

How to Interview Subject Matter

Experts

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EXPERTS

Excellent communication skills are often listed as a prerequisite for a position as a technical writer. Despite this requirement, very few training courses seem to address one of the central components of communication that technical writers use on a daily basis: how to interview subject matter experts (SMEs) to gather information for a project.

This article provides some suggestions for conducting interviews.

Tips and Suggestions for Interviewing

Prepare for Interviews Beforehand

Always walk into a meeting prepared. Respect your interviewee by doing your homework beforehand. This includes reading up on existing material related to the project: the system requirements specifications or marketing documentation, other internal documents, or relevant memos. If you are interviewing a new client, then check out the client's Web site and look at previous manuals to gather background product information.

Provide a Clear, Written Meeting Agenda

Every interview should have a specific purpose and a clear agenda. Keep your meetings focused by concentrating on a single topic or objective rather than attempting to cover everything. Write down the items you wish to cover in the meeting and send this list as a memo to the participant(s) before the meeting.



Schedule Short Meetings

Related to the above suggestion, it is best to keep interviews brief and focused. For example, break an hour session into two half-hour sessions. This enables you and your interviewees to stay focused on the topic at hand. It also enables you to schedule meetings into tight schedules. While many SMEs might feel hesitant about fitting a one- or two-hour meeting into a busy day, most will find the time for half an hour. Knowing that meetings are short will also provide more incentive for the interviewee to arrive on time.

Likewise, it is preferable to have one-on-one meetings, which allow for intense and involved discussions, rather than large meetings attended by several different parties, all with their own agendas.

Interview in a Quiet Place

Interruptions can break participants' concentration and result in long, dragged-out meetings, tiring for everyone involved. So have your meetings away from your office and telephone, preferably in a meeting room where the door can be closed. In some offices, there may be a number of interruptions during meetings. In this case, remind the interviewee in a friendly manner that your time is limited and ask if you can continue.

Structure Meetings

The first five minutes of a meeting is a warm-up stage, during which you greet your interviewee and make him or her feel comfortable and relaxed. During this stage, talk can be informal and unrelated to work topics. If you have a kitchen in the office, offer your guest a drink.

The main discussion covers the topics that you have outlined in the agenda. It is a good idea to have this agenda printed out, and then follow through on each item. Tick off the item once it has been covered. Questions at this stage should be targeted and specific.

During the meeting's conclusion, summarize the action items of the meeting. This period also gives you the opportunity to go through your list to

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make sure that all items have been covered. You should also use this time to schedule the next meeting.

Provide Ample Prompts and Encouragement

This is especially important for reticent engineers, people whose first language is not English, and others who have difficulty communicating their ideas.

Encouragement could be given through a smile or nod to prompt the speaker to continue. Even if you don't fully understand what has been said to you, or the speaker is not clear or coherent, don't panic or become frustrated. Give him or her the opportunity to speak.

Start with easier, more closed-ended questions (see next section) that can warm up your speaker and get him or her to start talking. Sometimes, asking questions about which you already have some understanding of the answer can help to build trust in your capabilities.

Learn to Listen Carefully

Listen carefully to the content of the discussion, but also pay attention to the speaker's tone of voice, emphasis, and body posture, which can provide important clues—not only to the information, but to how the person views it, and to the interview process itself. Don't interrupt unless you feel the need to prompt or to ask follow-up questions. Avoid making assumptions until you have heard the complete story. Maintain eye contact and a relaxed but upright posture to

establish rapport and indicate that you are paying attention. Avoid fidgeting or shifting in your chair, which could be interpreted as signaling restlessness or boredom.

Understand Your Interviewee's Communication Style

Occasionally, you may need to adjust your interviewing style to suit the needs of a particular interviewee.

Some speakers like to feel that they are in charge and will attempt to dictate the nature and content of the meeting, refusing to answer questions or clarify ideas until they have finished speaking. Try to be flexible, as long as you can gather your information and understand the topic. Write down notes or questions and address them as soon as you can.

Other speakers may be totally reliant upon you to provide the structure and content of the interview. The advice in this article will enable you to do this in a professional manner.

Ask Lots of Questions

Many beginning writers are afraid to ask questions for fear of appearing ignorant. However, questions are the main tool that technical writers use to gather and clarify information. Use questions often, for a number of purposes:

- To get information on a specific topic
- To clarify a statement or ask for it to be repeated
- To get information on a related topic
- To challenge basic assumptions

Use both open- and closed-ended questions. An open-ended question allows the interviewee to clarify and explain. For example, "Can you explain to me how the database replication mechanism works?" is an open-ended question that provides the opportunity for a full answer, in the interviewee's own words. A closed-ended question looks for a specific yes/no or amount answer. For example, the answer to "Is the database replication feature supported?" is either yes or no. The question, "How many records can be added to the database?" prompts the interviewee to answer with a specific amount.

Another way to approach the issue of asking questions is to use the 5W2H technique:

- *Why* is this feature required? Why is it needed?
- *Who* is going to use it? Such a question gathers information on the purpose of a feature and who the users are.
- *What* does this feature do?
- *When* is the feature used?
- *Where* does it fit into the work flow?
- *How* is the feature used? This question elicits the specific steps required to implement the feature.
- *How often* is the feature used? For example, is the procedure one-time-only or administrative in nature?

Rephrase in Your Own Words

This technique, called reflection, is often used by psychologists to clarify what people mean. In this method, you repeat back what the person has said to you in your own words. For example, you may say, “So what you are saying is that if the user wants to add a record to the database, he needs to first....” This is a great technique not only for clarifying what someone else has said, but also for committing it to memory.

Take Ample Notes

You may remember scribbling furious notes to keep up with a lecturer in your school days. You may also remember your lecturers insisting that you listen first and understand the ideas before taking notes. This advice is always good. The playback technique discussed above can help you clarify and commit information to memory before taking notes. Your next task is to record this information so that you won’t forget it.

Notes should focus on concepts and ideas rather than specific sentences, unless this is a review stage and the interviewee is providing suggestions on how to phrase or explain something.

You should have a clear system in place for taking and organizing your notes so you can record them quickly and find them easily later.

Some people use a personal digital assistant (PDA) or a digital notepad to take notes. The advantages of a PDA are that it is easy to carry around, easy

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to use, and can be interfaced with your regular PC.

For my own purposes, I find it quite adequate to have an A4-size bound notebook. I write the topic and date at the top of the page, underlined, and the names of the participants. I then divide the page into subtopics and underline each one.

When reviewing existing material, I bring a printout of the relevant sections to the meeting and mark it up directly, either at the place where the change is to be made or on the back of the page.

When taking notes, I prefer to use keywords and short phrases, backed up by diagrams where appropriate. The keywords and diagrams act as mnemonic devices, enabling me to recall the context and concepts discussed.

When I consider it important, I write down detailed notes and ask the speaker to repeat him- or herself until I have it right. This way, I can be sure that I will not have to ask for the entire explanation again at a later stage.


Some people take voice recorders into interviews and record them in their entirety. I would recommend this technique only for lengthy lectures when you are not familiar with the material or are not the only person being addressed. Playing back an entire conversation after an interview can be very time-consuming.

Provide a Summary

As the meeting concludes, you should incorporate a brief summary in which you check off each item that was on the agenda, assign action items, and determine if any outstanding items need to be addressed in another interview.

Write up the meeting summary and present it to all participants as a memo after the meeting.

An Art and a Science

Interviewing is probably one of the primary components of your day-to-day tasks as a technical writer. Interviewing is both an art and a science. Skill, as with any other endeavor, comes with practice. To approach your interviews in a professional manner, it is important that you be familiar with some of the fundamental principles of human interaction and communication. A well-structured interview gives both you and your interviewee confidence in the process and helps to enhance your professional status. 

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