

INDIVIDUAL EXPERT INTERVIEW

/ In-depth learning from those with special knowledge or experience /

WHAT IS AN INDIVIDUAL EXPERT INTERVIEW?

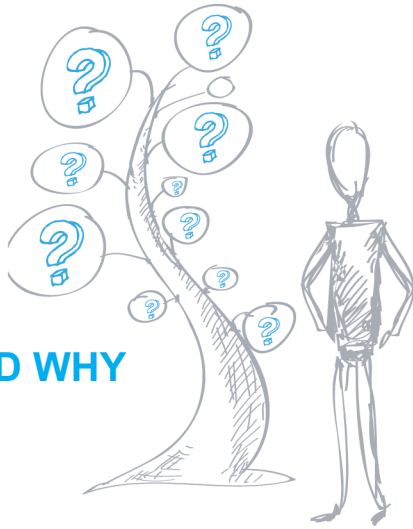
An Individual Expert Interview is a focused conversation for capturing knowledge from an 'expert', who may be any person with deep knowledge or relevant experience in a topic/issue of interest. Because there is no audience, the knowledge gathered during the interview is usually disseminated via an article, blog post, transcript, book chapter, or recording (partial or complete) of the interview. Sometimes expert interviews are held only to support effective decision-making and action, without any published product.

A good interviewer uses a combination of pre-set and spontaneous questions, adapting them to suit each interview to elicit the most usable knowledge.

The Expert Interview is non-confidential: information obtained from the interview can be shared widely. This tool is different from the Debrief tool described elsewhere in this Toolbox (used when confidentiality is critical to enable people to share their experiences without repercussions, and typically focused on one specific project or experience) and from the Expert Interview with an audience (which disseminates knowledge more quickly, but is usually more limited, both in duration, and in the degree to which complex or sensitive issues can be probed).

REQUIREMENTS:

- *Interviewer (with good interviewing skills)*
- *Interviewee - Expert/ Practitioner/ Staff/ other person with deep knowledge or interesting experience in a relevant*
- *Interview Guide, to be prepared by the interviewer, with key topics possibly shared with the interviewee before the interview*
- *Audio recording device/app (strongly recommended)*
- *Video recording device/app (optional)*
- *Interview room (or café conducive for audio recording conversations)*
- *Note-taker (optional)*
- *If interview will be conducted remotely: phone or suitable web conferencing app for both parties*
- *20 - 60 minutes (depending on expert's availability)*



WHEN AND WHY TO USE

Consider organizing an Individual Expert Interview when you have, or expect to get, access to a person with deep knowledge and extensive or unique experiences in a topic or issue relevant for the work of your team or your organization. An expert may be a well-known figure or academic, a colleague who has just returned from a visit or tour of duty elsewhere, someone who has just completed a major project on a relevant issue, or indeed anyone with unique or valuable knowledge or experiences that are important for your objectives. An opportunity for an interview may arise fortuitously during a visit by/to the expert, or it may be arranged.

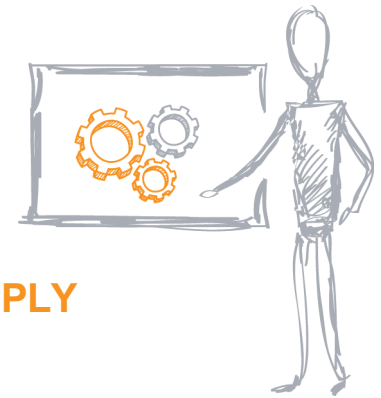
The conversational format can elicit knowledge from the interviewee which may not otherwise be shared, even if the interviewee writes an article on the topic or participates in other knowledge exchange processes. This is due both to the efforts of a skilled interviewer in asking probing questions, and to the fact that the interviewee will likely speak more freely during a one-on-one interview than in a large group setting (e.g. panel discussion).

The Interview format is useful for:

- ▶ Capturing tacit knowledge: knowledge from experience, including relevant anecdotes and stories, problems and challenges, insights and lessons learned, success stories, facts and analysis from the expert's point of view.

- ▶ Obtaining and incorporating an expert's perspective and recommendations when embarking on a new project or activity, to avoid re-inventing the wheel, to maximize the chances of success and the results, and to build credibility.¹

- ▶ Tapping into valuable knowledge in a simple, low-cost way. You might choose to organize a series of expert interviews around a specific topic to take advantage of a range of individual experiences and expertise.



HOW TO APPLY

Before the interview

1. Make an appointment.

- ▶ Ask the expert for an interview in writing, preferably at least a few days in advance. Describe briefly but clearly the purpose of the interview, how and why their input would be valuable, focusing on the issue/topic of interest and their credentials or experience.

- ▶ Agree the date, time (anywhere from 20 minutes to one hour) and location.

- ▶ Arrange a venue that is reasonably quiet, with comfortable seating and minimal distractions. Refreshments are optional, but it's a good idea to have drinking water available, especially for interviews longer than 30 minutes.

¹ Another tool suitable for use at the start of a project is the Virtual Peer Assist, described elsewhere in this Toolbox.

▲ Explain the interview process and expected outputs. Ensure they understand that the purpose of the interview is knowledge sharing – hence it is by necessity ‘on the record’ – and that they know who the audience is, and how the knowledge from the interview will be shared (article, newsletter, internal site, external site, etc.) or applied.

▲ If you plan to record the interview, request permission from the expert, and explain what use will be made of the recording.

2. Prepare for the interview.

▲ **Do some research** on the person being interviewed, their background and professional interests, work history, any publications, etc. Presumably you already know something about them (hence your request for an interview), but it helps to be familiar with basic details before you sit down to talk with them.

- The interview process may be more formal for dignitaries and VIPs, so do bear in mind the expected protocol.

▲ For interviews with individuals who speak a different language, employ the services of a translator who is fluent in both your language and the language of the interviewee. However, do bear in mind that the need for translation will reduce the potential knowledge gain from the conversation, and that you must work closely with the translator to ensure questions and responses are delivered accurately.

▲ How will the interview be used? Who is the target audience? These questions will

help define the interview tone, focus and the outputs required.

- For internal target audiences, the tone of the interview can be conversational and informal, and may address organization-specific questions and issues.
- For external target audiences, it may be more helpful to stick to the facts and issues ‘on the ground’.
- If there are different audience bases, you can conduct an in-depth interview and re-package the information by preparing several outputs, e.g. articles, with varying degrees of detail that can be shared appropriately.

▲ How will the interview be captured? It is often useful to supplement note-taking with an audio recording that you can go back to when consolidating and processing your notes.

▲ **Prepare an interview guide** – an outline to help you keep track of the interview. It should include the main topic, issues to be discussed, and questions for each issue. The approach outlined below is semi-structured: it combines the power of pre-planned questions with the flexibility of spontaneous follow-ups. Don’t overdo the detail or make it too structured; keep flexibility so that you have room to adapt and add specific follow-up questions on the spot as you conduct the interview. Key topics from the interview guide can be shared with the interviewee to help them gather their thoughts around the specific topics.

- **Based on the required outputs, think about how to frame the questions to elicit the most learning.** If possible, do a little research to help create good questions: Speak to practitioners in the same field and ask them what they think are important questions they would like answered. Consider asking new staff as well, to take advantage of their fresh perspective.
- **Make your first questions simple** to elicit basic background for the topic of the interview

and get the conversation flowing.

- **Next, proceed with questions to establish key factual details:** what, where, when, who, and so forth.
- **Consider asking how specific problems/challenges were identified,** how they were solved/addressed, why certain actions were taken or not taken, and what they would do differently given the opportunity.
- **Thereafter, incorporate sufficient open-ended questions** to allow for wider discussion and discovery. For example, “How has this project changed the lives of children in this village?” is an open-ended question inviting a detailed, rich response. It is preferable to “Has this project changed the lives of children...?”, which is simple and closed.
- **Include also a few questions on the interviewee’s opinions and interpretations.** These must be asked with sensitivity, and not too early; ask them once the facts are established and the discussion is flowing. You can’t pre-plan all such questions, so be prepared to add some such questions spontaneously (but with sensitivity).
- Refer to the Expert Interview Guide (Appendix 1) for a suggested format.

Conducting the interview:

3. Open with an introduction.

- When you meet, first take a couple of minutes for **informal conversation** to put everyone at ease.
- Next, **introduce** the format and structure for the interview.
- If you plan to record the session, remind the interviewee and **obtain consent** before beginning.
- Should the interviewee request a review of the interview draft before it is shared with others, agree (and follow through) to

allay their concerns.

- Confirm that you will respect the interviewee’s wishes for **confidentiality** should they request it at any point during the interview.
- Most importantly make the interviewee feel and know that you are **genuinely interested** in what they want to share which will make them reveal comfortably.
- Then **begin with your background questions**, to get the conversation flowing. These should be light and easy to answer.

4. Conduct the interview

- ▲ Once the background questions are complete, launch into the main body of the interview, per the interview guide which you prepared. Begin with questions on the facts, and on specific problems and challenges. Then proceed – with due sensitivity – to ask questions about the interviewee’s opinions and interpretations, and even feelings about the meaning of the facts and what can be learned from them.
- ▲ As appropriate during the interview, follow up preplanned questions with spontaneous ones, to obtain additional details on things of interest, stories and anecdotes, clarifications or insights. Knowing when and how to ask spontaneous questions is more of an art than a science, but be guided by your instincts and your sense of what your audience would be really interested in. For example, when opinions are shared, it can often be a good idea to clarify what the interviewee means rather than presume or assume what he/she refers to, and to gently ask why the expert believes this, to help elicit additional relevant evidence and experience.
- ▲ Do not be rigid about following the guide to the letter. Depending on the conversation flow, you may choose to swap the order of

questions; to ask for examples or stories, e.g. “Can you give me an example of...?”; or to probe (with sensitivity – this is not a job interview) regarding the Who, What, When, Why, and How of situations or actions described by the interviewee.

▲ Do not ask more than one question at a time.

▲ Always give the interviewee time for reflection if needed.

▲ Listen actively. Focus on what is being said and how the person says it. Pay attention to the tone of voice, facial expressions and body language too. This helps you understand the full context of responses.

▲ Let the interviewee take the lead sometimes. Allow them to follow their train of thought, which may reveal important facts or view that may not be covered in your questions. As the interviewer, you should be able to catch these moments and explore them further.

▲ At the the same time, do ensure that the conversation does not veer off topic.

▲ Maintain an even and welcoming demeanour, be open-minded and non-critical. People are less likely to be candid if they suspect their opinions are being judged.

Capturing the interview

▲ Either take notes during the interview, or record it with permission of the interviewee.

▲ If taking notes: in addition to capturing important points, pay attention to the facts and themes emerging from the interviewee’s remarks, and clarify

inconsistencies quickly. Use a notepad or write notes in your Interview Guide. Consider using a second note-taker if possible, especially for interviews with eminent persons.

▲ If recording the interview: use a device or app (audio or video) that you are familiar with and that is reliable and simple to operate. Mobile phones are readily accessible recording devices; ensure that your phone is muted or in airplane mode, has sufficient memory to store the recording and has adequate charge or is plugged in.

5. Close the interview.

▲ When you have 5-10 minutes left in your allotted time, ask the interviewee if they have any final thoughts or overarching messages on the topics you have discussed.

▲ Ask for feedback on the interview, how they felt, and what they thought of it.

▲ If needed, ask if they can suggest relevant knowledge resources – articles, books, websites, etc. – that can supplement and enrich your interview content, particularly as you develop your intended outputs or knowledge products.

▲ Once the interview is completed, thank the interviewee and let them know of the next steps:

- **Notes** to be reviewed and summarized.
- **Facts** to be checked against sources.
- **Sharing the interview draft** with the interviewee prior to publishing. While this is at the discretion of the interviewer, sharing the interview notes will help establish trust. If you committed to do so at the beginning of the interview, then you must follow through.
- Format for **dissemination** of interview or its

content/knowledge.

- Any **decisions or actions expected** which will make use of the interview or its content/knowledge.
- **Timeline**, if known.

After the Interview:

6. Review your notes as soon as possible while the interview is still fresh in your memory. If you recorded the interview or had a second note taker, do cross-checks to make sure you have a complete record of the important information. If there is still any confusion, call or email the interviewee for clarification.

7. Once the notes are in order, prepare the desired knowledge product: article, blog post, book chapter, briefing note, etc. This draft can then be shared with the interviewee if this was agreed. They may have some suggestions and comments that can be incorporated.”

8. Publish/ disseminate the interview, or its relevant portions, among your target audience according to your plan. Or proceed with the decision/action which the interview was intended to support, if this was the objective.

TIPS FOR SUCCESS

Preparation:

▲ If the interviewee asks to see the questions before the interview, use your discretion:



- For **very important people and dignitaries**, seeing the questions may be a pre-requisite before they agree to be interviewed.
- For **most interviews**, it may be worthwhile sharing a broad overview of objectives and high level questions from your Interview Guide, so that the interviewee has time to reflect. But usually it is best not to share detailed questions, and similarly to let the interviewee know that they don't need to prepare detailed responses in advance. This approach allows both for preparation and for spontaneity and a genuinely conversational approach to the interview.

Interviewer Qualities:

Good interviewers are:

- ▲ **Friendly, open-minded and non-judgemental.** Although interviewers may also be specialists, they can put their thinking and perspectives aside while interviewing.
- ▲ **Intuitive** and able to think on their feet.
- ▲ **Structured but also comfortable with natural flows of conversation**, and able to gently bring conversations back to the topic when needed to ensure that all key topics of the interview are covered.
- ▲ **Flexible** when dealing with different personality types and social styles, able to gauge

differences and tailor the interview to suit the interviewee's personality.

- ▲ **Curious.** Interviews are a human exchange requiring some enthusiasm. Curiosity and enthusiasm will be more likely to elicit more and better responses, because people like to share what they know with someone who is genuinely interested.

- ▲ **Skilled listeners.** Once you have asked a question, give the interviewee time to respond. Allow them to articulate their thoughts and ideas completely. Recap or paraphrase responses to make sure you have captured their meaning clearly. This also helps the interviewee keep track of the conversation.

- ▲ **Able to understand non-verbal communication.** Facial expressions and body language speak volumes. The way someone speaks and the tone of voice convey the excitement they may feel about a topic or issue. Conversational energy can guide you in choosing whether to pursue the topic at hand, or begin a new line of questioning.

Question Design:

- ▲ Ask **clear, direct questions** that are unambiguous and jargon-free. Make them interesting, provocative but non-threatening. Test them out on colleagues or a sample audience.

- ▲ Encourage the interviewee to be **specific**. Ask for step-by-step descriptions, examples and stories.

- ▲ **Avoid 'leading' questions** that force a person to answer in a biased manner. Here's an example of a leading question: "Do you not think that the response of the organization to the situation was valid?" Instead, ask "What do you think about the response of the

organization to the situation?"

- ▲ Include sufficient **open questions** to allow for rich responses.

Conducting the Interview:

- ▲ Wherever possible, **prefer face-to-face** over remote/phone interviews. Face-to-face conversations are usually more genuine and spontaneous. They will enable you, the interviewer, to gauge more easily the interviewee's emotions behind their responses, and thus to be more effective in posing spontaneous questions and choosing what responses to follow up.

- ▲ Pay attention to where the interviewee places **emphasis**. These are areas for potential follow up.

- ▲ **Manage time carefully.** Allocate sufficient time for people to answer all the important questions.

- ▲ Before asking sensitive questions, make sure that you have **established rapport** with the interviewee. Probe gently; use your intuition to gauge their comfort level with an issue. Abandon the question track if you find that the interviewee becomes defensive or closes down.

- ▲ Keep an **eye out for discrepancies** and unintentionally misleading responses. Ask for clarification, repeating your question if necessary.

Tips for online/remote interviews:

Interviews conducted over the phone or via Skype or another web conferencing application can make it more difficult to create rapport with the interviewee. You will likely have less time available for an online interview than for an in-person interview of the same duration, due to the need to connect to the platform, adjust volumes, etc. Also, be mindful that a poor audio and video connection

will ruin a fantastic interview, and you may not have a second opportunity to interview the same person.

Nevertheless, sometimes an online/remote interview may be the only way to speak to an expert.

If you need to conduct an online/remote interview, the following tips will be helpful.

- ▲ Choose a **reliable technology**. Phone can still sometimes be a good option.
- ▲ If you choose to conduct the interview over the internet, ensure that your **internet connection is reliable**. Be cautious about using Wi-Fi; hardwired internet connections are preferred. Ensure that your microphone and camera are working correctly, and that you know the software platform (e.g. Skype, Skype for Business) you will use. If needed, test beforehand with a friend.
- ▲ Decide whether you want to **record** the interview ahead of time. If so, be sure to get the interviewee's agreement in advance (not at the start of the interview).
- ▲ **Video** can enhance rapport between yourself and the interviewee, especially if you don't know each other already, or are only slightly acquainted. Prefer a video interview, but only if the internet connection is robust for both parties. If either or both of you are working in low-bandwidth conditions, choose an audio interview to avoid software delays and dropouts.
- ▲ Propose a time (be mindful of different time zones and daylight/standard time differences) and format (video or audio), and **get email confirmation** from the interviewee.
- ▲ Conduct the interview from a location with **minimum noise and distractions**. Unless you're conducting a panel interview, use a

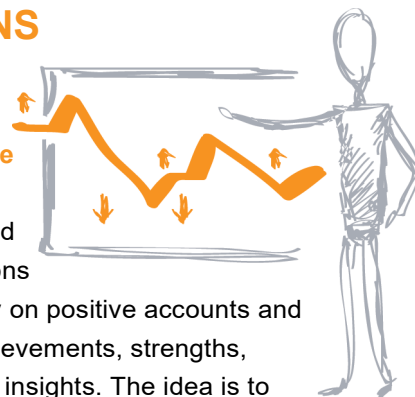
headset to maintain the privacy of the conversation (you don't want others overhearing and interjecting suggestions or comments). Don't check your cell phone or email during any interview!

- ▲ Show up at least **5 minutes before the scheduled start** (10 minutes for VIPs). Have your questions ready.
- ▲ Have an **alternate contact method** available if needed, e.g. the email address or phone number of the interviewee.
- ▲ Non-verbal cues are harder to catch in an online video interview, and even more so in an audio-only interview. Pay close attention to the interviewee's **tone of voice** (and to their gestures and demeanour if using video), to help you understand more fully what they are thinking and feeling, and to know when and how to use spontaneous or probing questions appropriately.

VARIATIONS

▲ **Appreciative Inquiry:** This is a systematic method for asking questions

that focus entirely on positive accounts and experiences, achievements, strengths, opportunities and insights. The idea is to understand what worked well and why, so that it can be amplified.



With this approach, focus your interview questions on:

- What worked well in a given project or situation.
- Stories that highlight strengths or describe real breakthroughs and significant achievements.

- Exploring the elements present during occasions of success.
- Innovation and future-oriented thinking.

For more details refer to Center for Appreciative Inquiry, “Generic Processes of Appreciative Inquiry”, under References below.



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Appendix 1: Expert Interview Guide

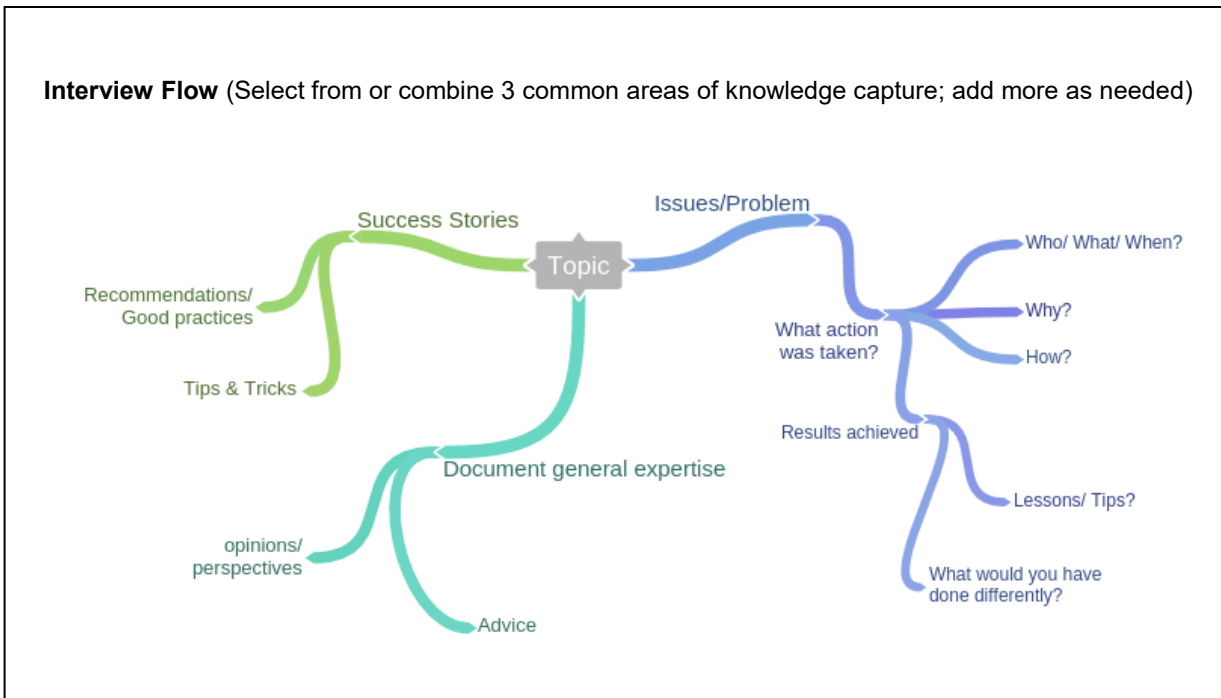
Date:

Interviewer:

Introduction
 Interviewee: <Name of expert/ staff>
 Title: <Role>
 Background: < Expertise; Context; Relevance; Reason for Interview>

Expected Outputs:

- 1.
- 2.
- 3.



Question Type	Examples
Introduction/ Background Information	What is your role in the organization? How long have you been working in this area of work? How did you get into this field of study?

	What do you find most fascinating about this area of work?
Factual	<p>Who was involved?</p> <p>What were the key factors...?</p> <p>What steps did you take...?</p> <p>What were the results?</p>
Opinions/ Perspectives	<p>What surprised you?</p> <p>How did it affect you?</p> <p>What did you learn from the experience?</p> <p>What do you think was the real reason it worked?</p> <p>What challenges or risks should we anticipate in...?</p> <p>What insights can you share about the experience?</p> <p>What would you have done differently?</p> <p>Why? (as a follow-up to questions above)</p> <p>What advice would you have for.....?</p>
Wrap Up	<p>What are the 3 most important things to remember?</p> <p>Do you have any important points to share that we did not talk about?</p>