

Gaining Market and Customer Insights through In-Depth Interviews



Week Five



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Course Syllabus

Week	Learning Objectives	What You Will Learn	Attachments	Assignment
1	Define the scope of the research project Create an issue tree	<ul style="list-style-type: none"> How to frame up the project, in order to socialize it with your co-workers / supervisor / client, and gain consensus on what problem(s) you are trying to solve with the research Definition of an issue tree, how to construct one, and what level of detail to include at this stage 	<ul style="list-style-type: none"> SCQH article Issue tree example 	Create SCQH and issue tree
2	Describe the target personas	<ul style="list-style-type: none"> How to create persona profiles, and how to prioritize which persona(s) should be targeted for research 	<ul style="list-style-type: none"> Persona templates 	Create persona document
3	Create an interview guide Recruit customers for the research	<ul style="list-style-type: none"> What constitutes a good interview guide for particular lengths of interviews (e.g., 30 minutes vs. 60 minutes), how to start and end an interview, and the importance of open-ended questions Methods for identifying, soliciting and securing agreement from your interviewees 	<ul style="list-style-type: none"> Interview guide example 	Create interview guide
4	Conduct phone, video or in-person interviews	<ul style="list-style-type: none"> How to prepare for a good phone interview, as well as processes and technologies to help them be successful 	<ul style="list-style-type: none"> Best practices when conducting an interview Recording of past interviews 	5-10 minute audio / video recording of a mock interview
→ 5	Analyze interview transcripts Identify recurring themes, voices and key takeaways	<ul style="list-style-type: none"> The value of recording and transcribing interviews, and a method to identify the right data contained in the interviews How to "boil the ocean" and pull-out the most-important messages from the body of interviews 	<ul style="list-style-type: none"> Transcript examples Affinity diagrams 	Read three transcripts and develop an affinity diagram
6	Develop a report of the research	<ul style="list-style-type: none"> Common report templates and storylines, and how to frame the results appropriately for the audience you're presenting to 	<ul style="list-style-type: none"> Final report examples 	Slides or document summarizing market intelligence gleaned from research



Where are we in the Masterclass?

- Last Week
 - Preparing for the interviews
 - Tips for successful interviews
- This Week
 - Reviewing and analyzing transcripts
 - Developing affinity diagrams



Method for Reviewing Transcripts

1. Create a spreadsheet with these column headers
 - Person
 - Statement / Quote
 - Theme or Category

Person	Statement / Quote	Theme

2. As you read a transcript, copy and paste key responses / statements (one per row)
 - Typically, these are direct answers to your questions, but often they're things you hadn't anticipated
 - Look especially for statements that have emotion in them; either very positive or very negative
 - *NOTE: You'll be using these statements later when you present your research, so capture statements that you think will stand-out to your team members*
3. Write a short 3-7 word **theme** that characterizes the statement
 - You will re-use these as you catalog other statements from other people
 - The idea is to identify common themes across the people you interviewed



Example of Spreadsheet

Person	Statement / Quote	Theme
Matthew Broderick	Overall I think they're doing a really good job	Overall Techie Co. has been good
Matthew Broderick	between Will and myself I think we have a really good working relationship	Good relationship with account manager
Matthew Broderick	Surg Co. is not very demanding in regard to IT requirements	Client demands sometimes not that rigorous
Matthew Broderick	I can't even say a contract because there's currently no contract that exists there's no MSA that exists between Key and Techie Co. so, we're actually in the process of reviewing a brand-new service contract between Techie Co. and Key, so it's more a gentlemen's agreement right now interestingly	No formal contract exists
Matthew Broderick	They're responsive	Techie Co. is responsive
Matthew Broderick	we have a on-site engineer that is assigned to us, his name is Dave and Dave is the de facto IT guy here, it's – Dave has been the IT face for many years now	Having an onsite engineer is positive
Matthew Broderick	Each time it happens, and we're trying to avoid this, but each time it happened, Will was on it and had somebody out here, the next morning. Very responsive and really reliable in that regard.	Techie Co. is responsive
Matthew Broderick	There's a little bit of feel of continuity rather than having a pool of 50 people, having a different one each week. That definitely helps.	We like having the same point of contact over time
Matthew Broderick	I'm still trying to wrap my head around in terms of where we're at in terms of cost. Cost is a little bit on the runaway track here. I report to the CEO and that was one of the things that I was immediately tasked with or people voiced, not just my boss, but other people as well. Voice concerns around price and cost of Techie Co. services.	Techie Co. charges high prices
Matthew Broderick	each month that I've been here, there have been massive overages in labor cost. For me, to get a handle of that, I really have to drill down into those tickets and understand what was the ticket for, how much time was spent and what area does that belong to in terms of categorization for us	We feel Techie Co.'s pricing and costs are out of control



Analyzing the List of Statements

1. Develop a list of all Themes you created
2. Count all occurrences of each Theme
3. Sort the list from highest to lowest

How-to Do This?

- Create a pivot table
- Use the COUNTIF function

RESULT

You now can see the most-common themes, which provides quantitative evidence of what your audience thinks

Theme	Frequency
Techie Co. is responsive	7
We wanted a partner who could grow with us	5
Techie Co. admits their mistakes	4
Techie Co. has good people	4
Techie Co. is a one stop shop for IT services	4
Techie Co. solves real problems	4
Techie Co. has our best interests in mind all the time	3
Techie Co. helps us grow and mature	3
Techie Co. is an extension of our team	3

Next Step: Affinity Diagram

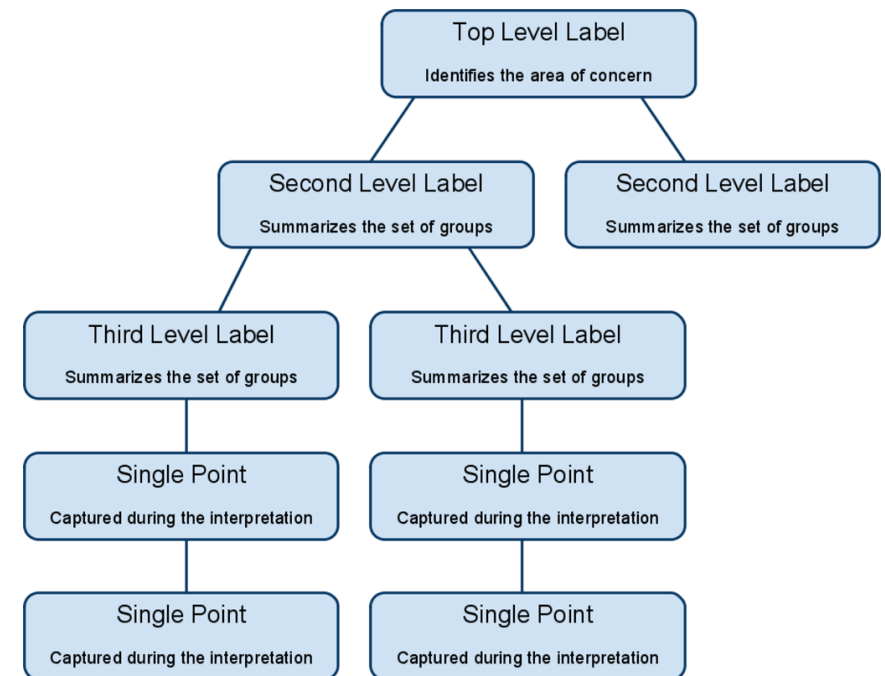
- The Affinity Diagram is a method which can help you gather large amounts of data and organize them into groups or themes based on their relationships¹
- Creating a diagram will help you name, rank and understand relations between groups of information
- Essentially, this is trying to “*see the forest through the trees*”

How to do this?

- Review the ranked list of themes
- Begin to group them into 3-7 higher-level themes

Notes:

- You do not have to place every single theme into a group ... some just won't be a fit and/or are not relevant enough
- This exercise may also help you reduce your overall number of themes, as you may re-categorize some after studying them again in the context of your list



¹Source: <https://www.interaction-design.org/literature/article/affinity-diagrams-learn-how-to-cluster-and-bundle-ideas-and-facts>



Example of Affinity Diagram

Theme	Count	Key Strength / Differentiator	"Real Relationship" Theme	Major Themes	Improvement Areas
Techie Co. is responsive	7	x		Always there for us	
Techie Co. does things that serve themselves sometimes, not their clients	5				x
We wanted a partner who could grow with us	5	x	x	Always there for us	
Techie Co. admits their mistakes	4	x		Trustworthy and honest	
Techie Co. has good people	4	x		Expertise	
Techie Co. is a one stop shop for IT services	4	x		Expertise	
Techie Co. solves problems	4	x		Always there for us	
Overall Techie Co. has been good	4				
Techie Co. can provide just the services we need	3	x		Trustworthy and honest	
Techie Co. has our best interests in mind all the time	3	x		Trustworthy and honest	
Techie Co. helps us grow and mature	3	x		Expertise	
Techie Co. is an extension of our team	3	x	x	Always there for us	
Techie Co. is taking advantage of us	3				x
Techie Co. should stick to their core strengths	3				
Techie Co. works collaboratively with us	3	x	x	Trustworthy and honest	
Having an onsite engineer is positive	3	x	x	Likeable and personable	
ROI is I can buy only what I need	3	x			
We found Techie Co. through a relationship	3				
We pay a premium for Techie Co.	3				



Your Week Five Assignment

- Read the three attached transcripts to this week's discussion post
- Create a spreadsheet of key statements and themes
- Produce a ranked list of themes
- Attempt to develop an affinity diagram: group the themes into a small set of higher-level themes

- Post to the Discussion Group by Monday February 15 at 12:00 PM Pacific

- Review and comment on at least one other member's work



Thanks and good luck!

