's like to go out into the world to study real people. Steve and I spoke recently about his work and how he sees UX research evolving as the field he helped create matures.

Kay: How would you describe user experience research to a market researcher?

Steve: I was thinking about the name because it's gone through a lot of names that get used simultaneously. Back in the early days, we used to call it "design research," and then it was called "user research." And right now, maybe "user experience research, UX research," is the industry term. That gives you a clue as to what we're talking about doing research on, trying to drive the design of a product or service, and trying to gather information that will help decisions about what that experience is going to be. It's foundational information, like what need a group of users has, or what opportunities that we, who are making a thing for those users, have. Maybe it's evaluating the



STEVE PORTIGAL ON THE KEY SKILLS OF A USER EXPERIENCE RESEARCHER

prototype as a solution. Is this something that people can use successfully?

One thing that characterizes user research or UX research is a strong impulse to at least try to get out of the building, to get to people where they live, and to understand what that experience on the ground looks like. We want to answer these kinds of business questions that we're all being faced with.

Kay: *What are some of your techniques for exploring the user's world?*

Steve: It's most important to go into their context, so to go to homes and workplaces. Sometimes we're just having a meeting. We're just having a conversation. The research itself may not be about "show me what's in your fridge" or "show me how you go through this task." But even just being where people are, going to their office as opposed to asking them to come to my office, sets up a dynamic in the conversation where I'm there to learn from them. There's a message you're sending about how you are curious and trying to just be in their environment and walk in their shoes, as they say. Of course, if you want to see their artifacts, see their tools, see their process, see what is there that you wouldn't know, that you'd want to ask about, being there is essential for that. I like to have, probably the technical term is, "semi-structured interviews." So, I have things I want to talk about, but I also let the conversation go where it's going to go, a kind of balancing act between directing it and seeing what emerges. This is very much driven by my objectives, but very much reactive to what themes and topics get revealed, and what turns out to be important for this person.

Conversation is the main technology—asking questions, listening, following up. That gets called a lot of things.

When they give you cues by the language they use, you incorporate that language in your questions. You're setting up a dynamic with them where there's some trust and where your questions are not putting your frame on things too much.

Sometimes it is called "ethnographic research," but I'm super nervous about using that term because someone will always tell you, "Well, that's not ethnographic because of this, because of that." So, I try to stay away from the methodology jargon, but talk about things like interviews or conversations, or just being with people face-to-face. Try to be open-ended and let their story and context guide you in reaching the objectives you've come in with.

Kay: *How do you know when you've gotten the full story?*

Steve: Oh, that's the question, right? [laughs] I've fallen back on, it's not a great measure but, this idea of spider sense, like "Spidey." You have to hone that spider sense. The naïve researcher will ask a question, document the answer, and go on to the next question. In a great interview, it all comes out in the follow-ups. Hearing what is said and hearing what is not said. Often you ask a question and you get an answer to a different question. And so, you realize, oh, what you thought you were asking about, and what they heard, is different. That provides you an opening, an area to explore what their response meant and see if you can circle back to get to what you thought you wanted to learn. But it's all this follow-up, it's making trade-

offs in the moment, what people don't say, and how they respond.

Sometimes they are hesitant or sometimes they are exuberant, so they'll give you all these cues, a kind of energy, which is much better to see when you're sitting in a room with somebody than when you're on the phone or over a remote connection. You can deduce that so much better when you're in the same physical environment with them. I always think about how you're going down these trailheads. You have to keep thinking about, "Did you get to the end of that trail?" It's almost like part of that spider sense is knowing in your head, "Oh okay; I got it, I am pursuing my own understanding, and I think I finally understand. If I wasn't doing this interview, I could probably restate what I think is a small truth about this person, or the whole story, and you're saying, yeah."

Kay: *As you listen to the person, how do you know your understanding of their world view is accurate?*

Steve: You have to go into the whole interview being interested, letting go of your own need to have the world be a certain way. In all the questions that you ask, you are trying to use their language in the way you ask the question and to not introduce jargon. When they give you cues by the



language they use, you incorporate that language in your questions. You're setting up a dynamic with them where there's some trust and where your questions are not putting your frame on things too much. I mean, it's inevitable. It's unavoidable, but you're doing it in kind of a gentle, curious way. Think about what your body language is and what your tone of voice is. You can say something the way that you understand it, but you're inviting them to criticize, challenge, or dismiss it. So, the whole dynamic is like that. Then you're more able to say, "So, if I understand properly, it sounds like this and this and this and this, is that right?" But, you check in with them. And of course, you can imagine the bulldozer way to do this, where you're just making declarations at the person, which would be the misapplication of the technique. Having a dynamic where you are learning, listening, evolving, and inviting them

to support you in doing that, I think, can be effective.

Key: *How do you deal with situations where the client might have a vested interest in a particular outcome that the research is not delivering?*

Steve: I'll answer the counterpoint to that. Clients who have a vested interest in how the world is will see things that I won't see. I love having them with me despite the bias that they're going to bring, given their work. They will see things and be curious about things that I won't know to ask about, and they will interpret what we heard differently. That's very productive to digging in with the participants and then making sense afterward.

How do we do that in a way that helps them be successful? I put together little briefing worksheets, and I make sure to have a meeting with everybody beforehand and talk about, "Hey, here's how these conversations go. Here's what to do

and what not to do." Tactically, you need one person to drive the conversation. So that's me, that's the lead researcher. It's an 80/20 split in terms of question-asking. Driving the interview means you choose what topics we're talking about. So, if someone is telling me about their videogame habits and I'm asking all these follow-ups, I do not want this other person to say, "What kind of bedsheets do you prefer to purchase?" That moves the conversation into a completely different place. We've lost our flow and our ability to follow up. So, that person's been given a very specific role, which is to listen and think of questions, but the only questions that they are going to ask are about what we're talking about right now.

So, I set up that expectation. I pay attention to them. I can hear them shifting in their seats, or that breath they make when they want to interrupt, or have something they're thinking about. I'll either ignore them, or put it on hold for myself, and then turn to them when we're at a transition moment and say, "Do you have anything to talk about, anything you want to ask, about what we're talking about right now?" They might say, "Oh, I'd like to ask about bedsheets." And I'll just say, "That's a great topic, and we'll get to that in a little while. Is there anything about what we're talking about right now?"

So, we're talking about the interview in the interview with everyone together. This is a collaborative conversation. We don't have to whisper in front of our participant about what we want to talk about. I teach my clients a little bit to sit on your hands, right? To let me control where the overall flow is, and I will give you moments throughout to get to the things that you want to get to.

I've heard other researchers assign people very specific tasks, someone to

hold the camera, someone to sketch, or someone to type up notes. I think that's fine if you have a large group. For me, I really want my clients thinking about the conversation, thinking about the next question, and thinking about what they want to learn. Being really present in the interview itself is important because there's just so much value, to me, from how they do it, as long as I create some structure for them to be successful.

Kay: *This sounds like an extension of the Spidey thing that you talked about.*

Steve: Yes. Right, there's a Spidey sense of when the person next to you wants to talk.

If you do this with somebody, even like three or four times, you get this cool duo activity going on where you start to feel each other's rhythms without looking at each other. And that can be a nice collaboration. It's not about me managing that person to not mess things up. It's about us with a silent flow to drive the best interview possible. That's the ideal for me.

Kay: *And you're leading the client through a learning experience helping them to absorb new insights by making them part of the process.*

Steve: Yes. And it's even better when we've left their building and just having a different experience by going to somebody's office or home. This is not business as usual for them. They're trying mentally or emotionally to be curious and have a learning experience. Their ability to carry forward what we learn is more important than mine, or is more effective than mine, just given their investment.

Kay: *I have one final question before we wrap up. What's capturing your imagination these days in UX-land?*

Steve: I'm thinking a lot about user research and I feel like—this is very flowery language—but I feel like there's a new era dawning. I can feel the profession maturing around me where there's been a lot of work done, books written, and teaching happening.

I've been involved for a couple of decades around here's how you do this practice. Here's the process. Here are all the operational things at these different levels that are happening. Those are all good best practices, but we're getting smarter. We're getting more articulate and reflective. Some are conceptual things like, "Hey, we have a concept about culture that kind of drives how we do this, but let's have a deeper conversation." That's maybe a more intellectual evolution. There are even some things, such as the details of the practice, that I never heard anyone say five years ago.

Here's a concrete example. If you do any kind of participant research, depending on the relationship, there's usually some kind of consent form. But I recently read an article that made an obvious point in hindsight. It said, getting someone to sign a consent form

and having that person providing consent are not the same things. I mean, we call it "informed consent." This just stopped me. I was always focused on getting the signature on the form because that's a responsible, compliant thing to do. But that person took a very simple activity and leveled it back up. What does consent mean? What does the interaction look like? I'm just seeing so many of my own practices being challenged or evolving, refined with maybe a little more empathy, a little more compassion in them. It feels like as much as we built up a community of practice knowledge, there's more to be developed, and it gets me really excited. Maybe I'm the old guard, but I have a lot to learn, improve on, and contribute. The way the new guard is willing to challenge the status quo feels very exciting.

Kay: *Steve, this has been great. Thank you very much for doing this interview. And thank you so much for all your contributions to the field of qualitative research. It's been wonderful talking with you.*

Steve: Thanks so much. It's great speaking with you, as well. 🍌



User Experience Research Resources from Steve Portigal

Interviewing Users: How to Uncover Compelling Insights, Rosenfeld Media, 2013. Reviewed by George Sloan in *VIEWES*, Fall 2013, page 74.

Doorbells, Danger, and Dead Batteries: User Experience War Stories, Rosenfeld Media, 2016. Reviewed by George Sloan in *VIEWES*, Winter 2017, page 55.

@DollarstoDonuts, A podcast where we talk with the people who lead user research in their organizations, hosted by Steve Portigal. Available on Apple, Spotify, Stitcher, Android, Google Play, and RSS.