



# Meeting executives face-to-face

In today's fast-paced research world, where the designers and users of research scramble to move toward a more tech-savvy design solution, there is still a firm place for the traditional, face-to-face executive interview. Corporate managers may be accessible in a variety of other modes but nothing provides the richness of an individual (the professional interviewer) sitting with another individual (the corporate interviewee) in his/her environment for the sole purpose of intensely exploring topic-specific attitudes and behavior.

Looking to improve upon their own executive interviews, clients have asked for the secrets or parameters that contribute to a successful executive interview study. If success is measured by the depth of input and insight as well as efficiency (i.e., in terms of getting to a completed interview), then there are at least six necessary components to the face-to-face executive interviewing design model.

## 1. Positive preliminary contact and scheduling

A successful executive interview begins with establishing a positive relationship with the interviewee prior to the interview. In addition to scheduling the interview appointment, preliminary contact lays the foundation for the positive rapport necessary when the actual research interview is conducted.

The preliminary contact should play to the interviewee's ego and be respectful of his/her professional status. For this reason, cold-calling is never appropriate and the preferred form of contact is a brief letter (on the client company letterhead) sent to each potential interviewee. This letter should outline: the purpose of the interview; the benefit to be derived from participating in the interview (e.g., how interview responses will be used to improve their business operations); the promise of confidentiality; and, the researcher who will be calling to set an appointment for the interview. This letter

*Editor's note: Margaret R. Roller is president of Roller Marketing Research, Gloucester, Va. She can be reached at 804-693-3208 or at [mmr@rollerresearch.com](mailto:mmr@rollerresearch.com).*

should clearly state who will be calling (this should be the research interviewer) and when the interviewee should expect the call.

Careful scheduling of interview appointments is also important. During the interview, the interviewee should feel that the interviewer is relaxed and has plenty of time to discuss the issues rather than feeling forced to move quickly through the interview to get to the next appointment. This is why executive interviews are typically scheduled no less than two hours apart, providing an hour for the interview and an hour for the interviewer to make notes and travel to the next appointment.

## 2. Clearly-defined and achievable goals

It goes without saying that each

interview should be targeted at clear, succinct goals that are deemed achievable within the confines of the interview. These goals should be highly specific – e.g., reactions to a particular product/service idea or line extension based on current usage/need (such as a new insurance product from an established bank) – rather than general in nature – e.g., attitudes towards broad concepts (such as an all-in-one financial service).

### *3. Flexibility - personalizing the interview*

Each interviewee is different from the others. And, indeed, most interviewees will tell you that their business is unique or they are otherwise in a unique situation as it relates to the topic. While some are less unique than others, there are always nuances that prevail. For this reason, a critical interviewing skill is the ability to adapt to the situation and modify the interview as necessary. This may mean rewording questions as well as adding or deleting sections of the interview.

### *4. Distinguishing between useful and not useful input*

Equally important to being flexible is the ability to identify useful input based on the pre-established goals of the interview. There are many instances when the interviewee may unintentionally confuse the interviewer and steer the discussion away from its goal. For instance, the interviewee may get sidetracked in his/her comments, may misinterpret the interviewer's

question (and, instead, answer an irrelevant question), or may simply relate to the topic from a unique point of view which carries the interviewee's train of thought in other directions. It is the interviewer's job to re-focus the interview as necessary. It is not uncommon, however, for portions of an interview to be omitted from subsequent analysis due to lack of relevance.

### *5. Listening skills – exploring what is said and not said*

Listening skills involve more than just keeping quiet and letting the interviewee talk. While this is important, it is equally important to really listen to what is being said and ask yourself, "Do I have a clear understanding of what this person is saying? Can I repeat, in my own words, the point this person is trying to make?" It is interesting how often interviewers think they understand the interviewee but, in truth, are unable to fully explain the interviewee's comments. To this end, interviewers should not shy away from diligent probing but be comfortable in the fact that most people are flattered that the interviewer is taking the time to appreciate his/her point of view.

Take, for example, the word "quality." The interviewee may say that he/she looks for a bank that provides quality service. What does that mean? How does the interviewee define quality? It is surprising how many different definitions of quality exist. This is a simple example but it pertains to a wide variety of words or issues that sur-

face in qualitative interviews.

Listening skills also involve the ability to appreciate what is not being said. It is important for the interviewer to pay attention to the verbal and behavioral cues provided by the interviewee. For instance, the interviewee may initially express praise and satisfaction toward the client company but the interviewer may not observe the usual signs of conviction and feel that the interviewee is holding something back. Being sensitive to this, and after careful questioning, the interviewer can encourage the interviewee to share important information that could have otherwise gone undetected.

### *6. Limited researcher involvement*

The successful utilization of the first five parameters hinges greatly on limited researcher involvement. Ideally, just one senior researcher will execute the initial contact, the scheduling and the goal-setting as well as the interviews and analyses. While a study including 30 or more face-to-face executive interviews may be a challenge for a single researcher, it is the necessary glue that ensures the overall integrity of the design.

### **Elegant design**

Face-to-face executive interviewing may not be fashionable and may not be fast but it is an elegant research design that effectively minimizes error while maximizing ultimate insight. That is why this traditional study design will always play a prominent role in qualitative research. | Q