INTERVIEW GUIDE

Example guide for the interview with users of B2B software

The interview guide is a list of questions that the researcher should ask the user/s taking part in the interview. Preferably the order of questions should be kept. However, the researcher should reorganize the interview flow to improve the smoothness of the discussion, the guide can be treated less strictly.

All italic and blue parts of this guide are merely a suggestion for the interviewer to better understand the flow of research and should never be read aloud to participants of the research.

The structure of the guide mimics the tree structure of the data. The researcher starts with a general question (usually a Wh-question) to move to more detailed nested questions if needed.
- If the participant's answer is comprehensive and there is no need to dive deeper, the researcher can move to the next general question.
- If the answer provided is short and straight to the level where there are still many unknowns, they should follow with the nested question.

1. Intro to the research situation

(Why we are here)

- Hi, we are UX researchers of [your company's name], and we have invited you to this meeting to gather knowledge about how you use [your tool's name] to make the most of it and how we can improve it for you. Today, we would like to focus especially on the topic of [name of the feature/module].

(How would we define [the feature/module we want to talk about])

- We define [feature/module name] as places where we show [explain shortly what this feature is about].
- We will want you to show us how you use [your company] product, so we will want you to share your screen and point to things. If you're actively using the product, we want you to use something called a "think-aloud protocol" which means that before you click on anything, tell us what you're going to do and why, so we can ask you questions if we have them.

Researcher, please notify about the:
- *recording - will be used only for the internal purpose so that the researcher can concentrate on the talk*
- *there are no good or bad answers - or at least researchers have no expertise in that area, so the guests are the real experts*

2. Warm-up: Understanding the customer's context

- To start, please tell us what is your role in your company.
  - What are your main responsibilities? *(Researcher may ask additionally about the area that is part of our interest the most)*
- What are you using [your tool's name] for?
  - *Researcher, check which features/modules of the product is customer using, probe on:*
    - *feature/module name*
    - *feature/module name*
    - *feature/module name*
    - *etc.*

3. Customer's main KPIs in [your tool's name]

- In general, please tell us what type of information are you looking for in [your tool's name] the most often.
  - What is the key information here for you?
    - Why? What do you do with this information?
    - Where are you checking it?
    - Is it clear to you?
    - How might it be improved?
    - Are there any other places where you can check the same metric? Where is that?
  - Do you use that information to report higher in your organization? Please describe how you do it.
    - What tools/ software are you using to report key metrics/information?
  - Have you ever exported the data from [your tool's name] to different tool/ software to work on it?

    IF YES:

    - Why are you doing that?
    - What [your tool's name] lacks that you need to export the data?
    - What can we do to help you perform those actions?

  - How might getting the information you need be changed to improve your experience?

4. Deeper analysis of selected feature/module

- Are you using this module in [your tool's name]?

- What for?
- Tell me about the last time that you were using this feature, what you were doing, and what you were clicking… let's recreate that experience once again
  - What did you like?
  - What was the most frustrating?
  - Were you missing anything?
- What is your overall opinion of that feature?
  - What is the most important information for you here?
  - What is the least useful/ important information?
  - How do you find the way the information is presented here?
    - Is it informative?
    - Accessible?
    - Easy to read?
    - Comprehensive?
    - What would make it easier/better?
- Are you lacking any important data? What is that?
- *(If the user is dissatisfied with the experience)* How would you like that to be displayed?

IF NO:

- Why not?
  - What tools are you using to obtain the same or similar effect as provided here?

5. Summary: directions to improve the experience

- In terms of [the goals they've told you they are trying to achieve], how good is [your tool's name] doing?
- What can be improved?
  - Which improvements are the most important for you? *(Researcher should ask this question if a user shares more than 3 ideas for improvements)*
- What tools have you been using before to:
  - [action that corresponds with the feature/module discussed before],
  - [action that corresponds with the feature/module discussed before],
  - [action that corresponds with the feature/module discussed before],
  - etc.
- Are there any other tools that you use to support your [fill in] work? Or related tools that you find particularly useful or relevant to this work? Give us an example of what you consider a nicely designed [feature/module name].