TOOLKIT for Making Written Material Clear and Effective

SECTION 3: Methods for testing written material with readers

PART 6

How to collect and use feedback from readers

Chapter 18

Tips for effective interviewing technique

U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services

TOOLKIT Part 6, Chapter 18

Tips for effective interviewing technique

Summary list of tips for effective interviewing 227

Tip #1. Get ready to see the material from the reader's point of view 228

Tip #2. Have reasonable expectations for your interviews and yourself 229

Tip #3. Put participants at ease 230

Tip #4. Encourage participants to say what's on their mind and keep your own opinions to yourself 232

Tip #5. Wait patiently and listen attentively 241

Tip #6. Follow up on what people say 242

Tip #7. Have a plan for what to do if the participant can't read 244

Tip #8. Be ready to deal with common problems that come up 246

Tip #9. Wait until the end to give information or help with problems 248

Tip #10. Work on improving your skills and technique 250

End notes 252

List of figures in this chapter:

Figure 6-18-a. Summary list of tips for effective interviewing 227

Figure 6-18-b. Helping readers "think aloud" by demonstrating with an example 234

Figure 6-18-c. Encouraging participants to mark on the document as they read 238

Figure 6-18-d. How can you stay neutral when you are encouraging people to be candid? 239

Figure 6-18-e. What should you do if the participant is unable to read the material? ... 244

This document is the eighteenth of 19 chapters in Part 6 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).

Summary list of tips for effective interviewing

To help make your feedback sessions enjoyable and productive, this chapter offers practical tips on interviewing technique. We discuss the tips summarized below in Figure 6-18-a.

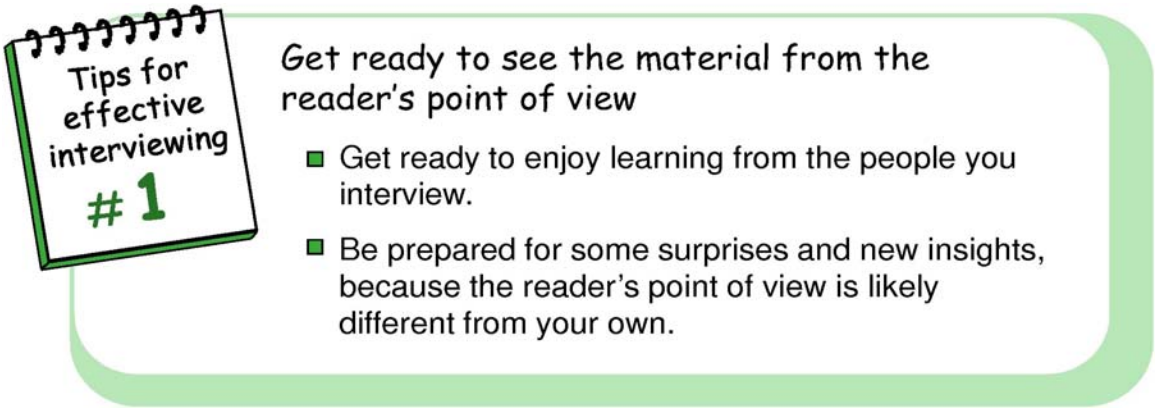
Figure 6-18-a. Summary list of tips for effective interviewing.

Tips for effective interviewing

1. Get ready to see the material from the reader's point of view.
2. Have reasonable expectations for your interviews and yourself.
3. Put your interview participants at ease.
4. Encourage participants to speak up and say what's on their mind, and keep your own opinions to yourself.
5. Wait patiently and listen attentively.
6. For the most useful feedback, follow up on what people say.
7. Have a plan for what to do if the participant can't read.
8. Be ready to handle common problems that come up.
9. Wait until the end to offer information or help with problems.
10 Work on improving your skills and technique.

Source: Created for this Toolkit, based on the writer's personal experiences, suggestions from colleagues, and themes reflected in the literature.

Get ready to see the material from the reader's point of view

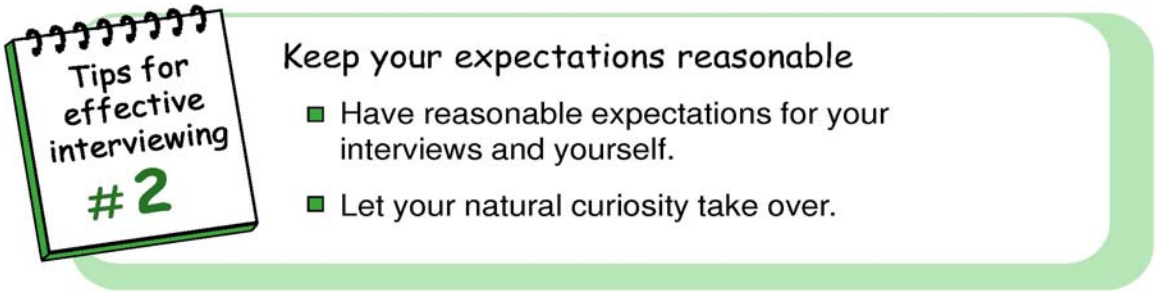


If you have never done feedback interviews, you have a treat in store. You will be amazed at how interesting, informative, and satisfying it is to talk directly with readers and hear them tell you in their own words about their reactions to the written material.

When you go into an interview, remind yourself that you are there to learn as much as you can about the reader's perspective on the material (for more about this, see Toolkit Part 2, *Using a reader-centered approach to develop and test written material*). Don't be surprised to learn that readers see the material differently than you. Sometimes the people you interview will be confused by something that seems clear to you. They might reject a photo or a color scheme because it has negative cultural connotations you didn't know about. They might misinterpret a table or diagram.

Getting feedback like this can be humbling for those who developed the material, but it's exactly what you need to spot problems in the material and figure out ways to fix them. You will get positive feedback from readers, too, that identifies the strengths of the material. When you use the feedback from readers to make improvements, you can build on these strengths.

Have reasonable expectations for your interviews and yourself



Have reasonable expectations for your interviews

You will learn a lot by doing feedback sessions, but don't expect to learn a lot from *every single interview*. When you do a series of feedback sessions, there will typically be a couple of interviews that stand out as exceptionally productive, giving you many new insights. A few might be unproductive. The rest will fall between these extremes. Interviews are dynamic and unpredictable. You won't know until the end how much you have learned from a reader you are interviewing, so be careful not to pre-judge how informative an interview will be.

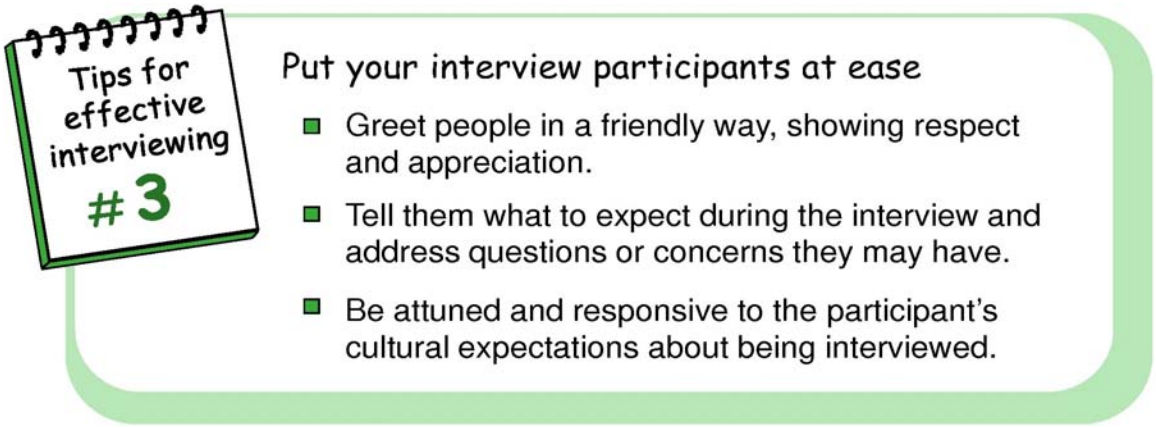
Have reasonable expectations for yourself

When you are the interviewer, you are the tool for collecting feedback. It takes time and practice to develop and refine interviewing skills, so go easy on yourself if you are a beginner:

- It's fine to tell the people you interview, *I'm new at this*. You will find that most feedback participants are patient and eager to do their part to help make the interview go smoothly.

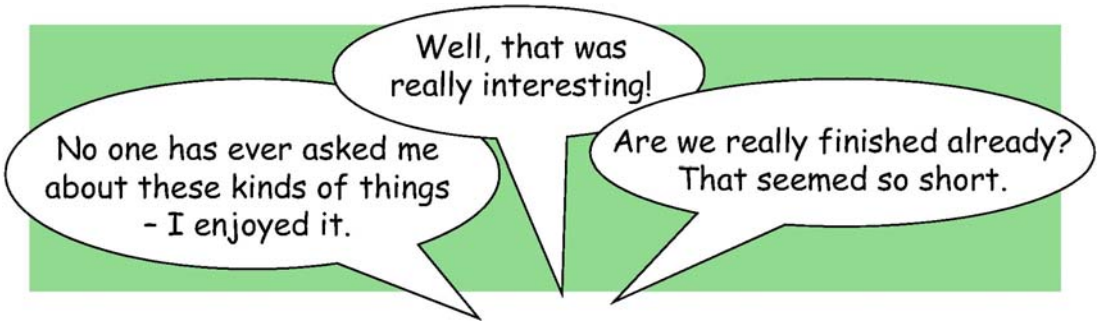
- Stay focused on learning from the participant, rather than thinking about yourself and how you are doing as an interviewer. Just let your natural curiosity take over.

Put participants at ease



Getting feedback from readers is a human interaction, not a mechanical task. The people you interview are giving you their time and attention, and you want them to feel appreciated and respected as individuals.

Putting your participants at ease will make your feedback interviews more productive, because it will encourage participants to speak up and be candid in reacting to the material. When participants feel at ease, they enjoy the experience of sharing their reactions and opinions and being helpful to your project. At the end of the interview, you will probably hear comments such as the ones shown below:



Here are tips on how to put your interview participants at ease:

- **Greet them in a friendly way and make them feel comfortable**. Smile and thank the person for coming to help. Show respect and appreciation.

- **Let them know what to expect.** Most people you interview have probably never been in a feedback session and don't know what to expect. So they sit there, ready to do whatever you ask them to do with the written material, ready to answer the questions you ask. The more comfortable you can make them feel, the more likely they are to open up and tell you what's really on their mind, rather than feeling guarded or uncomfortable about what to say.

- **Anticipate and address questions or concerns they may have.** People who are unfamiliar with reader feedback sessions will generally have two types of concerns:

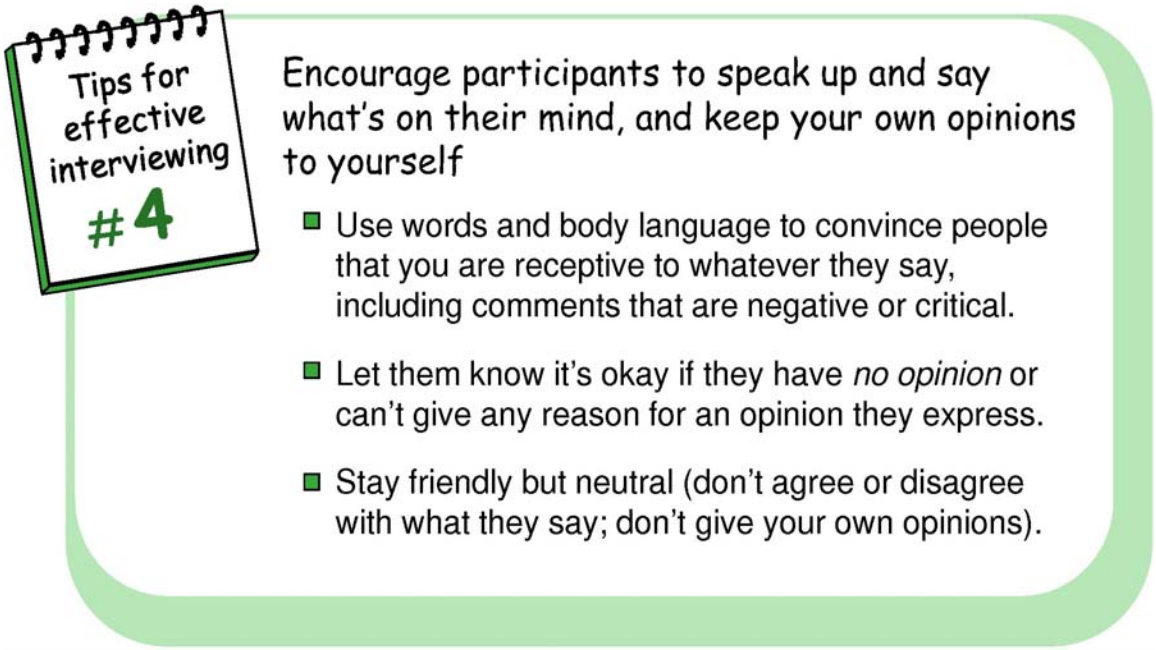
    - **They may feel inhibited about being too critical**. They may associate you personally with the material they are looking at, and may be concerned about hurting your feelings if they say something negative. You will need to convince them that (a) they won't hurt your feelings, no matter what they say; (b) the material is still being developed and it needs improvement; and (c) criticism of the material is especially helpful for figuring out how to improve it. Later in this chapter, Figure 6-18-d gives tips on how to encourage people to be candid.

    - **They may feel like they are being tested.** When you ask questions about the material or have readers use it to perform tasks, readers may begin to feel as if they are being tested. You are well aware that it's the material you are testing, not the participant. But this distinction can easily be lost on a participant who has never been asked to give feedback on written material. You will need to watch for signs that a reader is feeling inhibited or intimidated, and take action to put the person at ease.

- **Adapt your interviewing approach to suit the participant.** For example, to put some people at ease and establish good rapport, you may need to take a slower pace or devote a little extra time to informal conversation. As you gain experience in conducting feedback sessions, you will become more skilled at recognizing a particular participant's expectations about a comfortable interviewing style and adapting your approach accordingly.

- **Ask if they have any questions**. When you conduct a session, you will be using a written interview guide for reference (see Chapter 10, *Creating a written guide for conducting feedback sessions*). This guide typically has a list of points you need to cover during the introduction to the session. When you have finished your explanation, be sure to ask if the person has any questions.

Encourage participants to say what's on their mind and keep your own opinions to yourself



In this book, we emphasize how the way you word your questions can influence the way that people answer. Chapter 8, *Phrasing your questions to get the most useful feedback from readers*, covers this topic in depth, giving guidelines and examples of the most effective ways to ask questions.

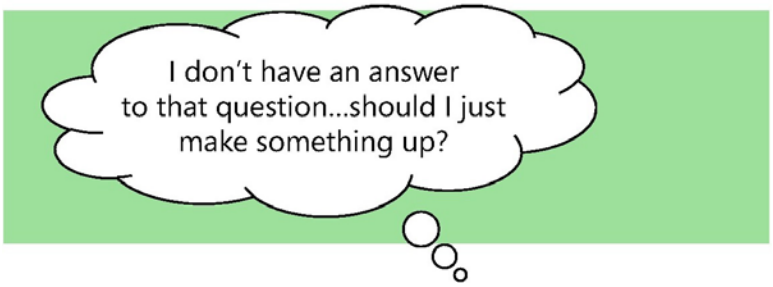
While question wording is crucial, so is the way you ask your well-phrased questions, not to mention how you respond to the answers you get. To encourage participants to give their full and honest feedback, you will need to be **friendly yet neutral**. If you seem to be reinforcing a particular type of answer or point of view, you might inhibit people from being candid or steer them toward a particular type of answer.

So when you are interviewing people, let people know through your body language and your words that whatever they think and say is fine with you. Here are tips:

- **Be aware of your facial expressions and other body language, and do your best to keep them neutral.** Nodding your head, raising an eyebrow, and other expressions and gestures can subtly signal approval or disapproval to the people you are interviewing – regardless of the words you use.

- **Let people know it's okay if they have no opinion.** To avoid the kind of situation shown below, you may need to say something explicit, such as *If you don't have an opinion about this, that's fine, so feel free to just say so.*

This is something you hope your feedback participants will **not** be thinking to themselves:



- **Let people know it's okay if they are not able to give a reason for an opinion they express.** People can often tell you whether they like something or not – such as a color scheme or overall look, but may not be able to say anymore about their preference other than just to state it. Be cautious about probing too much if you are asking for preferences that involve matters of personal taste.

- **Keep your own opinions to yourself.** You have your own opinions, of course, but it's important to set them aside during a feedback session. Stay neutral and take special care to come across as receptive and non-defensive. If participants sense that you are disagreeing with or dismissing what they say, it will undermine your purpose – which is to see the material through your reader's eyes.

Helping people feel comfortable about "thinking aloud"

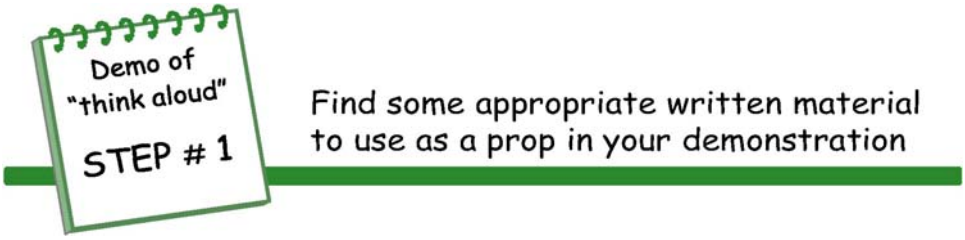
When you are getting feedback from readers, it can be very informative to have them share their reactions by "thinking aloud" as they read the material (see Chapter 3, *Introducing four methods of getting feedback from readers*). It's typical to invite readers to "think aloud" at the beginning of a feedback session.

For many participants, the idea of verbalizing their thoughts as you sit listening will seem a bit unusual, and they will need guidance and encouragement. To put people at ease and get good results from using the *think aloud* method, it helps to explain what it actually means to share your thoughts aloud. One option is to give the participant a chance to practice first, using a different piece of written material that's familiar. For example, you could give them a restaurant menu and ask them to share their thoughts aloud about how they decide what to order.

An easier way, and one we think works better, is to have the interviewer give a brief demonstration. Giving a demonstration is a direct way of coaching participants on what you'd like them to do. Figure 6-18-b below gives an example.

Figure 6-18-b. Helping readers "think aloud" by demonstrating with an example.

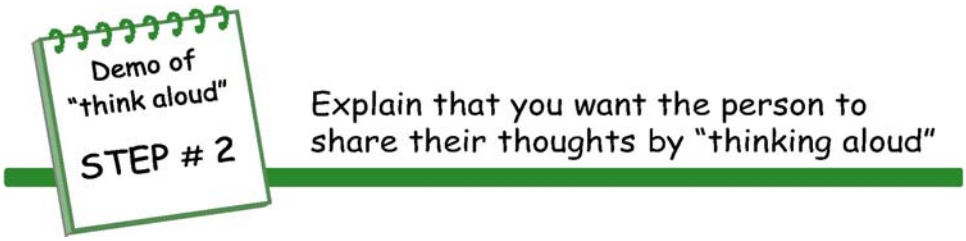
To help interview participants feel comfortable about sharing their thoughts aloud, try modeling how it works. You will need to adapt your approach to suit your project and its participants. Be careful not to make your demonstration too long and detailed. The goal is to help people understand the task and feel comfortable about sharing thoughts aloud, not to create a burdensome expectation for continuous, elaborate commentary. Here are tips on how to do it:



You will need a prop to use in your demonstration because you don't want your demonstration to prejudice how readers respond to the material you will be showing them. Select something that is appropriate for the participants. Ideally, **it should differ in content from the material you are testing, but be similar in other respects**. For your prop, try to find a piece of written material that is similar in size, format, level of reading skills required, and general appearance.

- For example, if the material you are testing is a simple black and white patient instruction sheet, you would not want to use a slick full-color magazine as your prop for a demonstration of think aloud. The contrast between the two documents would be too great, and seeing the full color spread first might bias the responses you get to the instruction sheet.

- If you are getting reactions to material that has some unusual physical feature, such as an unusual size or folding scheme, it helps to model with something that also has this characteristic. For example, suppose that you are doing feedback sessions to get readers' reactions to a community health resource guide that will be distributed as a newspaper supplement. You could use a booklet of television listings from the Sunday newspaper for the think-aloud demonstration, because this is a close match.



sample script from an interview guide

INTERVIEWER: Explain about "think aloud":

I'm very interested in hearing your thoughts and opinions, and would like you to share them with me by **thinking aloud**.

Whatever you are thinking to yourself as you read the material, just say it out loud. This lets me know right away about things you're noticing and reacting to -- while it's still fresh in your mind.

Once you've shared a thought aloud, just keep right on reading. And then later, when you're finished reading, we'll talk about your reactions.

Model the type of commentary you want to encourage by giving your own *think aloud* comments on the material you have selected to serve as your prop.

- As shown below in the sample dialogue for a demonstration, the *think aloud* commentary you model should **include some details and explain some reasons why**.
- **Try to include a realistic example of forming and then correcting a mistaken impression, or changing your mind about how to interpret something in the material.** This will signal to the participant that you are interested in the details of whatever he or she is thinking, and that the process they follow and comments they make don't need to be consistent or orderly.

What the interviewer does:

The interviewer puts a booklet of weekly television listings from the Sunday newspaper on the table where both the interviewer and participant can see it.

The cover has a large photograph of the cast in a new show.

What the interviewer says:

To show you what I mean when I ask you to share your thoughts aloud, I'm going to use these TV listings as an example.

Here are my own thoughts aloud as I look through these listings:

I'm looking at the picture on the cover now, and wondering who those people are. Looks pretty interesting. Oh no— it's not interesting –it says they're in a new science fiction show that starts this week, and I don't like science fiction.

What the interviewer does:

The interviewer starts flipping through the pages.

What the interviewer says:

Well, the main thing I like on TV is the movies.

So now I'm looking for whether there's a list somewhere that shows all of the movies for the whole week.

There doesn't seem to be one. Maybe there's some kind of contents page that will tell me.

What the interviewer does:

The interviewer turns back to the beginning of the TV listings, and then points at a particular spot on one page.

What the interviewer says:

Oh there it is – this says movies are on page 22.

Funny I didn't notice that before. I guess I was looking at that picture on the other page instead.

Source: Created for use in this Toolkit, based on the writer's personal experiences and on suggestions from colleagues, including Elizabeth Hoy, Holly Smith Mirenda, Penny Lane, Mark Evers, and Roger Levine.

Expect a range of reactions from people when you ask them to "think aloud"

While it helps to provide this type of demonstration, keep in mind that the *think aloud* method of collecting feedback works well with some people and not with others. It does not work well for people who find it difficult to split their attention between the task of reading and the task of verbalizing the thoughts they are having about the material. This includes people who have limited reading skills and people who need to concentrate heavily on what they read.

You should also expect a wide range of reactions and individual variations in how much people say during *think aloud*. Some people will offer a detailed commentary as they go through the material, and others will make only a brief comment or two. Some readers never feel comfortable enough to share their thoughts aloud. Others who feel comfortable about thinking aloud may get absorbed in reading and forget to do it. They will need an occasional reminder from you.

Encouraging participants to mark on the document

Another good way to help people feel comfortable about sharing their reactions to written material is to empower them to write directly on it while they are reading. See below for suggestions.

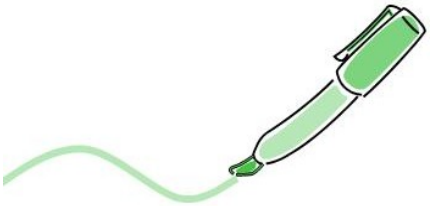


Figure 6-18-c. Encouraging participants to mark the document as they read.

Participants in a feedback session take their cues from you. Unless you give them specific permission and encouragement, they will probably be reluctant to write on the material you show them. For some people, writing on the document can be a very useful way to give you their feedback. The sample script below suggests ways to encourage them to mark the material.

sample script from an interview guide

INTERVIEWER: Give the person a colored marker pen:

Here's a pen for you. While you're reading this leaflet, please use it to mark things that you notice:

- You can mark or circle things that are not clear.
- In particular, I'd like you to mark any part where you **stop and go back** to read something again to figure out what it's trying to say.
- You can also use the pen to mark words or other parts that you think might be confusing to some people – even if you understand them yourself.
- If you think there's a better way to say something, feel free to write down the words you think the writers should use.
- And you can also use the pen to mark parts that you like or think are really good.

I'm interested in hearing what you think about the way something looks, or the words, or anything else – it's all helpful!

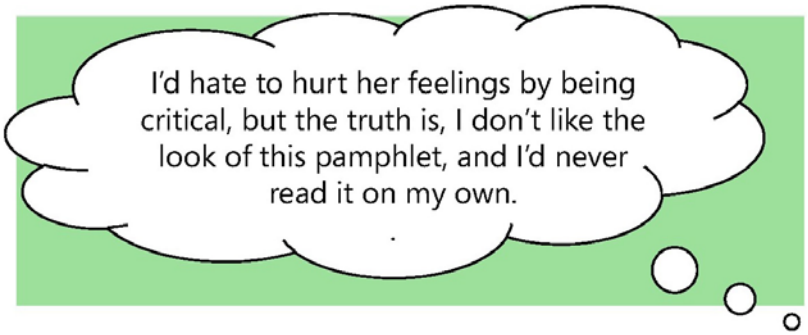
Source: Created for this Toolkit, based on the writer's personal experiences and on suggestions from colleagues, including Elizabeth Hoy, Holly Smith Mirenda, and Penny Lane.

Encouraging people who seem reluctant to be critical

People are sometimes wary about criticizing the written material you show them in a feedback session. Figure 6-18-d below gives examples and tips on how to encourage people to be candid, yet do it in a neutral way.

Figure 6-18-d. How can you stay neutral when you are encouraging people to be candid?

As shown in the example below, feedback participants sometimes hold back on being candid.



Participants might be holding back because they think the interviewer might take the criticism personally (as in the example above: "I'd hate to hurt her feelings"). They also might be waiting to see whether the interviewer really means it when he or she says to share what's on their mind.

To help people feel more comfortable about being candid, you will need to convince them that you won't take criticism personally and that you really do want them to be candid. In some situations, it can help a lot to say something receptive and encouraging the first time a participant offers any criticism, such as "you're giving great feedback," or "your comments are so helpful."

When you encourage participants to be candid, you can do it in a *neutral way* by reinforcing the *act of giving of feedback* – as opposed to reinforcing the specific feedback that was given. Here's an example:

In the example above, the interviewer does a number of things to reassure and encourage the participant:

- **Without agreeing or disagreeing with his specific critique, she strongly reinforces him for giving criticism.** She does this by explicitly thanking him and telling him that his comments will help the developers of the material a lot.

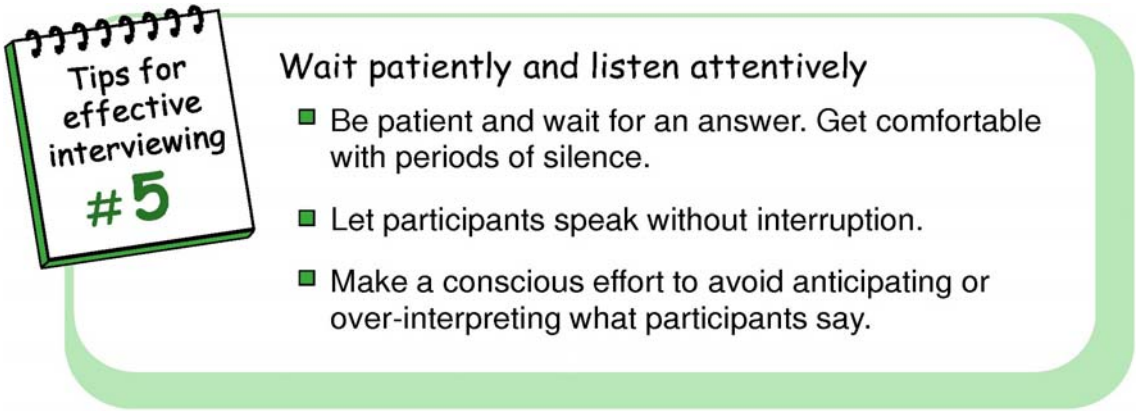
- **She distances herself from the material**. To help him understand that she won't take criticism of the material personally, she distances herself from the developers of the materials by saying *People who are working on this information sheet*.

- **She explains why criticism is needed and appropriate.** The interviewer explains that feedback will be used to improve the material. She does this by saying that the developers need to know about problems with the material and want to make it better.

- **She invites further criticism**. By including the phrase *and any others you notice*, she invites him to identify other problems with the material.

Source: Created for this Toolkit.

Wait patiently and listen attentively



This tip urges you to wait patiently for people to talk and listen carefully to what they say:

- **Be comfortable about having some periods of silence from time to time during your interviews.** Sometimes people need to collect their thoughts before they answer a question you ask. Don't rush them. By waiting patiently, you can avoid a lot of common problems of interviewing, such as saying "okay" repeatedly when it isn't appropriate.

- **When people do speak, let them talk without interrupting them.** Cutting off what a person is saying is rude and it may cause you to miss something important. Interruptions distract people from what they are thinking. When you interrupt the participant, you signal that you are not interested in what they were trying to say, or feel it's not important. Interruptions by an interviewer tend to inhibit people from saying what's really on their mind, especially if the interruptions are frequent. People tend to get discouraged and give you briefer answers that are much less informative.

- **Listen intently to what they say.** When you listen carefully, your understanding will improve, you will feel more relaxed, and you'll be less inclined to interrupt.

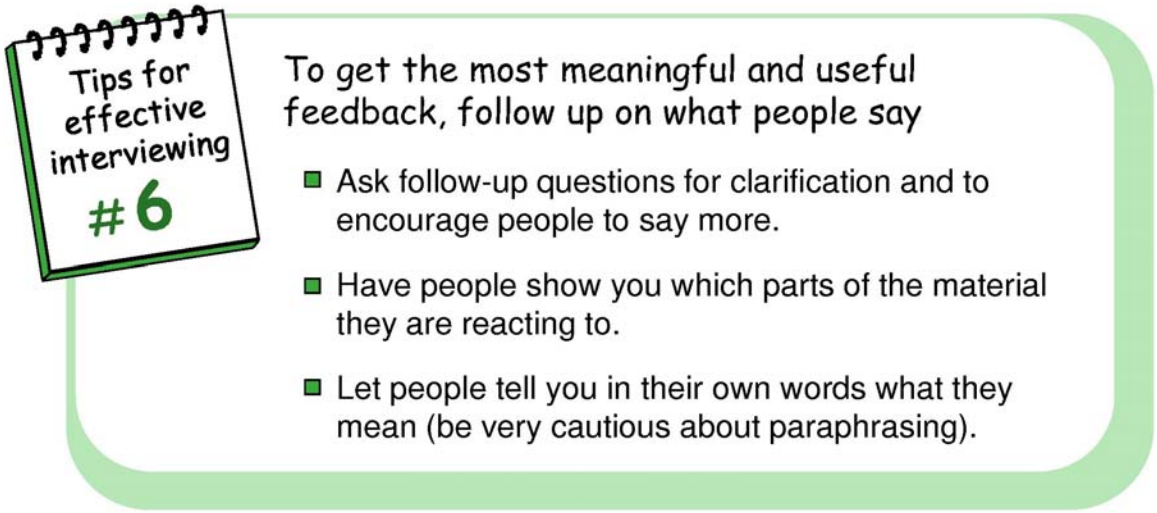
    - When you are a beginner, it can be hard to concentrate on listening attentively. You may be thinking ahead to the next question you need to ask, or distracted by taking notes to capture what the person says. To help focus on active listening, get into the mindset of "I'm talking with a person who is very interesting and I really want to know what they're thinking." People will pick up on your interest and offer more.

  - Listen when they tell their stories. By listening, you show respect, build rapport, and may learn something that's helpful. Sometimes a story that seems like an unrelated tangent turns out to be quite relevant to the material and your feedback issues. Of course, if the interview turns into one story after another, you will need to politely direct the person's attention back to the material.

- **As you listen, make a conscious effort to avoid anticipating what they are going to say.** If you distract yourself by trying to second-guess a response, you may miss what they actually say. If you are expecting to hear a particular response, you may misinterpret what they actually say to fit with your expectations.

- **It's okay to ask a participant to repeat something they have just said.** By asking them to repeat it, you show that you are treating what they say as important. It's also okay to take a little time to pause and write your notes. Again, most participants will be patient with you.

Follow up on what people say



When you are seeking feedback from readers, it's important to go slow in drawing conclusions from what they say. To get the most useful feedback, it helps to hear the reasoning behind people's answers. Use follow-up questions to get them to share more details in their own words. In Chapter 8, *Phrasing your questions to get the most useful feedback from readers*, we describe follow-up questions as indispensable tools in a feedback session. Often, it is people's answers to your follow-up questions that will give you

the greatest insights into problems with the material you are testing. The more you know about how readers are reacting to the material, the easier it will be to use their feedback to make improvements.

You can use follow-up questions to clarify an answer or verify that you have understood. You can also use them to encourage people to give a more specific response or to expand on what they have said. By asking some follow-up questions early in the interview, you signal to participants that you are genuinely interested in hearing more. They may respond by giving more elaborated answers to subsequent questions.

While you want to encourage people to share their thoughts and opinions, you need to be judicious in using follow-up questions. You want to probe enough but not too much: Watch for signals that you are probing too much and need to back off. For example, you may begin to hear a bit of irritation in the person's voice, or the person may end each response by adding, "And that's all I have to say about that." When you are learning to interview, it can be helpful to listen to recorded interviews and pay attention to how the probing was done and how the person responded.

Be cautious about paraphrasing

In general, resist the impulse to paraphrase what readers tell you. Remember that your goal is to get them to engage with the material and share their personal reactions. It's best to let them speak for themselves and tell you what they mean. Once in a while, it might be necessary and helpful to paraphrase something a participant has said. But don't fall into a habit of re-stating in your own words something your participant has just said: **Frequent paraphrasing by an interviewer can undermine rapport by making respondents feel inhibited, inadequate, or frustrated:**

- If you paraphrase and get their meaning wrong, they may decide to let it pass – in which case, you will have misinterpreted their feedback.
- When you paraphrase, they may take your restatement of their words as a cue about how you want them to be responding, and it will lead them in a particular direction.
- If you persist in paraphrasing, you will give them the impression that their own words aren't as good as yours. This may inhibit them from sharing their reactions to the written material.

Have a plan for what to do if the participant can't read

Tips for effective interviewing #7

Have a plan for what to do if the participant can't read

- Be tactful and kind.
- If you can, focus on getting reactions to visual elements rather than text. Consider other options, too, such as reading short passages aloud.
- End the interview early if it seems appropriate.

Since the purpose of feedback sessions is to get people's reactions to written material, ability to read the material is always a requirement for participation. Figure 6-18-e below gives tips on what to do if you discover after a session is underway that the person you are interviewing is unable to read the material.

Figure 6-18-e. What should you do if the participant is unable to read the material?

1 Be alert for signs that a person might be having trouble reading the material

Having trouble reading is a cause for shame in our society, and people with low literacy skills become adept at concealing their inability to read (Willard; AMA 2007; Doak, Doak, & Root, 1996; Osborne, 2005). Sometimes, people with marginal reading skills will make a socially acceptable excuse such as saying that they forgot their reading glasses. They might give the same vague answer to your questions, no matter what you ask about, such as saying repeatedly *it's good* or *it looks okay to me*. If you ask them to read a particular section of the material, they might go through it more quickly than you were expecting because they weren't really reading it. Any of these behaviors could indicate low literacy skills, *or not*. In general, be alert for any indications that the person might be having trouble reading, and be ready to change your approach accordingly.

2 If the participant has trouble reading, be kind and respectful, and adapt your approach.

This is an awkward situation. You tried to prevent it, by stressing that reading would be required during the session (see Chapter 14, Figure 6-14-b, *Tips for recruiting people who will be able to read the material you show them*). But somehow it happened.

Once you realize that the person is having difficulty reading, you will need to decide whether to continue by adapting the interview, or simply end the interview. Take into account the type of materials you are showing, the issues you are addressing in the materials, and the participant.

- If you can, try adapting the interview. Think about which questions in your interview require the least reading, and focus on those. Plan to skip any parts of the interview that require reading large amounts of text.
- But trust your instincts, and don't hesitate to end the interview early if that seems best. If you do end the interview early, be sure to pay the person the full amount of any compensation that has been promised. (For tips on graceful ways to end the interview, see pages 246-247.)

3 As much as you can, focus the interview on getting reactions to visual elements.

People with low literacy skills can easily give their reactions to visual elements that don't require any reading. So if the material contains any photos, illustrations, or other images, focus on those. If you do not have scripted questions planned for these visuals, you can improvise an open-ended question, such as *Take a look at this photo* {while pointing to a specific photo}. *What's your reaction?* Then probe the answer for details, as appropriate. You can also ask for reactions to the color scheme or other visuals.

4 Skip the text-related feedback issues or adapt your approach to adjust for poor reading skills.

Depending on the material you are testing and the literacy skills of the participant, it may be possible to get reactions to parts of the material that have limited amounts of text. If so, you can skip questions that require reading a large amount of text (trying not to draw attention to the fact that you are skipping them) and then get reactions to titles, headings, etc.

If the amount of text to be read is small, it may work to read it aloud for the person. If you choose this approach, just go smoothly into reading aloud, in a respectful, matter-of fact way that

helps preserve the person's dignity and does not explicitly acknowledge that the person can't read. For example, you could say something such as, *Here, let's take a look at this part* {pointing to it}... *It says* {begin reading it aloud}.

5 Is this an isolated incident or does it indicate a problem with recruitment of participants?

If you are doing a series of feedback interviews, it's not uncommon to encounter an occasional participant who lacks sufficient reading skills to participate fully in an interview. But if this situation comes up frequently, check to see if there is a problem with your recruitment procedures. Review the requirements you have set and check on how the screening is working. Sometimes, especially if another organization is helping you with recruitment, those who talk with potential participants do not appreciate the importance of screening for ability to read. Even when you supply a script that addresses the need to read during the feedback session, it's possible that recruiters are not following it closely.

Source: Created for this Toolkit.

Be ready to deal with common problems that come up

Tips for effective interviewing #8

Be ready to deal with common problems that come up.

- Learn techniques to use when interaction with participants is challenging, such as when people are very talkative and get off the topic.
- Trust your instincts, and don't hesitate to end an interview early if it seems appropriate.

When you are conducting a feedback session, you'll want to be aware of and ready to handle typical problems that may come up. For example, sometimes people are too talkative and keep straying away from the topic. There are several approaches that you can try to help regain control of the interview. Whether and how well they may work depends on the person you are interviewing and other factors.

- **One way is to stop eye contact so that you are not reinforcing the person.** You can look down at your interview guide. Sometimes people will pick up on this subtle signal and realize that they have been off on a tangent and not responding to what you asked.

- **Another way is to say something directly to get the person to refocus.** For example, it may work to appeal to their willingness to help you do a good job. You will want to be polite and friendly, but specific about what you want to do. For example, you might say: *What you're saying is so interesting, but I'm getting a little concerned about time. I have so many topics to cover with you, and I feel like we may run out of time before I finish. So I wonder if you would be willing to answer this next question I have* – and then go immediately into asking the question.

It doesn't happen often in feedback sessions, but it's always possible that your participant will react emotionally to the content of the material you are testing, especially if you are testing material that discusses such topics as terminal illness or medical error. For example, the author has conducted a couple of interviews that unexpectedly touched on a memory or topic that was very sensitive for the participant, and the participant started to cry. If this happens in one of your interviews, be patient, apologetic, and respectful. If you happen to be recording the interview, stop the recording immediately. Skip over the topic that caused the emotional response, and ask the person if they would like to stop the session. Take your lead from the person about what to do next.

There are numerous resources on interviewing that include suggestions for handling challenging situations that may arise. Some are textbooks or reference manuals for researchers (for example, Arksey & Knight, 1999; Patton, 2002; Rubin & Rubin, 2005). Others are applied guides for conducting focus groups or interviews. *A Practical Guide to Usability Testing* (Dumas & Redish, 1999) is an excellent resource for this topic of interview dynamics and for many other topics as well. You will find that many of the tips on how to moderate a focus group apply just as well to handling the interviewing in a feedback session. For discussion that includes a wealth of practical tips and examples, see Krueger & Casey (2000) and *The Focus Group Kit* (Morgan & Krueger, 1998; see Volume Four, *Moderating Focus Groups*).

It's always okay to end an interview early

You need to trust your instincts and feel free to terminate an interview early if something doesn't feel right. Perhaps the interview seems to be too stressful for the participant or you sense that the person is not feeling well or is having trouble focusing on the interaction. Whatever the circumstances or reason, if you should find yourself feeling uncomfortable, it's best to end the interview.

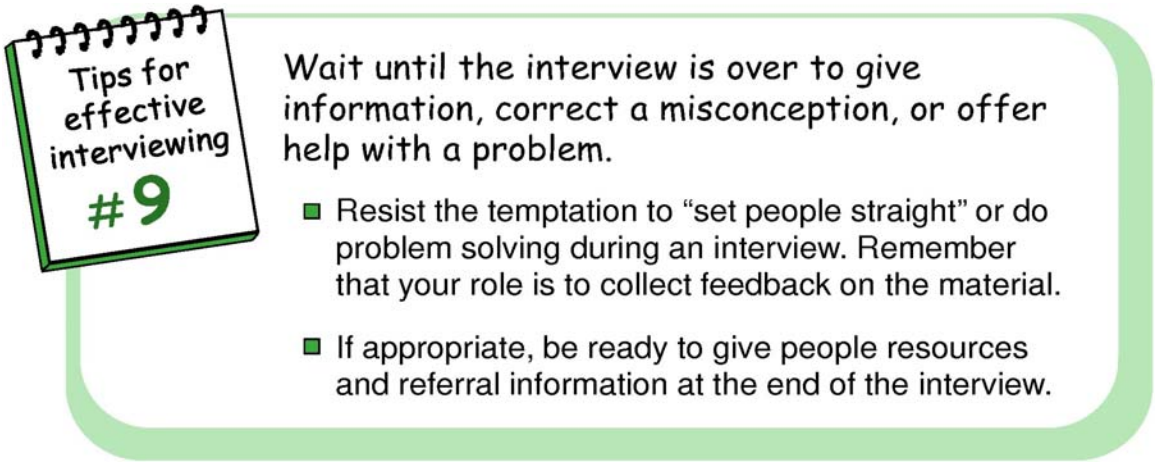
Here are some tips on graceful ways to end the interview early:

- If you choose to end an interview early, your demeanor is important. State in a firm and friendly way that you have now finished everything you need to cover and the interview is over. Then, without a pause, go on immediately into the wrap-up section of the interview guide. Smile and thank the person for coming and for participating in the interview and then take care of any final paperwork that you need to do, such as having the person fill out a demographic questionnaire or sign a receipt acknowledging payment for the session.

- You don't need to give a reason or say anything that draws attention to the fact that you are ending the interview early. In the unlikely event that someone presses you to give a reason, it's diplomatic to give a vague response that avoids any reference to the interview and how it went. For example, you could say, *There was a scheduling problem today, and I don't have as much time right now as I thought I would.*

- If you decide to end a session early (or cancel it altogether), always pay the person as if they had completed full participation. It's the kind and respectful thing to do; it doesn't really matter why the session didn't work out as planned.

Wait until the end to give information or help with problems



When you are conducting a feedback session, there are times when it can be tempting to interrupt the regular flow of the session to offer some personal assistance to the participant. For example, suppose that the participant says something that you know is based on inaccurate information, and you would like to

help out by setting the person straight. Or perhaps the person describes a problem she is having, and you know an easy way to fix it. Or maybe the participant has asked you directly for advice or help, because you are the interviewer and he figures you're an expert on the topic of the written material.

Whatever the reason you are tempted to stop and help out, it's best to wait until the interview is over. If you interrupt the interview to correct a misconception that is related to the material, you run the risk of influencing how the person responds to the material during the rest of the interview. This could defeat the whole purpose of the interview—which is to find out what is working well in the material and what is not. If you pause to do problem solving or share resource and referral information, you will interrupt the natural flow of the interview and you might get sidetracked for so long that you can't complete the full interview. So here are some tips on how to handle situations of this type:

- **Be prepared.** If the topic of the written material is likely to trigger questions or a need for assistance among feedback participants, bring resource and referral information with you. Share it with participants at the end of the interview.

- **If the person asks you directly for help or advice, postpone the discussion politely**. You will have to adapt your wording to fit the situation. Here are examples of possible ways to postpone the discussion: *Let's go back and talk about that at the end. I have information I can give you that might be helpful.* Or, *That's an important question. I'd like to answer it later, after we finish the interview. Here – let me make a note of it so that I don't forget.*

- **Use good judgment about what type of advice or assistance you offer and how you offer it**. Even if you are knowledgeable enough to respond, it may be more appropriate for you to refer the participant to a community agency or other source of help.

Work on improving your skills and technique

To do a good job of conducting feedback sessions, it's important to be yourself. There's no "right" or "ideal" personality type for interviewing, so it doesn't matter whether you are naturally outgoing or quiet, as long as you have strong interpersonal skills. With practice and experience, you will develop and refine your own distinctive interviewing style. Just as you have your own personality and style of interviewing, so does the person you are interviewing have a distinctive way of reacting. Some are naturally outgoing and others are quiet. Some are highly attuned to social subtleties and they will respond to subtle non-verbal cures from you. Others will not notice if you turn your attention away or down toward the interviewer guide. Sometimes it's a good fit between you and the person you are interviewing, and other times it's not as good. One of your jobs in developing skills as an interviewer is to widen the band of comfort and self-confidence you have with different types of respondents.

Work on identifying and controlling your personal vocal and body mannerisms

When you are conducting feedback sessions, it's easy to develop vocal and body mannerisms and be unaware of them. To improve your interviewing technique, make an effort to identify and control your personal mannerisms. Here are some tips:

- **Watch for ways in which you use words in repetitive ways.** If you listen to tape recordings of interviews you have conducted, you might be surprised to hear yourself say words such as *ummm*, *uh*, *okay*, or *all right* over and over again. These habits of speech clutter your interviews and they can sometimes give inappropriate cues to the person you are interviewing (such as saying *okay* repeatedly). Try to identify your own personal mannerisms and then make an effort to keep them under control when you are conducting an interview.

- **Watch for the nuances of your taken-for-granted vocabulary.** For example, you might have the habit of referring to your friends as *you guys*, but some people you interview might find this form of address too familiar.

- **Pay attention to your personal body language and how it might influence the person you are interviewing.** Do you nod your head over and over? You might intend a nod to be a neutral acknowledgment of something the person has said, but the person might think your nod is indicating your approval. Do you tend to fidget a lot? If so, make an effort to keep your body quieter and more relaxed, to help put the participant at ease.

Ask interviewing partners for feedback on your style

If you are learning how to be an interviewer, it's helpful to get coaching and suggestions for improvement from others. And even if you are a seasoned interviewer, there's always room for improvement in your technique. So take advantage of any opportunities you have to get comments on your interviewing technique from others. If you conducted your interviews in two-person teams, ask your partner for feedback and suggestions on how you conducted the interview. After each session, ask for honest feedback and discuss ways to improve. *Was there anytime when you wished I had done something differently? Anything you noticed that might help me improve my style?*

It's generally easier to analyze someone else's performance than to assess your own. This means that you and your partner could help each other a lot by sharing your impressions and suggestions for improvement. Help each other learn and improve by giving specific suggestions to help the interviewer perform better next time. And the better you are at conducting reader feedback sessions, the more meaningful your results will be.

Using recorded sessions as tools for improvement

When you are conducting a feedback session, your attention is focused on the immediate task rather than on how well you are doing as an interviewer. Later, when you listen to a recording or review a written transcript of a session you conducted, you can get insights into your interviewing strengths and weaknesses, and use them to improve next time. You can also learn a lot by listening to recordings or reviewing transcripts of interviews that were done by other people.

- Listening to a recording is especially helpful because it lets you hear tone of voice, both for the interviewer and the participant. Try stopping the recording periodically and pondering what you think the interviewer should say next. Then start the recording again and analyze what actually happened.

- Reviewing the transcript is helpful because it makes it easy to glance back and forth through the session, analyzing the decisions the interviewer made in guiding the discussion, including decisions about when and how to probe.

If you are just learning how to do feedback sessions, try to listen to a recording of your first interview or two before you do any more. If you can, get help from an experienced interviewer as you review the recording.

End notes

CMS joins Toolkit writer Jeanne McGee, PhD in thanking colleagues who shared their experiences, reviewed early drafts of this and other chapters of the Toolkit, and offered many helpful ideas, examples, and suggestions for improvement. See acknowledgments at the end of Toolkit Part 1 and Toolkit Part 6, Chapter 1.

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