

How to prepare a customer interview

The most dreaded part of case study writing



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- The most essential part of the case study writing process.
- The interview will make or break your case study.
- Your case study will only be as good as the questions you ask.

A customer interview is not a journalistic interview

- Think of it as a conversation.
- You need to make both the seller and the buyer look good.
- However: we can use journalistic techniques to run our interview.

Expect the unexpected

No two interviews are the same.
Be prepared to improvise.



Readiness is all...

Prepare an interview the best you can.



Research the hell out of your customer interview

The buyer / seller

- Customer's website
- Social media

The product / service

- Features & benefits
- Applications

The interviewee

- Job title
- Position in the company

The market

- Trade publications
- Trends, recent news

Make clear arrangements

- Confirm time & date & send reminders.
- Make enough time, so you don't need to be stressed.

Brief the customer (buyer)

- Send a few basic interview questions up front.
- Give the customer time to prepare.
- Make the interviewee feel comfortable.
- Avoid 'We'll have to get back on that.'

Brief the customer (buyer)

DANGER: interviewees who are overprepared and lose spontaneity.



E-mail, phone or personal visit?

Personal visit > Skype/phone > email

Record or write? Or both?

Writing

- + You listen more actively
- + writing = remembering better
- + You already have all the notes to start writing.
- Hard to combine writing and listening.

Record or write? Or both?

Recording

- + Miss nothing, concentrate on the conversation
- + Double-check quotes afterwards
- + Foreign speakers
- + Most interviewees forget the recorder is on
- + Handy when interviewing in the car, on a walk, factory tour, at the golf course, etc.

- Interviewees are intimidated
- Type out everything afterwards
- Over-quoting
- Technology

Record or write? Or both?

Writing and recording

- + Only write down the most important key words
- After a while you forget to write.

Test your tech

- You only get one shot!
- Microphones, cameras, recording software
- Make sure you have a backup.
- Sometimes all you need are pen and paper.

Find a sweet spot

- Somewhere you interviewer & interviewee feel comfortable
- Avoid landscape offices.
- Avoid noise & distractions: screaming kids, loud colleagues, loud ventilaton...

Avoid group interviews

More than one interviewee

- Harder to attribute quotes (especially over the phone)
- You might miss out valuable contributions.
 - Only one person can talk at a time
 - Introverted people are more inhibited to talk.
- If possible, schedule **two separate** interviews.
- PR people: They're helpful when they book up an interview and make sure that the people turn up. However, their silent presence on phone interviews can be oppressive and intimidating.

Avoid group interviews

More than one interviewer

- Don't let the client (seller) sit in on the interview.
- Avoid the interviewer's paradox
- If your client insists on sitting in, then respectfully ask him that you lead the call.

Avoid group interviews

The duo interview:

- One who asks questions
- Another who notes and asks second questions

Tips for managing an e-mail interview

- Email interview can save time
- When you are just looking for facts
- The last resort



Tips for preparing an e-mail interview

- Be thoughtful of the client's time: **limit the number of questions**
- Clearly **identify** yourself and your organization to your source. Let them know how you came to contact them.
- Let them know what your **deadline** is. Follow up if you have not heard from them.
- Once you have received a response, do **follow up** to ask for clarifications if you have the need.
- Send a **thank you** note with an offer to send a link to your finished article.