

TESSERACT
Management Systems



GUIDELINES

A Basic Guide to Interviewing

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1 INTRODUCTION

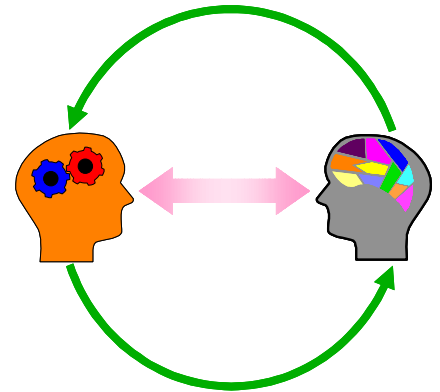
The systematic approach to management is heavily dependent on data. Where possible, the data should be objective, precise and factual.

But life isn't like that, and a lot of the data you will need will be locked up in other people's heads, especially in the early stages of your work to implement systematic approaches.

The purpose of this brief guide on interviewing is to provide some guidance on how best to access that data. However, this is a very brief, pragmatic guide, and while it may serve those who will conduct interviews as part of their role in adopting systematic management, we would counsel those who need a more sophisticated interviewing approach to undertake one of the many interviewing courses that are available to support this.

The structure of this guide is as follows:

- The purpose and problems of interviewing
- Organising and preparing for interview
- Conducting an interview





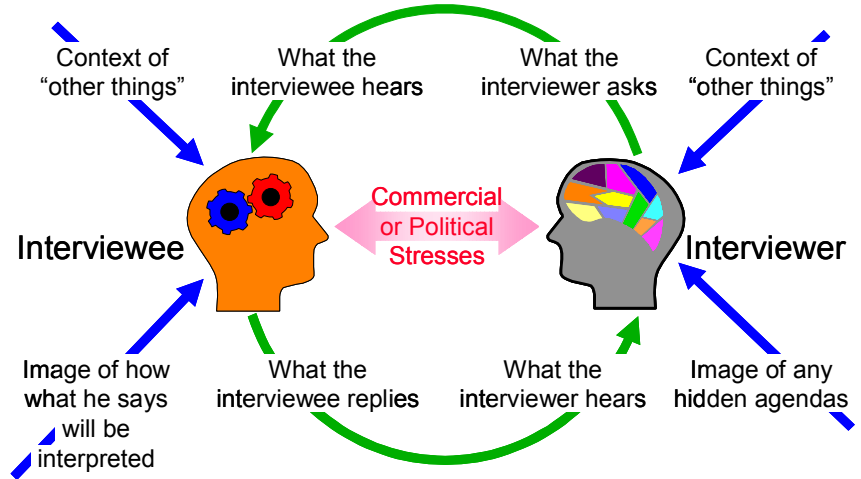
2 THE PURPOSE AND PROBLEMS OF INTERVIEWING

The purpose of interviewing, as it pertains to the purposes to which this guide applies (Part A of 'Managing by Design'), is to develop a clear and accurate picture of what the interviewee understands the situation to be, and the reasoning behind that.

Through developing this picture, the interviewer identifies the sources of evidence and data on which it is based, and can thereby make an assessment of its validity, or set in place plans to corroborate that validity – probably through other interviews.

But things are not quite that simple, and within the interviewing process there is tremendous scope for deception and misinterpretation.

The diagram to the right illustrates some of the potential sources of confusion in the average business interview.



Given such a range of possible interference, it is surprising that interviews are any use at all. But they are, because the primary mechanism to deal with the interference has been almost hardwired into us over all our years of interaction with others.

The most important tools for addressing the interference are:

- Being totally attentive to the interviewee, what he or she is saying, how they are saying it, and what you feel about how they are saying it
- Avoiding all assumptions, and asking the interviewee to clarify what they mean in all situations where you might be inclined to make those assumptions

Key to using the first tool is a process which looks after the interview while you look after the interviewee – in other words a clear and logical structure which allows you to focus on the interviewee and explore their thinking, without getting lost in your own. This is the subject of the next section.

Key to the second tool is a humility that is willing to check your understanding of 'the obvious' is the same as the interviewees understanding of 'the obvious'. This is picked up in more detail in section 4.

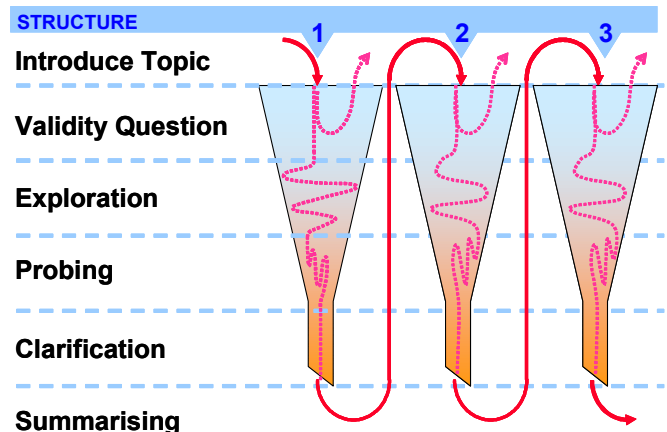


3 ORGANISING AND PREPARING FOR INTERVIEW

The diagram on the right shows the typical flow of a good interview.

The headings down the side of the diagram represent the level of detail in exploring a topic with the interviewee – these are covered in more detail in the next section.

The point of reproducing the diagram in this section is to illustrate how engaged the interviewer needs to be if he or she is to explore the topic fully and accurately. All of your mind should be concentrated on the interviewee, and developing your own picture of what they see.



But then, as you complete that line of enquiry, how do you know what you want to ask next? One experience of forgetting where you are going with the interview in front of a senior and influential Board member or customer is usually enough to not want it to happen again.

One alternative is to keep half your mind on the next question, but the result of this is that you only have half your mind to probe and explore and to understand, and frankly, that simply isn't enough to do it properly. It is easy to spot interviewers who are doing this; they only seem half interested in what you are saying – and that is bad both for rapport and for getting anything other than a surface response.

Another alternative is to have the structure of the interview carefully mapped out before you go into it. An example of what this might look like can be found in the 'employee interview' form, also available from the website – in each section of the form, the structure is clear, and sample opening questions are clearly noted. By this means, the interviewer can immerse themselves fully in the preceding question, and have time to emerge into the next without the pressure of immediately having to regather his or her thoughts publicly.

So the most important part of preparation is to develop a clear structure, with easy prompts, that covers all the ground you need, and allows you to focus your whole attention on the interviewee and the current line of questioning.

The structure sets you free!

Some tips on developing an interview structure from scratch are:

- Try to group like topics together, and to create a logical flow through them
- Start with the topics that are most likely to be discussed easily and with enthusiasm, and leave the more challenging topics towards the end of the interview
- Test out the interview structure a number of times before using it for real
- Create a combined question and response form that allows you to note responses easily, but also keeps you informed of the next part of the structure and how to get into it easily.

The other aspects of preparation largely concern the interviewee, the location, and your own diary.



- Ensure the interviewee will be available for the whole length of the interview, and that it will be possible to conduct it in appropriate surroundings
- Ensure the interviewee understands the purpose of the interview, whether it is confidential (or non-attributable) and what will happen to the information from the interview
- Sort out your own diary so that you can be sure that you will not be late, or have your mind still cluttered with the outcomes of the last interview.



4 CONDUCTING AN INTERVIEW

An interview has essentially three parts to it: the beginning, the middle and the end. Much of this section is concerned with the middle, but it is very important to get both the beginning and the end right as well, and so we will start by considering each of these.

The beginning is key to establishing rapport with the interviewee – a level of trust and expectation that will do much to limit the sources of interference explained in section 2. Rapport is built in a number of ways, and experienced interviewers use both verbal and non-verbal mechanisms to put the interviewee at ease. In this brief guide however, we will just focus on the basics:

- Introduce yourself, and engage briefly in pleasantries while you and the interviewee get comfortable
- Ensure they understand the reasons for the interview, ideally by referring to a memo that they have received in advance of the interview
- Explain the structure of the interview, so that they can see what they will be asked, and which are the most appropriate points to introduce things they are already thinking about
- Reconfirm the length of the interview, and check that this is still suitable for them
- Recap on confidentiality and what will happen with the data
- Apologise in advance for the fact that you will ask naïve questions, and explain that this is because you really want to understand what they think, not what you assume they think
- Lead into the first question.

The end of the interview is not as important as the beginning, but there are a number of courtesies to be followed if you are not to damage the pitch for next time:

- Ask if they would like to read through the notes you have taken, so that they can check that you have understood things correctly
- Ask if there are any points that they believe are missing or would like to add
- Thank them for their time and help
- Restate any points concerning confidentiality and what happens next
- Thank them again, and close the interview.

The middle of the interview is a matter of working through the structure you have developed, according to the process shown on the right, and explained below.

Having introduced the topic (very briefly) it is important to check that the topic is relevant to this interviewee – for instance, by asking if they have any knowledge of that area.

In the event that it is a valid topic, the next step is to explore their understanding of the topic in more detail. This is normally achieved by means of two or three very open questions (Why..., How..., In what way does...) which cover the breadth of the topic.

Introduce Topic

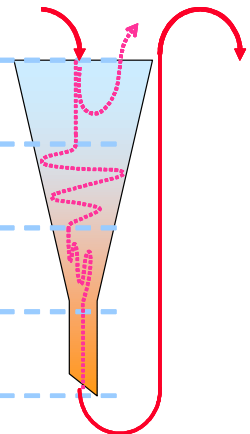
Validity Question

Exploration

Probing

Clarification

Summarising





As the interviewee responds to these open questions, the interviewer seeks to develop a clear picture of what is in the interviewees mind in their own. This leads them to probe certain areas with more detailed questions such as Who? What? When? Where? in order to firm up the picture as it develops.

In this process it is vital to avoid filling in gaps from your own experience, for instance when the interviewee says "We follow a systematic approach to .." it is important that the interviewer clarifies what they mean by systematic – perhaps by asking: "Can you explain that to me in more detail?" (This may appear a closed question, but it rarely proves so in practice)

Other things that need clarifying are when the interviewee refers to things non-specifically, such as 'they' (Who?); or implies a causality that isn't clear such as 'we are forced to..' (How?); or a standard that isn't identified, such as 'it was too expensive..' (Compared to what?).

Summarising is a form of clarifying that enables you to play back to the interviewee what you think you heard. You can do this by means of a number of opening phrases such as: "It seems to you..." "As you see it..." "What I hear you saying..." "From where you stand..." "Let me see if I understand; you.... The final summary is likely to respond in affirmation, and will enable you to move on to the next topic.