

Module: User Research & Assumption Testing



Key concepts and terms

Theory of Change: A theory of change is a tool that you can use to clarify your organization's overall strategy, articulate why you think it will work, how you will know if it is working, and what you'll need to put it in place. Theories of change define how and why a desired change can come about in a particular context. While theories of change aren't commonly used as part of a traditional human-centered design process, they are a time tested tool in fields like international development and social change activism. Using a theory of change in the design process can help cement what your goals are, why you are doing what you are doing, and what you aim to achieve.

Non-directive Interviewing: Non-directive interviewing is a user research technique in which interviewers gather qualitative insights from individuals who are representative of potential users. In non-directive interviewing, the interviewer does not frame questions in terms of right or wrong answers or limited sets of options and avoids leading the interviewee to answer in particular ways or within particular value systems. Instead, the interviewer uses an open-ended approach to explore the interviewee's thoughts, attitudes, and beliefs. These questions can build on each other and from the user's answers.

When to use this module

By now, you have:

- identified your target audience,
- thought through their intersecting identities,
- and (potentially) developed rich user personas for your product, service or campaign.

Whether you are beginning this module before or after developing your user personas, it is important for us to pause to try and identify our blind spots and confront our own perceptions and misconceptions. How do we know what we know? Is our knowledge based on assumptions or user research? This module will help you answer that question and ensure that you have the facts to brainstorm the most effective tool.

How to use it

This module has exercises that are based on two different interviewing techniques— non-directive interviewing and assumption testing. Non-directive interviewing is ideal for gathering generic information about your target audience, whereas assumption testing is ideal for validating specific hypotheses or guesses you may have made while creating your user personas. You will likely need a combination of both techniques to gather the information you need.

Each exercise will require:

- Time: 1 - 2 hours
- Needs: Pen, Paper, Markers, Post-it notes
- Facilitator guidelines are noted in each section below
- Please note that this is a two part module. The insights from your non-directive interviews will inform your assumption testing!

The Exercises:

NON-DIRECTIVE INTERVIEWING

There are many ways for you to learn more about your users—focus groups, surveys, and interviews. Non-directive interviewing is an essential tool when creating a human-centered product, service, or strategy because it creates space for you to listen to your target community. A good non-directive interview will almost always tell you things you didn't know and wouldn't have thought of yourself.

A good example of non-directive interviewing is when a journalist engages in a long-form discussion with a celebrity or politician. By comparison, a good example of directive interviewing is a multiple-choice test. For example, where a directive interviewer might ask "how much of a problem is corruption in your country?" a non-directive interviewer might ask "tell me about your experiences interacting with the government." Non-directive interviewing is a core tool used in ethnographic research.

Please note that this exercise is particularly useful if workshop participants can immediately move from practicing with each other to conducting interviews in the real world with real users. Depending on logistics, it can be helpful to conduct this exercise right before meeting your users face to face.

Develop your questions

Time: 30 minutes

Refer back to the assumptions that you've been noting down as you've completed the previous modules. Take a minute and brainstorm any other educated guesses you've made through the sprint. Now, as a group, try to come up with questions you would like to ask your potential users as you research for this project. Discuss whether the question is directive or non-directive and explore ways to come at the same question non-directively. Remember to use techniques like "could you tell me more about..?" in your questioning. Sometimes a great way to start off questioning is to ask people about their day and or week and go from there.

Non-directive Interview Roleplay

Time: 30 minutes

It is time to practice! The group should break into pairs with one person taking the role of interviewer and the other acting as the interviewee. For the first question, start with a directed question; then ask the same question in a non-directive format. Notice the difference in responses as non-directive questions provide richer details and perspectives.

Then, using the questions you've developed as a group, conduct a short non-directive interview. Interviewees should provide "meta" feedback throughout the process on ways in which questions direct or do not direct them. After 5 minutes of interviewing, participants should take 5 minutes to debrief and note down any necessary edits on a piece of paper. Then individuals should find a new partner and switch roles.

(Facilitator Tip: in order to facilitate finding new partners, have people who were in the interviewer role in round one raise their hands and people who were in the interviewee role pick one of them.) After the second round, debrief as a group and edit your non-directive questions accordingly. You are now ready for some real world interviews!

Interviewing your users

As a group, brainstorm how you will set up your user interviews. Consider the location—where are you most likely to meet your target audience? Is this location accessible? What accommodations do you need to make to ensure that your target audience, including persons with disabilities or those with family or childcare responsibilities, can participate? Plan to budget up to 30 minutes per interview which may mean that you won't be able to ask all your questions. Prioritize the questions that are most critical to your product, campaign, or service. And get ready to interview! Try to do at least 5 user interviews if possible.

During the interview, remember to actively engage in the conversation - pause, nod, don't interrupt and be patient if the conversation seems to go "off topic." That's often when you learn something unexpected and important! Keep asking "why?", even if it feels repetitive, to get to the interviewee's beliefs and

motivations. Remember, we want to understand our users' opinions and emotions, rather than focusing on fact-based responses. Make sure the interviewee feels listened to and always thank them for volunteering their time to support your effort.

If consent is given, try to interview in pairs so that one person can record or take notes. These notes have the insights you've learned from your conversations and will be important as you begin brainstorming your product, service or campaign. Remember to hold a debrief session after each interview to discuss what both team members heard, what seemed interesting, insightful or odd. Think through how you can use each conversation to refine your persona.

At the end of these interviews, you should have a lot of new ideas and even more new questions! Because non-directive interviewing avoids steering the conversation in a specific way, it almost always expands the number of ideas and avenues for further research rather than helping narrow things down. So if the team feels less clear in some ways about what the project is for.. that is actually good! It means that you've gotten in touch with the full complexity of your users' perspectives, have shed your initial assumptions, and are ready to start creating your human-centered product, service, or campaign.

Make sure that you capture a list of the insights, big and small, that the team has had through this process. You might capture these electronically or on paper, but the important thing is that they are available for everyone to refer to throughout the rest of the design process. Right after conducting the interviews, be sure to record your own thoughts or inspirations that have come out of the interview and conversation. It can be very helpful, as you start to craft your strategy, to refer back to these insights in order to keep yourselves connected to the human beings you spoke with.

ASSUMPTION TESTING

The process for assumption testing is similar to that for a non-directive interview. However, instead of asking questions about your users' lifestyle, demographics, or experience, the questions you ask are specifically meant to clarify any outstanding assumptions you have. For each of the assumptions you had identified prior to the interviews, craft questions (hopefully in a non-directive style) that can help you answer the following questions:

- Was your assumption right or validated? Can you refine your user persona to clarify the assumption?
- Was your assumption wrong or invalidated? Can you refine your user persona to clarify the assumption?
- Was your assumption inconclusive? Did you have conflicting information? Can you use this conflicting information to make a more educated guess about how important this assumption is to your target audience? Can you refine your user persona to include this nuance?

Use the information gathered through your non-directive interviews to edit and update your user personas accordingly. You can do multiple rounds of interviews—so if there is something you want to dig into further or ask more about, you can always schedule another interview. However, there will always be more that you can learn about your users, so when you feel as informed as you can be, move on to the next module. You'll have many opportunities to interact with users and gather feedback in the upcoming activities.

I'm stuck...

- If you can't speak with your users in person, consider video-conferencing! Communication platforms, like WhatsApp and Zoom, can be a great way to speak with marginalized members of your target audience who may be hard to reach otherwise! Many platforms include features like captions and subtitles that can make your conversation more accessible.
- Stuck on a location for your non-directive interviews? Public spaces (like public libraries, parks, or coffee shops) can be an easy place for you to interact with your target community. Just remember, public locations should be easy to access (geographically and financially) for your target audience and include any necessary accommodations for persons with disabilities.

Don't forget!

Inclusion Tip: When doing user research, who conducts the interview can play an important role in making the interviewee feel comfortable. Pay attention to who on your team is doing outreach to marginalized communities. If necessary, rely on partners and allies to help create that safe space.

Non-directive interviewing is a tool you can use throughout the design process. It can be useful early on to try to understand your users and how they think about their lives, needs, and abilities generally. As your product, service, or strategy starts to develop, you can use non-directive interviewing to explore more targeted questions or interests the team might have. For example, if your project related to corruption in the energy sector and your target audience were "low-income citizens living just outside the urban center" early interviews might focus on understanding the role of steady electricity in their day-to-day lives; later interviews might zero-in on more specific topic areas like how and when family members use the Internet or interact with government agencies - all depending on the direction your strategy has developed.

Non-directive interviewing can also be a very useful tool for your team members to use on each other. Sometimes in strategy and brainstorming sessions, it can be much more helpful to ask questions like "could you say more about that?" than "do you mean A, or B?"

What's next?

Now that you've gotten to know your target users really well, it is time to transform these insights into creative solutions! Turn to the "Brainstorming & Ideation" module next.