Business901

Podcast Transcription

Implementing Lean Marketing Systems

Introduction to User Interviews

Guest was Steve Portigal

Related Podcast:

Uncovering Compelling Insights

Business901 *Podcast Transcription*

Implementing Lean Marketing Systems

Transcription of Podcast

Joe Dager: *Welcome everyone. This is Joe Dager, the host of Business901 podcast. With me, today is Steve Portigal. He is the author of the recent book, Interviewing Users: How To Uncover Compelling Insights and is the founder of Portigal Consulting, a bite-sized firm that helps clients to discover and act on new insights about themselves and their customers. His research is based on hundreds of interviews from families to corporate executives and everything in-between. Steve, I would like to welcome you and mention that I am somewhat intimidated interviewing someone that has written a book on interviewing. Please, do not turn the tables on me!*

Steve Portigal: Why would you think that?

Joe: *Well, I have that funny feeling that it could happen.*

Steve: There we go. Thanks for having me.

Joe: *Is there an actual process in interviewing?*

Steve: There definitely is, and I think one of the factors about the interview as a technique, I think delightful and damning at the same time, is built upon everyday skills that we have; like having a conversation, like asking each other a question, like what we are doing right now, and so it's a little seductive. Well, I talk to people all the time, I'm a good listener. I can think on my feet. I can go

and interview people and learn from them and gain insights to help me develop products that sort of the first take on thinking about the process and to a certain extent that is true, and then sort of the flip of it is that there are some ways that to do the best possible work you can in talking to users that you do things very differently than what you would do in personal conversation, and it's the naive person that believes in their social skills in talking to people, but doesn't understand the elements of the process that are unique, that's where they kind of get caught up, and so if you follow your interpersonal instinct, it will take you only so far andit can kind of trip you up.

Joe: *The interview shouldn't be just a basic conversation. There has to be more?*

Steve: It's a really good way of putting it, and I think it sort of further complicated by the fact that when you, the interviewer, leave, the participant isn't necessary aware of that. The successful interview feels to the participants like they just had a great conversation with someone. Well, then one of the key difference is, as interviewers, we do a lot of listening. Meaning, if the conversation is kind of 50-50 between both parties, an interview might be, 80-20 or 90-10, where the larger number goes to the participant. So, when you think about it, no wonder they feel good. They got to talk a lot. They got too listened to. It was all about them. Aren't going to necessary feel like they've just been interviewed, even though you are making, as the interviewer, a lot of explicit choices about what to say and what not to say and when to say and not say things. That's kind of the process that you ask about before it really breaks into those sorts of aspects.

Business901 *Podcast Transcription*

Implementing Lean Marketing Systems

Joe: *I think this whole process is kind of fascinating now that people were starting to collaborate between organizations and in different departments; IT is talking to IT and operations is talking to the other guys' operations, and interviewing seems to be a needed skill set?*

Steve: One of my goals was this; is to try to raise the level of that. People can have conversations and their kicking the tires or they're filling out requirements questionnaires, and they are not necessary quick to hear what's not being said. The things that you don't know that you want to hear about. Those are the pieces that would separate sort of a gap filling solution to an innovative solution.

Joe: *When we talk about Gemba in the Lean world and Steve Blank in the Lean Startup talks about getting out of the building. Gemba is going to the place of work. I think you talk about it in your book that it is important to conduct an interview at the place of work or the place of the person you are interviewing. What's wrong with the phone?*

Steve: The phone is hard. So, I can answer, "What wrong with the phone?" and I can answer "What's great about going into the environment, going to them?" The phone is hard for someone when you haven't ever spoken to them. You don't get a lot of queues the body language queues about discomfort, excitement, engagement and even more tactically, the visual queues and the more subtle queues that say "there's more to the answer if you want to hear it". When you talk to someone, you don't really know if you've gotten to the end of the

response. When you've kind of sitting with some, you build up a little more exchange of pauses and breath sounds and eye contacts and head posture and those things helps get to what's difficult to say. If you're talking to some about a system work or could work or should work and there is an aspect to it that might reflect poorly on them, they are not necessarily going to be as easy to talk about it in a way that may acknowledge failure. Even though you're not looking to judge them or harm them and that insight is really helpful to think about what future solutions could be. That's a lot easier to gauge into, as an interviewer, to adjust your questioning tactics and come back to things later. Find ways to adapt how you phrase your inquiries. Those really powerful but very soft queues that you get face to face are really helpful.

The second part is all the bonus stuff you'll get by going to the environment. You get to see things. You get to see things that you wouldn't necessarily know to ask about, or the person is going to say: "Oh, well, I know we are meeting in this room, but let me walk you over here to show you this person, to show you this sign, to show you this artifact. Now, that you mentioned it, I wouldn't have thought about it if we weren't standing here talking about it. But here it is "viola" and there is some sort of insight to that and then what you, as an interviewer, can do in the environment is observe all the unstated queues. If you work with another organization, you mentioned IT to IT; this is probably not up-to-date language on this, but looking at how cables are tied and looking how racks are maintained, it is going to tell you a lot more about your counterpart's culture as an IT organization. Then, you know, some in it to the power point or whatever

kind of documentation you have. The post–it-notes that tell you how to do something or remind people in the lunch room. The art work the people have on their walls. Those are all indicators, again of things you wouldn't think to ask about, but can really provide a really richer understanding of what's going on in a home or an environment. They can really start to take you to a place where you have deeper more nuanced understanding of that situation in order to think about what the opportunities are for whatever you are trying to do or build.

Joe: *It adds context for me to get a deeper experience out of it or maybe ask better questions.*

Steve: Absolutely! I think that's what why one of the buzz word exists contextual research; that's what people call it sometimes. That element of context is the context of the person. It's the context of the environment and all those things.

Joe: *This concept of interviewing seems to be a popular discussion lately. Is it because we live in this digital world that we have to talk about it and kind of force ourselves to do it now?*

Steve: My theory and this isn't backed up by anything but just sort of anecdotal experiences is that this kind of research and insights about people that we're designing for seems to be sort of a half step, kind of a ride on the coat tail or a little bit about the UX world. The inception of this kind of work is around other kinds of design and marketing and product development if you think about sort

of pre-web and then with the web came the user experience field which really brought, I think it helped bring the term design into consumer's vocabulary, producer's vocabulary, obviously the things that Apple did really, helps make the notion of design very common. I think that changed the conversation and the awareness and the idea of interviewing as part of that have followed along. Where it was sort of what we do design, or we make things, but we don't do design, and now we make things and we do design. It has evolved to the point when people talk about design; some sense of input about users form what the opportunities are. This has been the latest thing. I think, early on testing what we have designed is sort of where user research was, and I think it has expanded to there is a sense that this process fits into a larger design approach. Again, that is kind of anecdotal but that seems to be where I think it's coming from.

Joe: *Do you still need the traditional surveys and customer focus groups? Are they complimentary or not?*

Steve: I think they are complimentary. It is fun to harsh on focus group because we've all been; we've all observed them or lead them or had to deal with the result of them or, fight someone not to do that and do something else. There are so many methods, and you can continue invent more methods or combine them. I'm always interested on how different pieces either support each other or one thing can explain something. We've done work where we use a large quantitative study to tell us what do dive into. We've done things where we've informed

something that's more quantitative where the questions that are, we are trying to create some measures around, came from the output of something more qualitative. The dynamic between those two I think can be, where quantitative and things like surveys where you have some stats. Where you have some larger sample size, although, I guess focus groups fit under qualitative. I think it's about being smart and looking at what the questions we have. What is the information we need to move our project forward? What are the tradeoffs between the different types of approaches that we have? I don't want people always to interview users of their context. Nor do I want them to be doing focus groups. I think it's just having a range of approaches and being able to choose wisely between them. I don't feel like there is a magic solution.

I think in the book; I showed a couple of diagrams other folks have created to try to wrap their head around that complexity. If you're here, do this. If you are here, do that. That may work for some people, and I think it's nice that we are always trying to create that map. I think there are so many new ones and so many constraints in any emerging questions that it's a little bit of magic to try to craft, to try to figure out what's the approach that makes the most sense. Is it interviewing? Is it a focus group? Is it a survey? Is it combination? Is it something we're going to invent right here? You know, all of those.

Joe: *When I think of capturing the information in the interview, I think of two things, either I come in with my Sixty-Minute camera crew, or I go out in the car after the interview and write it down in a notepad what I just learned. Both of them*

have pros and cons, but is there a certain way, I should be capturing information or something you can help the listeners with?

Steve: There are all those things that come up, and there's a big gulp between what was actually said. I challenge anyone to go back and watch an interview and compare your notes. You'll see sometimes critical, sometimes not, it depends on what the issues are. You'll see some big, big, big differences. You need to know for sure what they said. How many they said if it's a list of things? What sort of unstated were noticed? You would have to go back and tease that apart because you're not just interested on what's on the face or what the word that comes out of their mouth. You need to dig into it a little bit more. That's why you need that definitive record, and it doesn't have to be a sixty-minutes camera crew, it can be, when flip cameras were a thing, people were really kind of into those for their easiness portable HD quality hard disk cameras keep coming down in price and in size, and I think, the quality of that, or an easy audio recorder, those things are so small as long as you have plenty of batteries, you can kind of set them and forget them, and that would be what I would tend to do and recommend. You are not producing an Oscar nominated documentary on this. You're just going to capture a reasonable fidelity and then tools are available to that very, very well.

The thing I was going to come back to was that note taking process that you just described whether you are doing during or doing it after, people find that really valuable as a way to kind of sort through. I can't see you right now, but I can imagine you scribbling things about what I am saying or someone listening to

the two of us talk, might be kind of jotting notes. It a way that people process information and that filter, although, its distorting, it' also really important because that's the way that you start making sense and thinking about what the implications are. So, sitting down after an interview and saying to yourself or your colleagues what are the five most important things, what surprised you, you can facilitate that debrief or you can set yourself up to take notes during as a way to help you start processing all that information. But you still want to do some processing with that definitive record.

Joe: *I want to step back for a second, and as a manager, let's say, I send three people out to interview or just watch the experience. They can come back and give me completely different interpretations. So, how much value can I put in this?*

Steve: I love that. That's a great way of putting it. I think that the unique perspective is one of the things I enjoyed about doing fieldwork and trying to make sense of it. I think about setting up a study, series of interviews with whoever the team is going to be so that there's some chance for success, and you don't want to stand one person off to see customer A or one person to see customer Q and so on and then have them make overarching conclusions about what the need is or what the opportunity is. There has to be a way of combining that. It's nice to do an interview in teams. But then that debris of two is really a nice size and then that conversation afterwards. What did you see? What did you see? It is really cool because people will see different things and that conversation it's not really a

battle about what's right. It is really more of a way to conglomerate what those different impressions were and align on that and then to have if different people are talking to different customers, to have them come together and report things and so then what this conversation often include is people saying, "Oh yeah, our guys said the same things and for him it's because of this and this, and this".
You start to find commonalities and then you start to find contrast and part of what you want to do is understand why are those contrasts are. Well, of course, this customer didn't have this problem because they are, in this kind of situation in their life cycle or in their technology or whatever that is. That hashing it out between the different people who have seen different things starts to uncover what the critical factors are and then now you are doing, now it's what you do with the interview. Now, you are thinking about how we get to the implications for our product or design. I love that contrast. I loved that people are just messy. We have to kind of bring messy people in to try to deal with that and have a conversation. There's process to that, just like you asked about interviewing. There's a process to doing some of this sense-making, and I just give you a little scaffolding for how you might kind of bring these pieces together and to start to kind of line commonalities and contrast. You could structure it, but it is still kind of messy, and it just reflects the nature of what we are starting with which is people.

Joe: *If I'm an introvert, can I still interview people? Am I going to do well at this? Or, do we need to be an extrovert to do this?*

Steve: That's a great question. I had a long talk with people about this. Just the other day, which is continuing to email, one of the observations we are making. We were speaking to a group on this topic, and it seemed like from observing the room that there were a lot of introverts. It caused me to comment that, among people that who described this is their profession, there seemed to be a lot introverts. There seemed to be disproportionally introverted. I don't have any stat for that, but it's just a sense that I have, and we are just trying to unpack why that is. Why are introvert drawn into this work? Because as you said it, it sounds very extroverted. The thing about introverts is that introvert do extrovert looking activities if they play a role and there's nothing like an interview with the structure. It is a meeting you had some tools to follow. You have some processes that have been scheduled, and you show up with your video camera, your Sixty-Minute crew.

There is a role that you can play of the interviewer, and I mean, for me, it lets me do really wonderful things and meet fascinating people that I couldn't just do without that. That is leg up that the interviewer role gives me. I was saying to someone that one of the things that introverts do is kind of hold back and watch and observe and a try to interpret it, make sense without necessarily participating in. So, for me to have a conversation where I say 10% and the person say 90%, but I'm so active in observing and intuiting and in interpreting and planning what I'm going to say that to me is kind of a dream for an introvert to get to do that. I think the introvert does very, very well here. I think being armed with the tools as opposed to just go to talk to people that's a terrifying

way for the introvert to approach it. Both sides of that continuum can do very, very well in very different ways, I think.

Joe: *Can I learn from watching someone on TV? Can learn from Oprah?*

Steve: I think it's great to watch other people interview. It's a good model for learning, and obviously, media interviews are different from design/informing interviews. I think you can learn, good and bad, from all of those and think about how they are choosing what to say next and how is the person responding and what are they doing to uncover more than just sort of surface information. Documentary films are fascinating for this, one's that are interview based and one's that aren't' even. Look at that as a tool to dig into a story that is previously hidden where the person uncovering it didn't know where it was going to go, what they were doing to try to get out of that. That's fascinating to me.

Joe: *Well, I think your book covered a lot of areas, just not the questioning, but the preparation and also how to get the most out of the interviews and I think you did a very nice job with it, and I want to complement you on that.*

Steve: That's so nice thank you.

Joe: *What do you have upcoming for yourself?*

Steve: This is my first book, and I'll talk about sort of where I am at with that. I've got

this body of work that I'm very proud of, and I think people are interested in. So, I'm spending time talking to people about this and sort of thinking about what's next. I don't mean, what book is next, I think that's a way off, but you know as much as I am out there, doing workshops and working with clients, on these types of things. It sort of puts me into a post book stage, what would be the topics that will excite and challenge in the next three to five years and not, I don't mean where the baby walrus come from, I mean, in this space that we are talking about, about how we innovate and how we, understands the problem, understand ourselves. I feel like there are some threads that are kind of intriguing me.

Joe: *Where can someone find the book and find you?*

Steve: The book is published by Rosenfeld Media, I'm not going to dictate a url, and you can find it in Google. *Interviewing Users* from Rosenfeld Media is probably the best place to get that. You can order the hard copy or the epub, and I think if you order the hard copy, you get the digital version for free. And me, I will dictate the url. It's my last name portigal.com that's my business; that's my blog that we have. You can find me on tweeter.

Joe: *And Portigal is spelled?*

Steve: P-O-R-T-I-G-A-L

Business901 *Podcast Transcription*

Implementing Lean Marketing Systems

Joe: *I saw a couple of the Flicker pages about the book that had mind maps on it which were intriguing. I actually printed one out for the interview and have it front of me.*

Steve: Oh, cool. That's great.

Joe: *You also can be found on LinkedIn; I assume.*

Steve: Yes, I think its Steve Portigal on LinkedIn. The unique part of Steve Portigal, That's my tweeter handle, that's my LinkedIn domain.

Joe: *Well, I would like to thank you very much Steve. I enjoyed the conversation. You have a good book with a lot of good information in it. It was a good read. When I started preparing for the interview, I started re-reading the chapters and find all kind of things.*

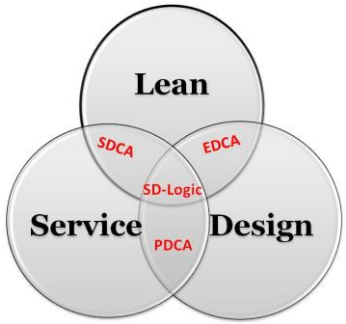
Steve: That's awesome. Thank you so much.

Joe: *This podcast will be available on the Business901 blogsite and the Business901 iTunes stores. So, thanks again Steve.*

Steve: Thank you very much.

Business901 *Podcast Transcription*

Implementing Lean Marketing Systems



Joseph T. Dager
Business901
Phone: 260-918-0438
Skype: Biz901
Fax: 260-818-2022
Email: jtdager@business901.com
Website: http://www.business901.com
Twitter: @business901

Joe Dager is president of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

Visit the Lean Marketing Lab*:* Being part of this community will allow you to interact with like-minded individuals and organizations, purchase related tools, use some free ones and receive feedback from your peers.