The eLearning Coach Podcast #13
Best Practices For Interviewing Your Audience
with Steve Portigal

Hello learning people, welcome to episode 13 of theelearningcoach podcast. In this session, we will be exploring an under-discussed topic, how to interview the audience members of the learning experiences we create.

I am speaking to Steve Portigal who has expertise in this area and wrote a book, *Interviewing Users: How to Uncover Compelling Insights*. I think you will find Steve's advice and guidance invaluable.

So let's get started. Here's the interview.

Connie: Hi Steve, welcome to the theelearningcoach podcast.

Steve: Thanks for having me.

Connie: Can you explain to me what you and your company do?

Steve: We use this blurb to describe ourselves. It says that we help companies to discover and act on new insights about their users and themselves. Our focus is on uncovering something new, learning something about people that is new to that group, but also framing it in some way that there is some action that they can take in response to that, so that might feed into the development of a product that we think of, kind of in the UX (*user experience*) World, such as a piece of software or a piece of hardware or an interface for a piece of hardware or whatever that is going to be, something that is kind of designed in a technology manner. We then try to take this information and apply it into as many different parts of the organization and all of the work that they are doing, their whole relationship with their customer base or internal or kind of whoever is being engaged with.

Connie: That is why when I was reading your book, *Interviewing Users*, I thought it was so relevant to people who design learning experiences because, I think we have a bit of a lack of finding out and getting insights about our users. That is why I thought it would be so interesting to interview you. What is the impact that user interviewing has on a design and on a final product?

Steve: Can I add one to that?

Connie: Sure.

Steve: Definitely the interviewing has impact on the thing that gets made. Really, I think these are very closely related. It has a significant impact on the people that are doing the making of the thing, in terms of what their mental model or frame or kind of belief structure is around the people that they are making something for. I am saying *making* as opposed to *designing* but you could swap any of these words in or out, it is the same idea.

Connie: Right.

Steve: I think there are these different kinds of impacts. This is not just in the work that I do, you know, I take my clients out, I talk to other people, I see this all the time. The experiences that the people have going from their own environment to the environment of people who will be using something and hearing them talk in their own language about what works for them, what does not work for them, what they are excited about, what they are worried about.

That can be just so transformative to us as individuals to start opening us up. At one level, it starts to kick us in the stomach a little bit and say like "Oh, you don't really understand this." That is not very helpful except to make you feel sad. I think it does then take you further, if you work through what you are learning to help you understand more specifically what can we do about it, and I think there is probably impact on the things that get made, the products, the designs, you know, I think that is what applies to your listeners as well.

There are some different points in the process that we do go talk to people. So one is we do not know what we want to do. We are looking for opportunities, we are trying to understand a group of people or a group of behaviors in kind of a fresh way to look for unmet needs or a gap where a solution could go in. That is one area where interviewing users brings in information about people and then we say, "Okay, here are some things we could go and do."

Another area is in the process of developing anything that someone is going to use, we start to build it, we start to have hypotheses, we are sketching things, we are putting together storyboards or wireframes, and some of these may be the wrong buzz words for your audience, but prototypes, manifestations of the idea as we kind of get more and more specific.

There is a lot of talk in the user experience world about "testing," and testing is not really the mindset that I want people to have. Testing says "we have solved this, here is the solution, do you like it?, is it right?, where shall we fix it?" But what I think can be more powerful is once you, as the maker of something, start to get your solution down in some tangible form, you have now made some presumptions. "Here is what I think the problem is and here is how I think we are

going to solve it." And so by showing the solution to people in more of a provocative or open-ended exploratory way, now you are not testing, now you are exploring. Now, you start to learn from people "Oh, that is solving a different problem, and the problem that I have is actually this."

Now that I see the solution, I am able to give you broader feedback on my needs, not just your solution, that is a huge area, and then obviously, there is, this is what they often call usability testing, which is really a varied and ill-defined term, I think sometimes, but that is at the point where we have exactly the thing that we think we are going to make, we need to make sure it is nailed down and it works and people can kind of succeed doing it. Bringing input from users in at different points along the process and then starts to frame the problem, frame the solution, kind of iterate and evolve and help finalize that solution.

Connie: Your points really hit home and two things came to mind for me. One is the transformative process for the designer, him or herself. Just yesterday, I had that experience from developing a course for the people who raise funds for a big hospital, and I was so uninspired. I just did not have any idea of how I was going to do this and what my angle was going to be.

So I had two interviews with members of the audience, and we often do that during the analysis phase or that is when we should be doing it at first, just as you are speaking of, right at the start, and just from talking to the people and finding out that they are called gift officers and finding out what their pressures are and what they do and how much they care about medical research, and that is what their goal is, bring in money for medical research, and that gave me a completely and entirely different perspective of these people. After just two interviews, I was so excited about the project, so it completely transformed me personally.

Steve: That's fantastic.

Connie: Secondly, there are really two places in our field where towards the beginning and during design when we need to be in contact with people. We are never in a situation where it is kind of "what can we teach these people." It is always coming from on high or there is some compliance training, there is always a product or an end in mind, but it does not have to be a course. So during the analysis phase is when we need to talk to people and also during design where we should be, checking in with people during prototyping and then during storyboards, those are two areas that people can benefit from user interviews.

Steve: Yeah, that sounds great, if it can happen.

Connie: Right, if it can happen. What kind of skills can people develop to become an effective interviewer or what kind of skills are needed?

Steve: I think there is kind of big picture skills and kind of tactical skills, and the big picture skill is things like being able to be present, being able to hear yourself and your own biases. You know, kind of cultivating a sense of curiosity and openness. Those I think are really important, and they are sort of harder to train for in my world, although may be you guys understand what that means to train for but....

Connie: I do not think so.

Steve: It is higher level, but I think it is really important because I think you can go through the motions of interviewing and talking to people, but if you are not ready to hear, like really, really hear, then I think it goes to waste. So even more practical things like listening, which everyone here is listening and they go "yeah, yeah, yeah, we have been hearing this since we were teenagers," but listening is such a hard thing to do. And I do not mean the kind of listening that someone would be doing as they are listening to this because they are not in the room with us talking.

I mean, when you are with someone and they are telling you things and you are thinking things and you are asking things, that really, really, you can almost reach a flow state sometimes, this level of deep engagement and curiosity and hunger to hear what they have to say and to commit everything that you are doing to kind of facilitate and help those stories come out. I'm making little gestures with my hands which no one can see.

Connie: It is good to know about though.

Steve: Yeah, I will flag all my gestures. That kind of listening is hard, and it takes a lot of practice, and I think one of the things I find so interesting about this as a kind of work activity is that lots of people can approach it thinking that they already have a lot of the skills because talking to people and asking questions is a thing we have been doing since we could talk, so to kind of unlearn some things and learn new things.

A lot of it is about holding back and doing less and creating space and letting people talk. I work with people all the time, I train groups on this, and I watch them struggle to do differently something that they have done their whole lives with a deliberate attempt to kind of improve it and really watch them struggle with that, but it is like anything else, you just got to keep practicing it and reflecting on it and sort of take that time to think more specifically about it. I guess that is my

short answer that I have got at the end of a long answer. A Jedi level skill on asking questions is something amazing and really quite powerful.

Connie: So I hear you saying that you really have to give up your old habits, it is different than your typical conversation because you are creating space and room for someone else to answer you, not just coming back with the normal ways that you converse with people.

Steve: That is exactly right, and at the same time you are holding back and giving space, you are also really actively directing where things go. One thing I see people do a lot, and this is a very personal process, so I do not want to over-generalize or make anyone think, "Oh, I do that and that is wrong."

One thing is about how much of ourselves we put into conversations with people when we are interviewing them, and I think the sort of the naive assumption is "if I share about myself, I will help that person I am talking to feel more comfortable and be more willing to share about themselves." That is, I think, the assumption, but often that is fairly naive, that the best way to help someone share more about themselves is to be genuinely interested and ask more about it. If you say, "Oh, I also have that kind of thing going on in my house, let me tell you about it." The impulse is good, but that is a good behavior to unlearn… the impulse to kind of mutually share is, I appreciate where that is coming from, but I do not think it has the effect that people think that it does.

Connie: Of course, in this situation, the user is the star, for the lack of a better word, it is really all about them.

Steve: Star is a great word. Sometimes, we talk about thinking of them as the expert, and then I think it would be helpful too because people that are in the business of making a thing go see people that do not know about it or do not know how to use it properly or do not know it is available or whatever, you can easily see them as kind of lesser because they are not as informed as you are, but in fact, it is your job to respect that perspective.

Connie: You need a certain attitude when you go and interview users. Can you talk a little bit about the attitude that one might need?

Steve: If that attitude that says that this other person or participant or interviewee that they are the expert, they are the star, they are the one that knows, their perspective is the valuable one, and that my perspective is something that I can just put on hold for now, that is a huge shift, I think, for a lot of people. We are expected to be experts in most parts of our lives and certainly in our work lives and to do research and talk to people and to inform the design of any kind of

thing that we are designing and then have a point in that process where we have to cultivate an attitude for ourselves that is naive or hungry and curious but not expert know-it-all, that takes us a certain amount of strength of character, a certain amount of confidence to be able to do that, be kind of confidently naive

Here is the trick, I think, to do that with some authenticity. So sometimes when I am working with people and we are talking about how to approach this, and I hear people do this, they say, as they are imagining how they would handle it. "Oh, I don't know about that."

They only know how to lie, I do not mean any harshness to those people, but their presumption is that, well, I will just lie and tell him that I don't know it, so some responses that I recommend when someone says, "will it be available on my mobile phone," you say, "Well, is that something you would want?" or "Why is that something that is important to you?" Just stay confidently in the role of the interviewer and don't get pushed back into the role of the owner of the solution, which then means you must lie.

Connie: So you are saying people have to be really genuine, and when someone asks a question, you kind of put it back on them and ask for their story about it?

Steve: Because you are curious, that is why you are there, as you are curious and you want to learn about them. Yes, so just reflecting or the kind of diverting technique I think is kind of the way to keep it in this.

There are a lot of things that I talk about in the book about great things to optimize to make the interview go really well. My big caution to everybody is always, if you start answering their questions about *will it* or *could it* or *is there a feature* or *what if I want to do this*, if you start answering those questions, the interview is over. That is the most damaging thing that you can do. Because now the dynamic is established with that person that you represent the solution, and they are just simply going to keep querying you. You cannot get it back after that.

Connie: Interesting. What do you do with participants who are reticent, how do you bring them out and get them to start talking?

Steve: Sometimes, that question reveals more about us. Think about what reticent means and how much do we expect somebody to be talking? This happens all the time where I start to hear myself feeling uncomfortable, like thinking "Oh, this person does not want me here, this person is uncomfortable, this person is kind of blocked off, they are not the right recruit for this study."

A lot of that is about me. I am uncomfortable because I am getting cues that I am interpreting as they do not want to talk, and so sometimes a lot of the things that we have to do is just get over ourselves. It is okay, the person is not brandishing a weapon or telling you to leave or swearing at you, so just keep going.

The questions that you ask at the beginning of an interview are easier questions. The questions that you ask at the end are harder questions. So how long have you had this job, how big is your team, what happens when a new document is received into the processing facility, whatever, those kinds of things, those kind of audacious dream questions, those are questions what you ask at the end.

So at the beginning, we often get cues that the person is not comfortable and it might take five minutes, it might take 50 minutes. There is a point at which many, many people kind of tip over in their answers from question-answer, question-answer to question-story.

So again back to us, we have to acknowledge that is going to happen eventually if we have enough time with them, it is almost as a magic point where suddenly that person is telling stories and kind of sharing longer answers. It is our job to establish and maintain the idea that they are the star, they are the center. It is about them, we are interested in them. Our questions are follow-up questions, we are interested, we have the right body language, we ask follow-up questions to clarify, we refer back to things that they have said.

Those are all kind of techniques that reinforce our commitment to learning about this person, and in doing that, we can help them eventually loosen up, whatever their version of loosening up is based on our expectation, until things flow a little bit more.

Connie: I can really see how that can work. It is interesting that you mentioned stories because some people go from short answers and when they finally get into stories, the stories are where the real insight is, it is just so fascinating how that works.

Steve: And that is an argument for putting a little time into these interviews. You can stop people outside a shopping mall and get great sound bites, but you cannot really get these deeper insights because it takes some time for people.

I had really a fascinating experience a few months ago interviewing someone who talked a lot, so I ended up looking at the transcripts afterward, and I think in the first 11 minutes, I think I said almost nothing. I might have said one sentence or half a sentence but really from the get-go, this person talked unaided, so there were no short answers, but what I realized was that it was still about an hour and

15 minutes before we got to a point where this person, where she was really revealing.

I have to say this, we were hearing about bankruptcy, we were hearing about terrible problems with managing taxes, calamitous medical issues with the children, she was not holding back, she was telling us a lot of information, lot of very personal information, a lot of emotional information, but something happened at an hour and 15. I remember noticing that at the interview, thinking like, this is such great conversation we are having and she is sharing so much, but I am still not getting to the "it" that we are really trying to understand.

I did not know what it was or where it was until it emerged. So there was reticence from a sort of, if you do it like a textual analysis, there were a lot of utterances, but we did not get to the richness for a really long time. It was just so fascinating to me to see what it takes to kind of make that come out, everything was kind of aligned, and it still took a long time to kind of get there.

Connie: People might cover up with silence or people might hold back with being verbose, but it is still the same thing.

Steve: Yeah, and it was a surprise to me. I had not really framed it that way until that happened, and yeah this is a form of reticence.

Connie: It is helpful to think about the whole experience as exploratory, but I wanted to move on to something you have in the book about your operating principles for doing interviews. What do you mean by that, and can you tell us a few?

Steve: We have talked about them a little bit, but we have not hit them really dead on. I think I said this before, that there are high level things and there are practical things. I am interested in people that are going to go talk to customers or users to understand the principles, understand kind of the philosophical approach, and then I think a lot of the tactical things will follow from that.

You know, I gave an example earlier about how to ask a question with authenticity. I think the principle of authenticity is important. It is not about the tactic, really, it is about the approach. So the approach for me is things like check your worldview at the door, embrace how other people see the world, build rapport, and listen. We have talked about each of these indirectly, I think, already a little bit.

Checking your worldview at the door is, sometimes they talk about confirmation bias. You have an idea in mind about what the solution is or what the problem is

or who that person is and you discard things that do not fit that. If I could just offer a sideline example for a second.

Connie: Sure.

Steve: Really great episode recently of This American Life. It is about a detective that is interrogating a woman, and clearly, he is not trying to railroad her and kind of get her, but I guess they did not do a lot of taping of interrogations at that point, only confessions, and he happens to have these tapes and went back after the case had gone cold and watched them again or listened to them again and realized what he was doing, and what he was doing was there were lots of things that person said that, assuming they were true, they clearly could not have committed the crime, but just he reports on himself, he did not hear that. He just did not hear it.

He was not doing anything malicious, he just was not sort of not ready to hear that because he discarded things that do not match his presumptions. So that idea of understanding what is your worldview, what do you believe about people, what are your hypotheses, your biases, your assumptions, just owning that and then that lets you set it aside a little bit, embrace how other people see the world.

I think that is what we were saying before about making that person the expert. I like the word embrace because it just suggests there is a active outreach, not just a receptiveness, but your arms are reaching out to kind of grab from them, how do you see the world, I am going to kind of reach out and get that from you, not just passively accept it.

Connie: That is more like empathy.

Steve: Yes, and then we have talked about rapport building, I do not know if we used the word, but we talked about that, that kind of connection that you have with people where they feel like it is about them. It is interesting because I think I have done a lot of interviews where when we leave, the people thank us, and that often surprises my colleagues because they think that this is a huge imposition and we are going to get people talk about stuff and it is a big pain and they are going to see something about their lives, but that actually is really valuable to people when you do it right, when you give them the gift of listening and you establish that rapport, and they do not feel like they were interviewed. They feel like they have had a really great conversation.

Connie: I love that, that is beautiful.

Steve: Yeah, it can be surprising, but it is really nice.

Connie: Because how often do you really get listened to?

Steve: Exactly, your therapist or your hairdresser or that sort of thing.

Connie: Exactly. So how do you go ahead and plan for an interview?

Steve: The question I think is a great one because it presupposes appropriately that we plan for an interview, and I sometimes end up telling people about the importance of planning because I think most of us assume that you should do that, but I have seen people that wing it, it is kind of a thing that some people think they can do is just go and start asking questions because they know about what the issues are.

So planning an interview means figuring out who we are going to talk to, what are their characteristics, and how can we get to them, and that might require some brainstorming, some creativity, some range of different approaches, but also what are we going to do with them. Planning means putting together a plan for the interview itself, a document, you might call the interview guide. It is a guide, but to me, I think about it as the platonic ideal.

If I have never talked to anybody and I will work through the problem space, I think I understand what the issues are, I kind of write in my head and then I kind of type it up, hears the way the conversation is going to go, we are going to talk about this for ten minutes, we are going to talk about that for 20 minutes, we are going to show them this artifact that we are bringing for 30 minutes. We are going to do these projective audacious questions at the end, we are going to kind of structure it that way, and then filling the actual questions we are going to ask ahead of time.

It is a funny activity because I have said several times, you want to be asking follow-up questions. Because there is no actual person, you're sort of prototyping in your head, but there is nobody to answer the questions. So yes, question three is going to be based on what you have learned from question one, but you have to write it in the sort of this virtual idealized space.

But that is a really, really powerful activity to go through and craft, not only the questions but the flow, and what that does for me is that it lets me then set that document aside once I go into the interview. I can ask the first question and then I can be prepared to improvise because I have done all this thinking through of where are all the ways that it might go. Of course, lot of things are going to come up that I have not included in the guide, that is why you are doing this, right?

So learn the things that you did not know and so you want to hit that but you want to make sure you cover everything in your guide. This also is a practice activity. The more you practice writing these documents and then using them, eventually you can reach a point where you do not rely on them too strongly. Preparing them makes you a good interviewer for that topic, but you can kind of set it aside and let the interview kind of go where it may, that is kind of the preparation put that together.

Just add one more thing, it is also really important when you have a team or you have clients or whatever the overall group of people is, it is a nice document to circulate and get everyone to kind of agree "oh yeah, these are the things we should be talking about" or "let us make sure we ask about this," so that it is documented somewhere, what you're starting out with at least.

Connie: Yeah, what your objectives are, and it helps to keep on track but then you have to be loose and flexible enough to ask follow-up questions or to go where the person wants to go.

Steve: Yeah.

Connie: Where the interviewee wants to go. That is a real tap dance, it seems like.

Steve: It is a fun negotiation between what the interview is kind of presenting to you as an experience and what you think you want to learn, and I think as people get better at interviewing, they can enjoy that tension rather than sort of feel it as a stress or a pressure.

Connie: So what are some guidelines or tips you might have for asking good questions?

Steve: I think one of the ways to think about that is to keep in mind that it might take you multiple questions to get to the answer. Part of what you are doing is, you do not really know what the answer is. I mean, if you are asking how many people live in this house, and the answer is three, that is kind of it. But a lot of the things that are you doing are a little more exploratory.

So you ask a question, you may be figuring out the question as you ask it, and what you as an interviewer has to do is kind of have that spider sense that says "Hey, they are not done, there is something else here." "We did question-answer, and I have some information, but there is something else that they are trying to tell me that may be they do not really know about."

So you have to ask another question, and I talk about it as having a pallet of questions. In the book, there are a whole bunch of different questions, sequences of things, asking for an inventory of things, asking for people to compare across time or compare across other groups, and so kind of have those in your back pocket to think about as different ways that you can get at it.

I had an example a few years ago where we were talking to someone about customer service, and he said to us "You know, there is this store I deal with, and I don't like their customer service." So I used the clarification question, "What is it about that that you don't like?"

"Well, I don't know, it is this and this and this." So then I tried another way to ask the question. I do not remember exactly what I said, but I may have started to even suggest the answers, which is may be a bit of a no-no, but I was pushing him and trying to come at it all these different angles to try to get a sense of what he meant.

He was telling us something really important, but other than, "I do not like," we could not get anything out of him. We tried three or four times, and finally, (and I just made this up), I said, "Well, let us do a little role play. Why don't you be the store person, and we will be you, and let us call up and kind of see what should happen, let us see how it should go." I turned to my colleague and he picked up his head, and he made a telephone gesture with his fingers, and he said "ring, ring," and the guy picked up the finger phone and said "Hello," and they had a whole interaction.

Connie: Wow.

Steve: They did the whole thing, and then we were able to say, "Well, so what happened there, why was that good?" So I think that I may list role playing as a sample question tactic, but you could never list them all. It is really about having this palette that you can kind of mix from and come up with other questions, kind of tack your questions on. You are kind of looking for trail heads and kind of meandering down them until you get to the point where you're like, "Oh, okay, now we are at the end, let us move on to something else."

Connie: Right.

Steve: That could be 12 minutes, that is not like question-question, it could be a whole kind of thing until you are thinking "Okay, I think we've got this thing."

Connie: Right. For instructional designers, we will often, first of all, try to find out about their environment to see how they might be using the "product," so in some

cases, they need a job aid; in some cases, they would need mobile performance support or maybe they to do need 30 minutes or an hour of training.

And then other times, we need to ask questions about coming up with realistic scenarios and that was what I was doing on my call yesterday with the gift officers. I said, "What happens when you talk to someone?" or "When do you forget to consult the computer?" So there are pretty different types of questions that we need to ask. I can not wait to look at that chapter in your book and see if there are some new things I can learn from it. I love the idea of asking people to role play also, that is great.

Steve: I would never write all these variations of questions. It is really that, we were talking before about the evolution from this plan, this platonic ideal of what you have to do to kind of use that. So you might ask a question that says what is the scenario and then in the field you might say, "Is there a time recently when this and this happened?" or "Do any of your colleagues ever deal with this and this?" You might have four, five, six, or seven ways of talking about it. For example, "In 5 years, how do you think people will handle it when this happens?" And it is all the same question. It all falls under the same category, but you want to get at different aspects of it through different question types.

Connie: Right. One thing that happens a lot in our field is that the higher-ups dictate what people should learn. And of course, the people who have to learn it often do not like that, but not only that, the higher-ups will often block us from talking to the audience. I guess they do not want to hear their opinions. There is this top-down mentality where they want to dictate what kind of training people should take, rather than hearing what the challenges are and what people really do need to learn.

I am just wondering, are there any research-based pearls of wisdom that we can use to persuade higher-ups to let us talk to the audience? Has there been any research that shows when you find out what the audience wants, it improves your product 50% or something like that?

Steve: This is a huge topic, especially in user experience, you are not alone in grappling with that. But I think there are kind of lost causes in persuasion, right? I went on a research hunt a little bit ago based on someone else's request, looking for case studies. So and so did this, and they had an ROI that was this and this.

I think those are hard to find, and I think they are also easily discarded or dismissed because someone can say, "Yes, but our company is different." But I

think it is a really important topic, and I definitely have asked people how they champion this kind of approach in their own organizations.

Some of the examples that I have heard from people and things that I have heard from what my own clients say or I watch them do, has to deal with just stepping back and looking at the problem that they were agreeing to address.

What do we know, what do we have as hypotheses, what are the risks if our hypotheses are wrong, what are the things we are certain about or uncertain about? Really just be honest about that, and before trying to do something new or something different, what have we learned from the past, and I think it starts to highlight the opportunity for learning something specific.

If we say, "Okay, we are going to go through this developmental activity and we are uncertain about this and this and this," we run the risk of the client not paying or adoption being low or whatever the risks are. We should look at this as a way to mitigate those risks. If you cannot create that case, then it sort of pushes back on you, like why do you want to do this if you cannot create the need for it? I am not saying that that automatically makes people receptive. There are beliefs and I think it is hard to do, that is a huge mind-changing thing.

Connie: It is good to try to put it back on ourselves and say, well, we just have to come up with a persuasive case because we know it is the right thing to do.

Steve: Yeah, we are looking for small wins. A lot of this comes back to when you do this, how do you do it in a way that has the most impact on the organization, that is so engaging, bringing influences or stakeholders with you to have those transformative moments. You do not get that out of a focus group, right? You do not get that out of doing an online survey or an online focus group, God forbid. You do not get that personal transformation that just says like "Ohhh, this is different than I thought.

Connie: Yes.

Steve: I think for you, me, us all to be able to be draw a clear line about how we are going to use that information. I loved your example that you mentioned before where you talked to some people and you learned their vocabulary. The vocabulary you had was wrong, and the kind of critical occasions and the way they were being labeled, that is critical, right? To speak to them in the language that they have, so that may be a key output. We do not know this community, and we need to understand how they speak and think and talk about their work.

Connie: Right, if learning is in not meaningful, then it is nothing. It is just information that is not connected to any network in their mind.

Steve: Yeah.

Connie: Yeah. That is what I am going to tell him. (joking)

Steve: Like the power. (joking)

Connie: We should move on to a really important question that people might be wondering about. How do you like to record interviews, in-person and remotely? You know, lot of the listeners are technical, so do not worry about that.

Steve: They may be more technical than I am on some of these things. I think just to step back a little bit, it is essential to record interviews. People like to take notes. The notes that we take and the recordings that we make, (there's a Sting song in there somewhere) are not the same.

You cannot humanly take notes at a pace that captures everything, and you miss critical pieces, so note-taking can be great, it kind of pulls out the highlights. Personally, I cannot take notes and run an interview at the same time, so I tend to not do it. So please, please record everything with a digital media format, audio or video.

You can get a little portable audio recorder, they are cheap and they hold hours and hours, and their batteries last for ever. People talk about using their iPhones. You always want to make sure that your batteries do not run out. I am okay with a specialized device. If I am going on-site, which is mostly what I do, I do take video. Video recorders are small, nice to see the things and see the person, those just make nice artifacts to bring back as well. It is not that much. I have a little teeny table top tripod that costs 25 dollars.

Connie: Right, that is what I use.

Steve: I set the tripod and the video camera up, and I have the conversation. If we are going to leave the desk or the kitchen table and go look around, I grab it like it is a sort of Steadicam grip, and I just walk around with it. It is not an award-winning footage, but it captures the audio and captures what happens, that digital recording, that full fidelity is essential.

Connie: Do you use any kind of backup because I always worry that something is going to go wrong and then I won't have it if I don't take notes?

Steve: Yeah, that is every interviewer's nightmare, right? What happens if your device goes down. The bag that I have with all my video camera batteries and the tripod, we have a little audio recorder in the front pocket, too. That is if I know that it breaks. That is the thing where you think it is working and you walk out of there, and there is nothing.

I have been really lucky, I have not had any catastrophic data losses. I had a couple of occasions where batteries run out, and I am just so engaged, I forget to look and see what the batteries are doing. So when I get a new device, especially a camera, I will go buy the super high capacity batteries that are just the big chunky ones. You never use them if you are walking somewhere with your camera on vacation, but you don't want batteries that only hold an hour and half or something like that.

Connie: Good idea.

Steve: You can order them online, because the ones that ship with video cameras hold nothing.

Connie: Right.

Steve: I do not want to plug in because then that does not make me portable. If I am setting up in an office, I guess I could plug in, but assuming I am going to move around a house or workspace or something or get in a car, it is nice to have the batteries.

Connie: So what do you do when you are interviewing people remotely?

Steve: I think if you are doing the telephone, then I would just put the audio recorder down next to the speaker phone. I know there are devices that will go between the handset or something, I have not played with those, I think Radio Shack sells them, and then if you are going on Skype, I do not know what is the thing that you are using to record?

Connie: Skype is easy. It is *Call Recorder* on a Mac and it is *Pamela* on a PC, so that is always good, and of course, we should mention that you always need to get someone's approval before you record them … written approval.

Steve: Right. We do a general document for the whole thing. That approval might be like a recording release or a consent form. Consent is different than a release for the recording, and sometimes there is a nondisclosure. I do not do a nondisclosure if we do not need to, if we are not disclosing anything. The simpler and the kind of more humane, we can make that bit of paperwork be the better. I

think there is nothing worse than starting off and saying "Okay, well, here are 12 pages of 7-point type I would like you to sign before I begin learning about you."

Connie: And you will need to contact your lawyer first.

Steve: Right, that is not the best foot to put forward if you can avoid it.

Connie: Well, Steve, you have given so much information here. Can I just ask if you have any final guidance or tips that you want to leave us with?

Steve: I think I would just encourage people not to be intimidated by this, to just to do it and learn from it. Be okay with being only okay at asking questions and just stick with it.

Connie: Accept where you are at and continue to improve?

Steve: Yeah.

Connie: What else can we do?

Steve: That is everything in life, I guess.

Connie: I guess so.

Steve: Thank you so much for giving us your time.

Connie: Thank you so much for talking with me. I love the questions, all the conversation.

Steve: So if you were not convinced of the importance of interviewing before this, I hope Steve changed your mind, and I hope you will now find ways to be a more effective interviewer, I know I did.

That's it for now. For the show notes and transcript for this episode, go to theelearningcoach.com/podcasts/13. Take care.