

## How to interview end users

1. **Pick the right people** - Recruit people who are similar in terms of how they use your software. For example, if you want to elicit end-user feedback on an Accounts Payable system, you might start by interviewing 5 system administrators, then 5 data entry clerks, and finally 5 managers who use your system to approve invoices. Group people by their job role, how frequently they use your product, the training they typically received, the type of data they need to make a decision, or any other set of characteristics that makes the group unique.
2. **Talk with internal staff who deal directly with users** - You would be amazed by how much end-user knowledge is right under your nose. Customer Support, Training, Professional Services, and Sales deal with users and their issues every day. By talking with internal staff you learn how to group users and get ideas on the type of questions to ask them.
3. **Keep the interview structured, but conversational** - To help you stay on track, create a discussion guide with a list of areas you want to cover during each interview. Start the interview by explaining its purpose, and say what you will be doing with the results. Once you are into the conversation, walk through a single workflow or a small set of tasks. Good questions to include in your discussion guide are - What do you do before and after each task? What information and feedback do you need to do this task? What do you find easy? What is difficult? Where do you tend to make errors? Who do you interact with to accomplish the task? Phrase your questions so they are open-ended, focusing on the here and now, and not on what the person would like or what they might do in the future.
4. **Use the phone** - While it is always better to talk with end users in their natural surroundings, this approach can be costly. Consider interviewing people over the phone. During the call, have the person talk with you about how they perform a certain task, while they actually use the software. If possible, watch their screen through an application sharing program, such as WebEx, or mimic their mouse movements on your own computer.
5. **Invite others to observe your interviews** - Your team mates can take notes on what the end users are saying, allowing you to concentrate on the interview. Observers provide a unique and valuable perspective on the issues end users bring up. Once your interviews are complete, invite the people who observed to a meeting where you can compare notes and discuss your new insights.

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