

WORKSHEET #4

SURVEY TEMPLATES

Estimated time to create: 30 minutes

Time to complete all surveys: not exceeding 30 hours over two to three weeks

ONLINE INTERVIEW TEMPLATE

THE SURVEY YOU CRAFT ONLINE WILL VARY HEAVILY DEPENDING ON THE PROBLEM YOU'RE TRYING TO ADDRESS AND TO WHOM YOU'RE TALKING. YOU CAN USE THESE QUESTIONS AS A GUIDE.

Also, check out [these tips on how to approach the interview](#).

DON'T ASK FOR SOLUTIONS:

Avoid asking people straight-out to list what they want. Most times, they don't know! Henry Ford of Ford Motors said "if I had asked people what they wanted they would have said faster horses." It's easier and more accurate for them to tell you what problems they're experiencing or trying to achieve and for you to ask about their motivations behind this. Uncovering this information enables you to gauge whether your problem is the one needing addressing, or if you need to tweak it slightly to solve a more pressing problem.

DON'T ASK LEADING QUESTIONS:

Another damper on user interviews is leading or suggestive questions. These are questions peppered with the interviewer's assumptions, which could lead to false results. Keep the questions unbiased and open-ended — like: "What's your impression of using feature X?" instead of "*How easy* was it to use feature X to navigate?". See the interview checklist worksheet to avoid these problems.

TECHNOLOGY:

Make sure to use an online survey software if possible. It will save you time, help you send emails that have the legally mandatory "unsubscribe" link in them, and it will organize the results for you - it's like having your own statistician! We use SurveyMonkey - they have a free account. If you have to have the information stored in Canada, we recommend Fluid Surveys.

SAMPLE QUESTIONS:

Have you experienced "X" as a problem before?

- Yes
- No
- Unsure

Please describe the last time you experienced “X.” What were you doing? How did it affect you? What did you do in response?

Open-ended response

What’s the hardest part about experiencing “X”?

You can have suggested/ assumed answers and leave an “Other” box for people to leave their own answers, or you can simply ask an open-ended question.

What have you tried to fix “X”?

Yes

No

Comment: “If yes, what have you tried and did it work?” [open-ended response]

How would your life be different if “X” stopped happening to you (and/or those you care about)?

Open-ended response

How important is it to you that “X” is solved/ removed/ fixed etc.?

Very Important

Somewhat important

Somewhat unimportant

Not important

Tell us a bit about yourself (remember, these are sensitive questions, think about them before asking them):

Gender:

- Female
- Male
- Transgender
- Prefer not to say
- Other (specify)

Age:

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65 and older

How would you describe the legal structure of your organization?

- None
- Sole proprietorship
- Partnership
- Business corporation

- Co-operative
- Non-profit organization
- Charitable organization
- Community contribution company/ community interest company
- Other (please specify)

Where are you based?

- (location drop-down menu based on the scale of geography you need)

What is your household's total income per year? (be careful of this question, some people are sensitive about it)

- under \$5,000
- \$5,000 and over
- \$10,000 and over
- \$15,000 and over
- \$20,000 and over
- \$25,000 and over
- \$35,000 and over
- \$50,000 and over
- \$75,000 and over
- \$100,000 and over
- \$150,000 and over
- \$200,000 and over
- \$250,000 and over

Ethnic origin:

British Isles origins
 English
 Other North American origins
 Canadian
 Irish
 Scottish
 European origins
 French origins
 French
 Aboriginal origins
 Western European origins
 German
 North American Indian
 Newfoundlander
 Southern European origins
 British Isles, not included elsewhere
 Northern European origins
 Welsh
 Scandinavian origins

Eastern European origins
East and Southeast Asian origins
Inuit
Chinese
Dutch (Netherlands)
South Asian origins
Norwegian
Māori
Italian

WRAP-UP:

Once you finish collecting data, take some time to think about what you learned:

- What assumptions were proven wrong? Which ones were proven correct? Which ones are still unknown?
- Are your beneficiaries more than one group? Perhaps there are multiple groups of people experiencing the same problem, but you can only help one group. Who would you choose and why?
- How has the problem changed? How would you define it now?
- How has it impacted what you thought your product or service would be?
- What do you think it should be now, following what you've learned?

IN-PERSON INTERVIEW TEMPLATE

Interviewer name:

Interviewee name:

Date:

[Give an introduction about yourself, your research, and why you want to solve problem x. You would have already identified that they think they have this problem too. Feel free to write it there. Tell them how long the interview will take, and what will happen to the information. (Will it be shared publicly? Privately within an institution? Kept confidential?) Thank them for their time]

Question 1

First, tell me about yourself! [Have an open conversation about them to break the ice - let it free flow - they may tell you something interesting/ relevant to your research, or not, but this is to get the user comfortable. Feel free to ask them more questions to explain more or elaborate.]

Question 2

I think you're knowledgeable in the area I'm researching so I'd like to learn a bit more about how you are experiencing the problem. Walk me through your experience of... [problem]. [Feel free to ask why for clarity. You will want to re-word this question based on the problem you're testing. Ex: "Walk us through your routine for..." or "Tell us about the last time something went..." Refrain for asking them for the solution to the problem - ask them questions to learn in depth what their struggle and pain is around the problem you're researching]

Question 3

How has this problem affected other areas of your life? And other people in your life? What is the cost to you and your life when this problem happens? [Now you can get more specific about the problem you are trying to solve. Ask open-ended questions about your topic area, and be sure to follow up with, "Can you tell me why that is important?" as often as you can. Focus more on learning about the participant, to understand their real values and needs. Don't start asking about or thinking of solutions yet.]

Thank you so much for your time. [Let them know if you will follow up with them for more information and by what date if that will happen.]

ASSUMPTIONS

(Optional) Take the list of assumptions you created in Worksheet #1 and ask the interviewee about them. See if you can learn more about them through asking the interviewee if those are true for them.

REMAINING QUESTIONS

After completing the survey above, are there any unanswered questions remaining? List them below here to review at a later date.
