Interviews Rather than Field Studies: Better Understanding on What-Is-to-Be Developed with Less Efforts?

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ABSTRACT
Field study methods such as contextual inquiry are effective methods for understanding users’ world. They, however, require typically a lot of resources and are expensive. In some of my projects I have not had such resources available. In these cases face-to-face interviews have been the choice as a less resource consuming and cheaper method. However, I think that the result has been almost ‘a triumph’. I think that my ‘substance interview’ strategy helps to gain a very good understanding of what is to be developed – probably even deeper than field studies would provide. Further, the usefulness of the interview method does not seem to be context dependent, i.e. is ‘transferable’.

INTRODUCTION
Usability is about supporting users’ world. Systems that are used at work should to support users’ work. Therefore, it is essential to understand users world and work as the basis of system development.

When I have done usability evaluations (expert evaluations), I have found almost regularly that some usability problems origin from the fact that the designers have not understood users’ work. One could even state that the designers had not truly even understood what exactly is the object of the design. And these problems typically are both the most severe ones and difficult to fix.

Understanding users’ work is a challenging task. Field study methods such as contextual inquiry (Holzblatt, 1993) are effective methods for gaining the understanding. They, however, typically require a lot of resources and thereby are expensive.

In many of my consulting cases, I have not had resources for field studies. Therefore, face-to-face interviews have been the choice as a less resource consuming and cheaper method. I have, however, found that one can gain a very good and deep understanding of users’ world with interviews. Even to the extent that field studies would probably not provide much added value.

Probably this is not ‘method transfer’ case because interview is a different method than contextual inquiry. So, the message of this case study is that one always cannot ‘transfer’ a method one would like to use, due to the business context (money, resources). Therefore, does not allow using ‘best’ methods but use a ‘cheaper’ one.

But the other message is that I believe that I was able to develop an ‘old’ method (interview in this case) to a more effective one, just because of the reason that ‘I had to’. And further, the experience so far indicates that this method is very transferrable.

I call this interview approach as substance interview. And my perception is that substance interviews work so well that I do partly question the necessity of field studies.

I think that this paper is a story of “triumph”. However, this is conclusion is based on my personal impression and some informal feedback from the customers; not on disciplined research.

MAIN FEATURES OF SUBSTANCE INTERVIEWS
The goal is to understand ‘what system is to be developed’ essentially but deeply. So, actually this is a bit more fundamental analysis than understanding users’ work.

The main features of substance interviews are:

Outcome
I have not exactly formulated how exactly call the outcome of the interviews. Customer feedback has been excellent. But when I ask customers what exactly is the thing that we produced, they cannot say.

What I can say is that output is an essential and deep model of the substance of the system to be developed. And the output is totally implementation independent.

Anyway, I model the outcome as a (large) mind map. The other, and a very essential outcome is the project team’s increased understanding of the system, and the common shared terminology and language.

To Whom
I have used the approach in IT development projects. It, however, should be applicable more widely in other kinds of projects because the output is implementation free.

Benefits
The project team will know from the beginning what essentially and exactly we are planning to develop. Tacit knowledge will be made explicit, and undesired surprises will be avoided in the latter phases of development. Provides a common language to the project team.
When to do
The interviews are most useful to do in the very beginning of the project, before requirements definition. If done afterwards, helps to identify main usability problems. (This is the origin of the approach).

How to do
The interviews are carried out in half a day interview sessions. These are repeated until the system-to-be-developed is analyzed thoroughly enough. In between the interview sessions, I refine the model by myself alone.

Interviewees are those who have good knowledge of the application domain.

The driving force of the interviews is that I personally need to understand ‘what is to be developed’. The philosophy is that if I understand the system-to-be-developed, then the interviewees and the project team understand, too.

During the interview, I model on-line the ‘what is the system’ as mind maps on a shared screen.

Required resources
The resource needs depend, naturally, on the complexity of the system. The other factor is how easy it is to reveal the tacit knowledge: how well the interviewees can articulate what they know.

Based on the experience so far, the required resources are from three consulting days and up.

Application contexts
I have done these kinds of interviews on a number of different applications: a check-in system for a hospital; a government license management system, a commercial web application, an ERP system, and a healthcare directory system.

Customer feedback
The informal customer feedback has been most encouraging:

- “Viewpoints from all stakeholders incorporated”
- “The basis for specifications; we always come back to check things from the mind map”
- “One can keep track about the whole as well as details”
- “You can see visually the whole all the time”
- “Everything essential will be included”
- “A very useful way to make all parties to understand the things and terms in the same way”
- “An absolutely useful way to start a project and to make sure that all understands the things the same way.”

CONCLUSION AND DISCUSSION
I briefly described the ‘substance interview’ method for understanding what is to be developed.

The origin of the method was due to method transfer problem: I did not have resources to do field studies and thereby not to transfer a method that I originally planned to use.

My solution was to do ‘just interviews’. They, however, proved to be very effective ones. I believe that I developed a new kind of interview strategy that I call ‘substance interviews’.

Now what is interesting from method transfer point of view, my experience indicates is that the usefulness of substance interview method seems not to be application depended at all. I have used it in projects of different application domains, and every time has worked.

I believe that the method is transferrable even outside ITC systems. The outcome of the interviews is descriptions of what to be built are totally implementation independent. I believe, but have no cases, that the method could be applied in every project which aim to develop ‘something’.

Limitations
I have not really studied what other kinds of interview strategies exist. There may exist some that are close to mine that I am not aware of.

The usefulness of the method is based my informal judgments and limited customer feedback; not on objective research.

Implications for practice
Based on my experience so far, my absolute recommendation is to do this kind of interviews in every project (!), in the very beginning of the project.

The challenge naturally is that who would to this job.

New research items
There is absolutely need for research – actually, no true research as yet been done. In addition to empirical research, theoretical research is needed to understand and formulate what exactly the outcome of the interviews is.

REFERENCES