UX Direct Workshop

Discovery Methods: Conducting Stakeholder Interviews

Madhuri Kolhatkar
Director User Experience
Applications User Experience
May 27th, 2014
Your Speaker

Madhuri Kolhatkar
Director User Experience, Oracle
Program Agenda

1. User research methods
2. Stakeholders interviews
3. How to conduct stakeholder interviews?
4. Stakeholder interview questionnaire template
5. How to use data from stakeholder interviews?
Discovery Methods

Stakeholder Interviews
Discovery methods: Collecting user requirements

• There are many user research methods used in the industry
• Some best practices used in Oracle today are:
  ➢ Ethnographic research in the field
  ➢ Interviews and observations with users and stakeholders
  ➢ User scenarios, personas and “day in life” studies
  ➢ Customer feedback sessions
  ➢ Usability testing and eye-tracking studies
  ➢ Surveys and focus groups

Today, I will be covering only the best practices for Stakeholders interviews
Who are the Stakeholders?

• Who are the stakeholders?

A stakeholder in the enterprise world is someone who wields authority over your project. He or she has a vested interest in the success of your project. Knowing who your key stakeholders are is vital for obtaining support for user research activities. Stakeholders can provide different insight of the user population for your study.

Stakeholders in the IT world can be:

– Influencers
– IT Managers
– Decision-Makers
– Subject Matter Experts
– Surrogate Users
– Business Analysts
– Highest paid person’s opinion (HIPPO)

By Sean Silverthorne MoneyWatch June 21, 2010
Stakeholder Interviews

• “Interviews with project stakeholders offer a rich source of insight into the collective mind of an organization. They can help you uncover areas of misalignment between a company’s documented strategy and the attitudes and day-to-day decision-making of stakeholders. They can also highlight issues that deserve special consideration due to their strategic importance to a business.”

Why and when?

- Access to real users is often controlled by stakeholders
- Stakeholders are your gatekeepers to the real users
- Stakeholders are often Subject Matter Experts (SMEs)
- Stakeholders often play the role of the user
- Stakeholder interviews ideally should be conducted before you begin user research
- Though 1x1 is recommended, if you can begin with telephone conversations or group meetings it would still be useful before beginning user research
What can you learn from them?

• Overview of the project
• Overall organization and structure of the company > group
• How your target users fit into the big picture
• Background of the project and history
• Overview of the business processes and requirements
• Business and functional requirements
• Risk factors
• Success criteria
Conducting Stakeholder Interviews

• Step 1
  – Identify the key stakeholders for your project
  – Conduct one-on-one stakeholder interviews before you conduct user research

• Step 2
  – Schedule time with them
  – Explain the nature of your research
  – Collect business requirements from stakeholders

• Step 3
  – Return to the stakeholders for clarifications after your user research
  – Get outstanding questions resolved
Identifying your Key Stakeholders

• Just like its critical to know who your real users are, identifying your key stakeholders is important

• It requires working with the customers and IT partners

• Conduct some exploration upfront with IT personnel

• Develop a list of people based on your understanding

• Validate with the customers if they are the key players

• Usually they will also be people who define the business requirements

• Communicate with them before you begin the formal interviews
Characteristics for identifying stakeholders

- Knowledge level of the domain
- Experience level of the domain
- Responsibility and position
- Leadership role
- Influence on the project
- Alliances
- Resources
Template for evaluating your key stakeholders
Adapt to fit the needs of your project

<table>
<thead>
<tr>
<th>Role</th>
<th>Area of Expertise</th>
<th>Level of influence</th>
<th>Expectations</th>
<th>Success criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIO</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dev Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business analysts</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Planning for your Interview

• Make sure you conduct the stakeholder interviews before your user research
• Identify your stakeholders and introduce the purpose of your research
• Plan your questionnaire with the stakeholders
• Pilot test the questionnaire with a sample of stakeholders
• Schedule time with them – 60 mins – 90 mins
Tips and Tricks

✓ Stakeholders are not substitutes for primary user research
✓ But do not rule out the importance of talking with them
✓ Stakeholder interviews will help you frame your questions for users
✓ Be watchful of assumptions and bias that can stifle innovation
✓ Interview stakeholders to balance out bias
✓ Don’t ask the stakeholders for solutions or take their ideas as final solutions
✓ Remember you are designing for the “real users” not the stakeholders
Stakeholder Interview Template (use this as a guide)

Depending on the knowledge level select the appropriate questions

Objectives
1. What are your objectives for this project?
2. Overall what should this project accomplish for the business?

User Roles
1. What is your role in this project?
2. Who is this product intended for?
3. What is your relationship to the real users?
4. Have you performed this role before? If so how long ago?
Stakeholder Interview Template (contd)

Context of use:

1. What is the current user workflow?
2. What improvements would you like to see to this current workflow?
3. What tools do the users use today?
4. What have you heard is the most pressing problem for the users?
5. What kind of training do the users go through today?
6. What are your top 10 requirements for this project?
Stakeholder Interview Template (contd)

Success Criteria:
1. How would you personally define success for this project?
2. What are your specific usability criteria for this project?
3. Overall what would you wish this project to accomplish?
4. What could be some challenges to look for?

Follow ups:
1. Is there any documentation, MRD, BRD, Functional Requirements, competitive analysis documents you can share with us?
2. Are there any other stakeholders or users we should be talking to other that the one’s on our list?
3. Can we follow up with you after our interviews with the users?
Data analysis from Stakeholder Interviews

• Data analysis from stakeholder interviews can provide you with:
  – Insight to a holistic view of the project
  – Business requirements and User requirements
  – Assessment of the project scope
  – Mental models of IT business leads
  – Expectations and assumptions of the business leaders
  – Challenges for realizations of the business requirements
  – Success criteria
  – Usability criteria
Resources for Stakeholder Interviews

Resources in **UX Direct**:

1. Example of Interview Questionnaire
2. Template Stakeholder Interview Questionnaire
3. Artifacts to collect
References

• Just Enough Research; Erika Hall, A bookapart


