Intercepts for Insights

Quickly Gathering Stories for User Research

Who are we

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Workshop Flow

1. Subject Matter Experts
2. Crafting Questions
3. Revising Questions
4. Practicing Interviewing inside
5. Getting out of the building and intercepting
6. Debrief
7. Reflect

End-User

Service Provider

Decision Makers

Our goal is to shorten the gaps

End-User

Service Provider

Decision Makers

Intercepts

- Unscheduled
- Meet people where they are (physically)
- Magically deep quickly
- Meaningful story in 5 min
- Observing
- Low on time and money and formal recruitment is too laborious
- Lots of input quickly

It isn’t rocket science,
but it is a craft that takes
practice!

Goal

Gain an understanding of rider needs we might incorporate in our public transit design so people don't have to rely on private transportation.

SFMTA
Municipal
Transportation
Agency

Jot down questions

5 min

Get curious! What would you like to ask users to help inspire you to come up with solutions. Brain dump, focus on quantity.

- How are people getting to transit nodes (bus stops, train stations, etc.)?
- Why are they using that mode?
- Which people? Who does what?

Crafting questions that inspire deeper insights and stories

Directed Storytelling

- Start with a specific prompt
  - “Tell me about a time when…”
  - “Tell me a story about…”
  - “… the way it felt when you…”
  - “How did you find out about…”
- Make it about something small enough that it is just one story
  - Keep the questions specific enough to hear about someone’s morning commute, not every time they had a bad experience on a bus.

Probe deeper with 5 WHYs

“How did you get to the Powell Muni Station?”

“I took a Lyft”

Jots down Lyft and moves on to the next question.

5 Whys to Insights

1 Why Insight

User takes Lyft to Muni Station

5 Why Insight

User takes Lyft to Muni Station and has never tried Muni before because she finds it confusing, especially since last time she tried he looked for the bus stop and the yellow pole marking wasn't obvious enough.

This inspires me to think about how we might make bus stop wayfinding and signage clearer!

Open vs. Closed (Yes / No)

“Did you take Muni to get here today?”

“Yes”

Jots down user takes Muni and moves on to the next user to interview.

Open vs. Closed (Yes / No)

“Did you take Muni to get here today?”

“Yes”

Jots down user takes Muni and moves on to the next user to interview.

“How do you feel about your last experience riding Muni? Can you tell me about it?”

Leading vs. Non-Leading

“Why is cost important to you when making transportation decisions?”

“Cost is important to me because…”

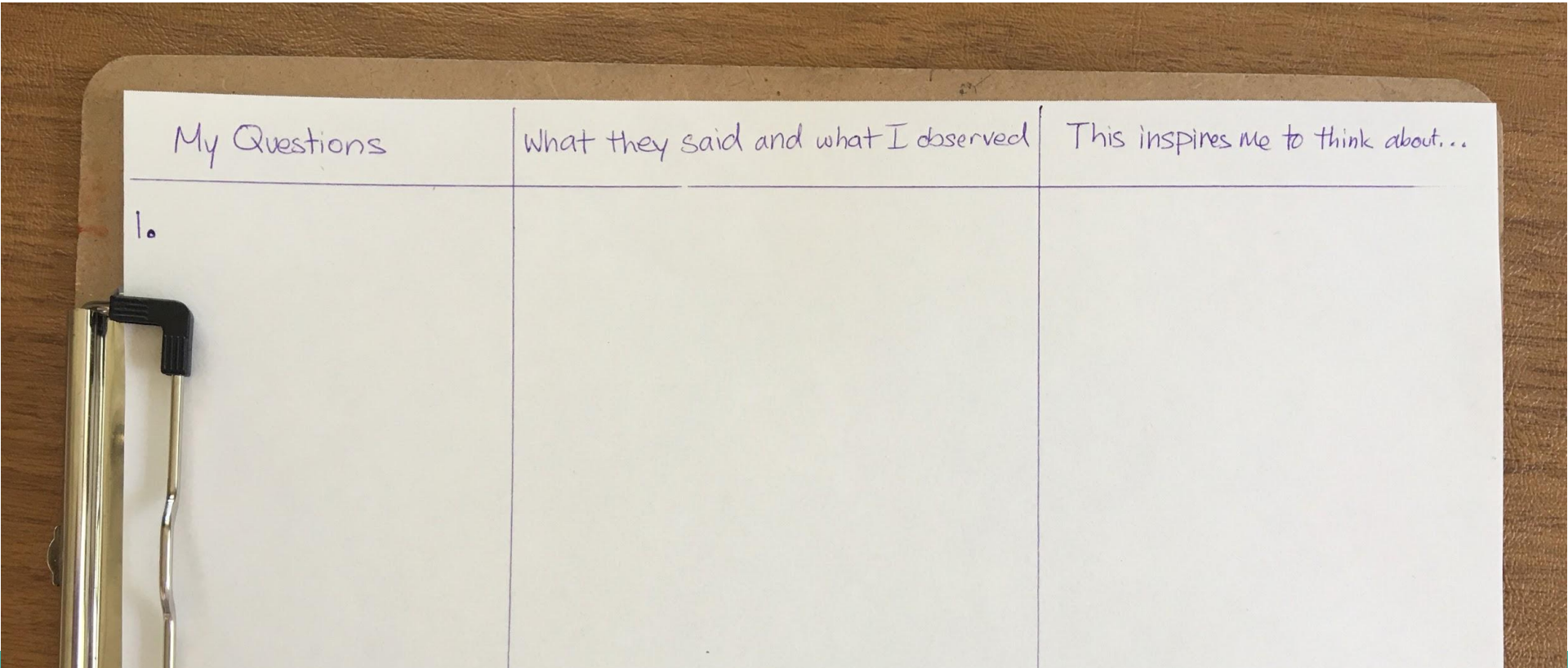
Leading vs. Non-Leading

“Why is cost important to you when making transportation decisions?”

“Cost is important to me because…”

“How does cost factor into your decision making process when choosing how to get downtown?

Format for limiting bias when note-taking



The Role of the Note-Taker

- Write key quotes verbatim
- Observer
- Sense the emotional arc
- Timer
- Security
- Relieve interviewer by adding in a question

Rewrite your questions

5 min

- **Turn to a partner**
- **Look over your questions and revise:**
  - **Open-ended**
  - **Inspires stories**
  - **Asks for specifics without leading**
  - **Fulfills your goal of exploring when or why they take private transportation**

Out in the field

In-Context Importance

Meeting people where they are.

Observing their body language.

Knowing what they are referencing.

Photo from SFMTA

Listen

- Note what they say and sense what they are thinking and feeling
- Interviewer, trust your note-taking buddy and focus on engaging with the participant.
- Make eye contact and don’t look at your phone.
- Follow up with Whys.
- Answer questions with questions
- Control your reactions
- Really listen
- Repeat it back
- Paraphrase and ask if it sounds accurate
- Watch out for non-verbal input

Inconsistencies are a Gold Mine

Often even in a 5 min intercept people are inconsistent in their answers.

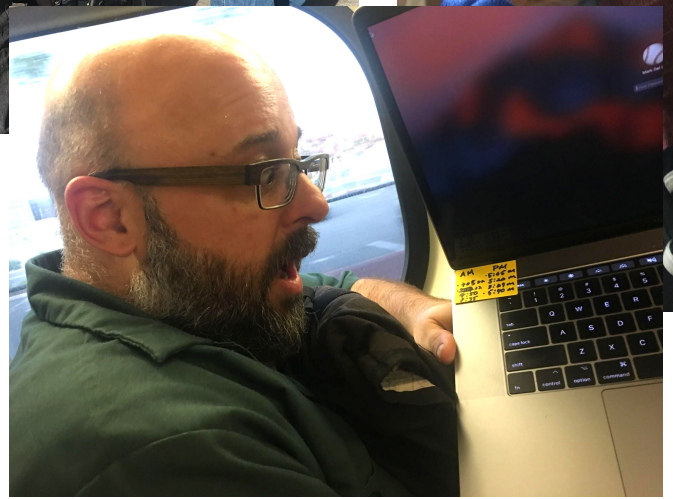
This is a gold mine and perk up your ears for it. There can be some interesting insights here around discrepancies for what people say and what they do. This is the heart of qualitative research.

When a user is inconsistent, probe into that but do so kindly.

“I noticed you mention ___ and ___. Can you tell me how you reconcile this?”

Observing

1. Adaptations, hacks. Communicate a need that isn't being met.
2. Body language.
3. Patterns.
4. Look for the unexpected.



Practice

10 min

- With your partner, pick who is the note-take and the interviewer.
- Pair up with another pair
- Practice interviewing
- Debrief with partner about what you heard, observed, and what to do differently next time?

Approaching People

- Don’t ask if they have time because they will say no. Just introduce yourself and ask if you can ask them a few questions about _____.
- Identify yourself, your intent, and what you are looking for.
- If they ask, describe how you will use this info and why it is valuable
- Keep info anonymous
- Maintain a non-judgemental, relaxed, and enjoyable atmosphere
- Often it’s easier to approach a group rather than an individual

Can you Show Me?

- If they reference something, ask to see it. That can be great evidence for how they adapt to a situation.

One more thing...

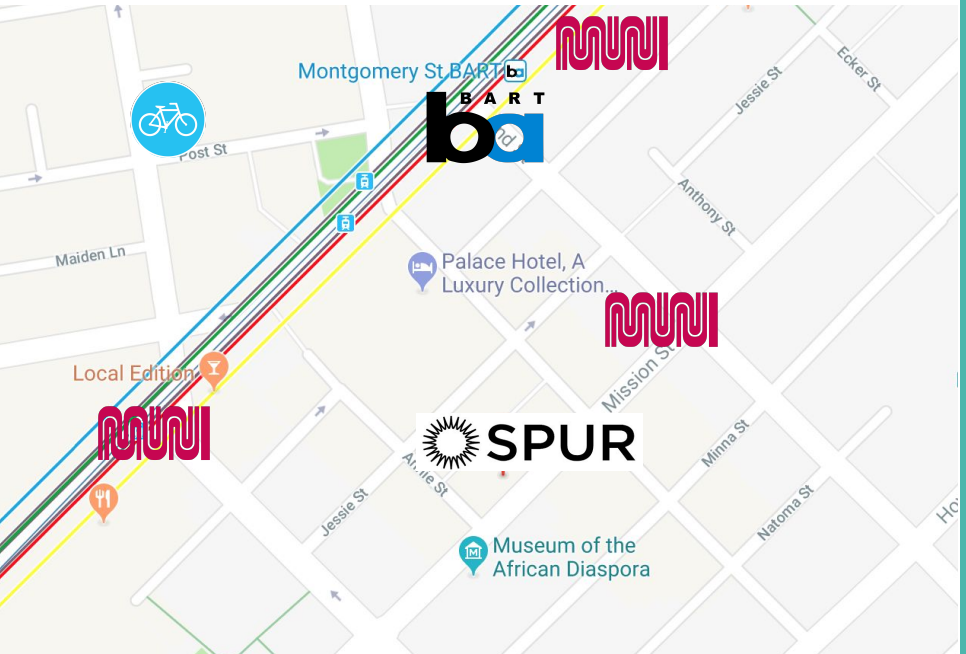
- There is often gold at the end of the interview when you ask if there is anything else they would like to add.

Nervous? Get Curious

Curious about the world, people, places...become fascinated by everything and absorbed in the present moment.

Get out of the building!

30 min



- Collect 3-5 anecdotes and stories through intercepts
- Quality over quantity of conversations
- Check out bus stops, muni / bart stations, street corners, bike share stations
- Don’t overthink it! If you get rejected, move on to the next person.
- Get Stay curious

Be back by 4:35pm

Welcome Back! What did you hear?

Download with your table 3-5 content takeaways from the interview:

- What did you observe?
- What surprised you?
- Did a quote stand out?
- Are there common themes?
- What's something small you can experiment with changing based on what you heard?

Process Reflection:

- What technique was most effective? ...will you do differently next time?
- What made things awkward?
- What technique could you bring back to work tomorrow?

Share out

5 min

- Each team share 1 anecdote they gathered
- 1 insight about the process
- What is something you want to put into practice tomorrow?

Thank You

for your openness, vulnerability, engagement, and energy!

Stay in touch:

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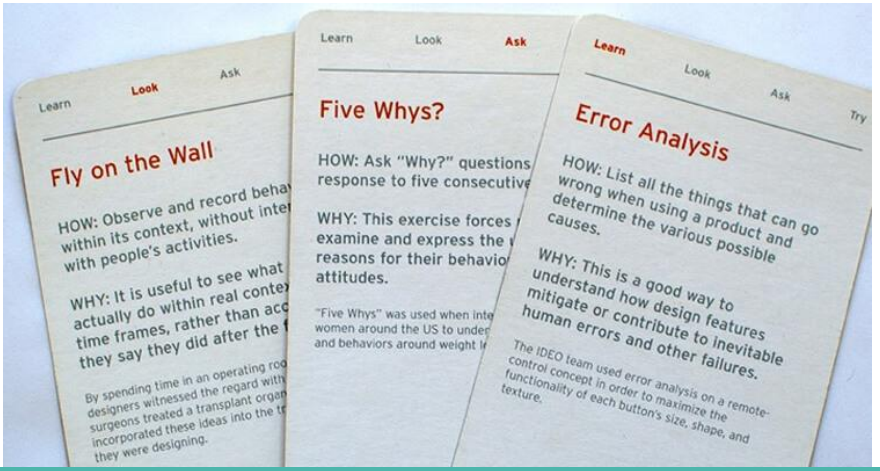
Extra

Method Cards



Study Journalists

Youtube Oprah, Katie Couric, BBC

Qualitative Research

Quantitative // Qualitative

#s // stories

What // Why

Big Data and sample size superficial layer // individual data going deep

Applicable not Pure Research

This is not Pure research, this is Applicable Research.

We are not uncovering facts or getting to truths, we are finding inspiration for designing a solution.

Wrapping up

- Ask participants to summarize their thoughts or feelings
- Always end with “Is there anything else I should know?” and “Do you have any questions for me?” in smaller groups
- After interactions (online purchases, sessions, visiting part of your website), you can send out a survey