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Interview Skills

May, 2011

Strategic Leadership and Change

Organizational Consulting

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Objectives

- To understand why we interview
- To understand the basics of writing interview protocols or interview guides
- To understand logistics of scheduling, and interview preparation
- Guidelines -do's and don'ts of a successful interview
- To understand the documentation and analysis process
- To practice interviewing
- To understand the potholes and pitfalls of the interview process

Why Interviews?

- Soft Entry - Teach us the industry/company/culture/language/power structure
- “ Make a friend” for Katzenbach Partners and the project
 - Build comfort with us
 - Broaden the project constituency
 - Find future client team members
- Gather data on the broad issues
- Be able to demonstrate early learning to key client
- Direct further research

The Interview Protocol or Interview Guide

The Intro

Interviewee Background

General Questions

Specific Questions

Anything else?

Next Steps

- Ask “How much do you know?”
- Give project overview -client, objective, duration, outcomes, interview overview
- Explain ground rules (e.g. notes and confidentiality)
- Introduce yourself

- Objective: to get them talking
- Pitfall: They don’t stop

- Context setting about the general situation
- e.g “Tell me your understanding of the (strategy, purpose of the merger, etc)”
- May include some probes and follow-ups

- About the central issue you’ve come to work on
- e.g. “what’s working about the customer service process -what’s not working”
- Lots of probes and follow up for specificity

- “Anything else that we haven’t asked?”
- “ Who else should we talk to” “What documents should we look at?”

Scheduling and Preparation Logistics

- Scheduling: Ask for client administrative help
- Scheduling: If you are doing it
 - Allow plenty of time to schedule
 - Practice the project overview
 - Get and give contact phone numbers
 - Confirm if a long time in advance
 - Get site directions
 - Remember - secretaries and assistants make the world go around
- Preparation: Read about the company
- Preparation: Know the interview protocol backwards
- Preparation: Plan how you will capture notes
- Preparation: Be on Time!

Guidelines: Do's and Don'ts of a Successful Interview

DO

- Explain the time commitment and check to see if the time still works
- Make them comfortable -joke- self-disclose
- Ask mostly open-ended questions: “Tell me about” “What” “How”
- Listen carefully -summarize and follow the interviewee
- Monitor air time- 20/80 not 80/ 20 -adjust
- Probe for specificity
- Ask (mostly) the same questions interview to interview
- Watch time -abort some questions reschedule to finish if necessary

DON'T

- Forget the introduction and just start asking questions
- Try to be Jay Leno
- Avoid closed ended questions Is/does? (Except for probing)-
- Interrupt or snore when sleeping (without apologizing)
- Say nothing
- Interrogate -e.g. 3 or more probes in a row
- Ask leading questions -letting the first interviews shape your data gathering
- Lose control of the process

Interview Documentation, Analysis, and Presentation

- **Documentation**

- Agree must get information vs. “nice to have” -do a few interviews and recalibrate
- Agree a note taking system-hand written, computers in the interviews, tape recording
- Agree how you will document interviews -e.g. word write-ups due to engagement manager at the end of the day- could someone else analyze your notes?
- Capture notes by question
- Keep a simple “friendliness measure’ for each interviewee

- **Analysis**

- Plan for analysis -e.g. using quotes -e.g. content analysis -quantifying numbers of responses
- If quotes -make sure you get the closest to exact words you can
- When quantifying frequency of mentions be clear about categories first

- **Presentation**

- Positives and Strengths first
- Clarity

Interview Practice

- Purpose:
 - Practice interviewing
 - Learn more about each other
- Process:
 - Interview a colleague
 - 3 questions - Background, Understanding of Company Strategy and Expected contribution -**10 minutes**
 - Switch and be Interviewed - **10 minutes**
 - Reflect on what worked and what didn't -**5minutes**
 - **Discuss**

Pitfalls and Potholes

Pitfalls and Potholes

- Interviewee is off track, too detailed, over time
- Interviewee is hostile or uncooperative
- Interviewee can't answer any of the questions
- You learn about something illegal, immoral, personal
- You mess-up, break confidentiality or somehow break trust
- You find that your notes are not as good as you'd like

Shovels and Ladders

- Try to finesse -look at watch -finally comment on the problem and suggest brevity
- Power-up your friendliness,-finally comment and ask what you can do differently
- Talk about the problem -lack of knowledge or fear?
- Go to your engagement manager
- Admit fault- ask what can be done
- Don't make stuff up! -call to reconfirm info

Alan Cay Culler Background and Connections



Alan Cay Culler

- 30+ years delivering business results as a strategic change consultant
- Specializing in Strategic Leadership, Organization Consulting, Process Change Infrastructure, Leadership Group Work Change Teams and Change Agent Development
- Clients in: Airlines, Chemicals, Construction, Manufacturing, Media, Oil & Gas, Pharmaceuticals

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Connected Resources

- Connections to over 25 independent consultants and executive coaches and several small consulting firms
- Specialists in Strategy, Operations, Organization and Change
- Resources in
 - United States and Canada
 - United Kingdom and EU countries
 - Asia, Hong Kong, Singapore, Japan