

Getting in touch with the company & interview techniques



RSM CDC case writing training material Part 4

Getting in touch with the company

- Share your case plan with the company
- Specify the type / amount of information you require
- Make clear the boundaries of your research activity
- Present an example of a similar case
- Ask if a non-disclosure agreement (NDA) needs to be signed
- Identify the people in the company you need to interview
- Make clear how much time / commitment involved
- Explain publication process / distribution of the case
- Invite to case teaching session? Other input?
- Give assurance that the case not released until authorized
- Check who needs to authorize
- Confirm willingness to edit in response to company feedback
- Make clear the timescales involved
- Make sure whether the company, interviewees, and industry need to be disguised
- Ask to the company to agree on a provisional case release

Interview Techniques

i) Before you start

- Do homework thoroughly
- Develop an interview guide (a general outline, e.g. simple chronological flow, or key questions)
- Take control of the location (most likely, your interview will be at the company premises)
- Dress appropriately, or at least dress with a purpose
- Be on time
- Ask permission in advance for recording

ii) Interviewing Principles – Information-gathering, Personal Profiles, News

- There's no such thing as a stupid question.... provided you've done your homework
- Making the interviewee feel comfortable – connection is key
- Active listening and summarising are powerful interviewing tools
- Interviewing is not about you! Minimise your own vocals, allow for pauses
- The interview gems often emerge as you're walking to the door; the interview only ends when you're out the door (Please refer to *RSM CDC case writing training material Part 2: How to Write a Good Teaching Case.*)

Tao Yue and Jacqueline Nolan from the RSM Case Development Centre prepared this document as the basis for training and teaching.

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iii) Managing the interview

- Open by introducing yourself, stating role and purpose of the case
- Realign with interviewee on time allocated for interview
- Request permission for recording, explain it's for your ears only
- Formulate your questions clearly
- Ask open-ended questions (who, what, why, when, where, how, describe, can you explain...) when you want to explore the subject
- Ask closed-ended questions (yes/no answers) when you want to clarify a fact
- Be an active listener: maintain eye contact, watch body language, hear tone being used
- Summarise information to maintain focus and acknowledge interviewee's input
- Don't ask a laundry list of questions: be ready to improvise!
- Keep opinions and/or leading questions to a minimum: use when you have relationship with interviewee to trigger 'passionate' insights
- Show empathy but stay neutral
- Watch the time and check you've asked crucial questions before closing

iv) Common pitfalls

- Not acknowledging that you don't understand a particular point
- Not taking enough time to connect with interviewee
- Sticking too much to your own agenda / list of questions
- Asking a series of questions in a row
- Asking double-barrelled questions, where one question deals with more than more issue, e.g. "How satisfied are you with your pay and job conditions?"
- Forgetting to watch the time

v) Completing the interview

- Be patient: don't count on too much useful information during the first interview
- End interview by stating the next step
- Set up a second interview to follow up interesting aspects covered in first interview
- Listen out for gems as you walk to the door
- Transcribe the recording and/or write down notes ASAP