WRITING CASE STUDIES:
How to Make a Great Living by Helping Clients Tell Their Stories

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MODULE 4

The Interview Process

Transcript

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Module 4

The Interview Process

Introduction

Welcome to **Module 4**. In this module, we're going to talk about the interview process, which is a critical step in a case study project. Because it is so important, we're dedicating a whole module to it.

But before we do that, let's talk about what's happened up until this point.

- You've had an initial discovery call with your client to identify the objective of the case study, the target audience, the length and style considerations, and hopefully a strong hook.
- You've gotten buy-in from the sales rep in charge of that account or at least from the sales manager or whoever owns that account.
- Your client has gotten a personal commitment from someone in the customer's company to do a story.
- Your client has also gotten preapproval from the customer's legal and/or PR departments, or from that company's leadership to do a case study on the results they've gotten from buying and implementing a product or service.

- You've also scheduled the interview with the right person at the customer's company.
- And in the meantime, while you waited for that interview time and day to come, you've had a quick call with your project owner and, if applicable, with someone who's very familiar with the customer's story.
- You've then used that information to customize your questionnaire, and have sent that questionnaire to the customer ahead of the time of the interview.

The Interview Process

Now the interview time has arrived and the question is, what do you do? Most case study interviews are done on the phone and your estimate to the client probably reflected phone interview only. Live is going to be more. It's going to take more time, so make sure that this is clear.

Onsite Interviews

However, if the client insists on having the interview conducted onsite, that's fine too. Just make sure that this is reflected in your quote, and make sure that this is practical to do. You're obviously not going to hop on a plane every time you need to conduct a customer interview.

Now there are times when it makes a lot of sense to interview customers onsite. For example, maybe one of your clients has an annual customer conference, or they're having a customer visit them at their headquarters, or they're meeting some of their customers at a local convention or conference. When you hear of these events happening, ask your client if you can take advantage of those situations.

A few years ago, one of my clients hired me to come in for two days to their customer conference to interview six or eight different customers while they were there at the conference and write case studies from that over the next two months. It was a great deal for both of us. I was able to charge for my time there and I was able to get my full fee for each of those six or eight case studies I wrote for them. So it was a great opportunity to generate a lot of business very quickly.

Also, even though onsite interviews follow the same format as phone interviews, I found that you often have to work harder to keep onsite interviews on track, so I prefer phone interviews whenever possible.

Record Your Interviews

I also strongly recommend that you record your interviews. Recording the interview has two big benefits. First, it helps you take better notes because you don't have the pressure of capturing everything you hear, which means you can better concentrate on what the customer is saying, which helps you ask smarter follow-up questions.

Second, a recorded interview becomes raw content. By having someone transcribe that audio for you, which, by the way, will only run you about $40 or so for a 30-minute recording, you end up with a word-for-word account of the customer's story, which in many cases can be easily turned into a very rough draft of your case study.

In terms of recording equipment, you don't need anything fancy. You have two options, each of which is very affordable and practical. One is to use a conference call service that has a recording feature. All you have to do is set up an account with one of these companies. I use FreeConferenceCall.com, by the way. They'll issue you a number and two PINs, one for you as a moderator and one for callers to use. Many of these services are free, and some even include the call recording feature as part of their free package.

Another option is to buy a digital recorder and record the call yourself in your office. The problem with this option is that there's no easy way to capture the voices of the other callers. So the recorder will pick up your voice easily, but it won't pick up the other callers' unless you have them on speaker phone, which I don't recommend you do.

I've gotten around this little challenge by using a little electronic device from Radio Shack that splits the signal and directs both of them into the recorder. However, I bought this device a few years ago and when I looked for it again on their website recently, I wasn't able to find it, so my recommendation would be to just stick to a conference call service unless you do an onsite interview, in which case, of course, you're going to want to have a simple digital recorder handy.

You can get a very decent recorder these days for $30 or $40, and many smartphones even include a built-in digital recorder application, so that's usually an option for you as well.

Besides being a great safety net for things you can't capture during the interview, a recording is absolutely essential when doing case study interviews that involve complex products or multifaceted stories. I write a lot of case studies involving very technical or very complex business situations that require more than just some simple notes and memory. It really helps to have that recording so I can go back and better grasp all the story details and intricacies.

Give Customer Quick Summary of Call

You have your recording all set and you call the customer at the agreed upon time to start the interview. At this point, you basically follow the protocol and roles you and your client had agreed upon during the planning phase. Obviously, if you're the only one on the call with the customer, you'll handle everything. But if your client is also on the call, they can lead the way and turn it over to you when the questions start or whenever you agree to do the hand-off.

Whichever way you do this, after introducing yourself and thanking the customer for taking the time to speak with you, it's important that you give him a quick summary of how you'll handle the call and what's involved. Basically, this is what I would tell the customer. First, explain what you're about to do and recap what the call is all about. Explain that you're writing a "before and after" story regarding the challenges they were facing and how ABC Company's product helped them solve those challenges.

Explain that this is going to be about a 30-minute phone conversation and the document you'll draft will end up being about a two-page document, and it will allow ABC Company to show prospective customers how other customers have used their product successfully.

Now for the really important statement, and this is something I would say almost word for word, and I say it every time I interview a customer:

“I want to assure you, Susan, that nothing will be published without your consent and your approval. Once we’re done here, I’m going to take this information and other information ABC Company gave me, and I’m going to write a rough draft. Jim over at ABC Company will then review that draft and send it over to you for review.

“You’re free to make any edits or modifications you’d like at that point, and send it back to me or to Jim. We’ll then make those changes and get it back to you for approval.

“The point is, Susan, that we will, again, never publish this piece until you feel 100% comfortable with it. Does that make sense?”

It’s critical that you make the customer feel comfortable. This information was in the FAQ document you or your client sent this individual previously, but they’ve probably forgotten about it. Plus, all these points are important enough that you should be emphasizing them. Doing so will increase the chances that the customer will really open up to you because she feels safe that you will be careful with that information.

One final thing, before you start the interview, make sure to ask the customer if it’s okay to record the conversation. Explain why, though. I usually say something like, “This will allow me, Susan, to take better notes and to have something I can go back to if I missed any key points. I can assure you that this recording will stay in-house and will not be distributed. Is it okay if I go ahead and record this?”

By the way, if your client is on the line with you, have them ask this question. In other words, ask them to ask permission to record the conversation. I’ve never had someone say no to this request.

Ask Questions from Questionnaire

Once you get that out of the way, jump right into your questions from the questionnaire. Hopefully, they received the questionnaire earlier when you forwarded it to them or when your client forwarded it to them. If they didn't, it's no problem. Just explain that you're going to start by focusing first on the "before" picture, and then will move into the "after" part of the story.

A good approach that I like to use is to make your first couple of questions somewhat broad and non-threatening. That's why I like to start my interviews by asking the customer for a general overview of their company and the markets they work in. I preface this by telling them that I've already read about their company and researched their organization, but I'd like to get their take on how we want to position them in the story. This not only gets them talking and warmed up, but it also might even give you some insights as to how they prefer to be portrayed as a company.

From there, move on to the more specific questions in your questionnaire. By the way, stick with the general order of that questionnaire that I've included here in this program. I know you're going to customize the questions, but the questions should still follow that format in that particular order, that sequence. There's a reason for this. You want the recording and the transcript you'll end up with to be in order of how you're going to write the draft. If your questions jump around too much, it's going to be harder for you to get the most out of that transcript.

This leads me to another important point. In many, and I would say even in most cases, you'll have to work hard to keep the customer focused on the question at hand. With a "before and after" story such as a case study, interviewees, I've found, have a tendency to want to jump around. So when you're asking about a particular challenge they were having, it's natural for them to talk about the challenge and then to jump right into how the product or service has helped them with that challenge. That's okay. That's natural. Just make sure if the conversation starts veering off too much that you bring the customer back to the question at hand.

Something I do to prevent a lot of this is I let them know at the beginning of the call that it will be easier if we keep the discussion in the order of the questions, that we'll try to stay focused on the "before" picture first and then focus on the "after," the results achieved.

Ask Follow-up Questions

As you get into the interview, it's important to ask follow-up questions that help you extract benefit-related information from your customer because although features and functions are nice, as a writer, you need to explain how those features and functions helped the customer. Think of your questionnaire as a guide, not the law. When you get an interesting answer from the customer or one that really begs for more detail, don't be shy to ask for more information or for clarification via a follow-up question.

If you're not sure of when to ask follow-up questions, here's a rule of thumb I use. Keep asking yourself, "So what?" The "so what?" question is a great internal gauge and it's a good self-reminder that you need to continually look for the benefit that the customer received. Or when asking about the challenges the company was facing, "so what?" questions will also help you better identify the impact of those challenges.

Let's say that the customer is an appliance repair company and they were having problems getting the right parts shipped to the right locations so the technician could make the needed repairs on time. That sounds like an interesting challenge, but so what?

Well, your next question could be, "How was that impacting the customer, Susan?" She might reply, "The technicians would have to reschedule their appointments until the right part arrived."

"Okay, so what was the impact of that?"

"Well, the technicians would waste a lot of time driving around to the customer homes, only to find that in about 30% of cases, the part had not yet arrived or it had gotten there, but it was the wrong part."

"So what was the impact of that?"

"We had lost customers, high service costs, inability to schedule more appointments, etc."

From there, you can then ask for numbers on what exactly the company figured this was costing them in terms of repeat business, lost sales, lost time, and so forth. Notice how much richer the information might be just from asking a few follow-up questions and keeping that "so what?" question in mind.

Again, I hope you realize through these examples, you're not asking the customer, "So what?" literally. That's simply an internal reminder to ask follow-up questions to get to the bottom of either the challenge and the impact it was having, or the results and the benefits the customer achieved.

Let's talk about the results area, and how you can use this "so what?" approach to get better and richer information. Let's say the customer tells you that the new piece of equipment they bought from your client has made a process much simpler. Don't let them stop there. Ask yourself, "So what?" In this example, that could mean asking the customer, "That's great, Susan. Tell me more about that. How has it made it simpler?"

She may respond by saying that it saves them time. And at that point, you could ask, "Okay, do you know how many hours per week or per operator it has saved you?" But don't stop there. You could then ask, "What does that mean for your company, being able to save almost two hours a day per operator? Does that mean you can run fewer shifts or cut down on overtime?"

The best case studies are great because they have an interesting hook and tell a compelling story that is rich with detail without being boring or overly long. And your follow-up questions are typically how you'll get that sort of rich and juicy information. So practice asking those follow-up questions. And by recording your calls, I've found you'll be able to pay enough attention to the customer and what she's saying that you'll know when and how to ask those questions.

By the way, this is why it pays to prepare for your interview by reviewing your notes from both your initial discovery call and from your back-story call with the project owner and the other people in your client's company. The information you gather from these calls will help you ask better and more pointed follow-up questions during your customer interview.

Also, this is usually not an issue, but make sure to encourage your client to ask follow-up questions if he or she is on the call but is being very quiet. They shouldn't be shy here. After all, they're probably very familiar with the account and the customer story details.

Also, don't be afraid to ask for clarification on anything you don't understand or aren't completely clear on. It's better to ask now while you have the customer on the line than to have to burden them later with emails or additional calls.

Limit the Number of People on the Call

When it comes to the number of people to have on the call, I strongly recommend that you limit this to two people on the customer's side and one person on your client's side. Any more than that and you risk a lot of interruptions and confusion. All the parties try to introduce more detail and facets to the story that in many cases aren't really necessary and are only going to confuse you.

Here's the deal. If you and your client identify the right person on the customer side, someone who's very familiar with the "before and after" story, you're going to get 90% or more of what you need from that person alone. Many times, you'll even get everything you need from her, and whatever you don't get, you can usually arrange to have her or your client send you later on.

Some writers are really big into conducting three or four interviews with different people to get the full story. But I think that's a mistake. Most of the information you get from others will be a repetition of what you already got from the first interviewee. Or you'll get a level of detail that will not add to the story and won't even fit. So try to resist the temptation to interview multiple people, and when you have to, limit the questions to only those gaps your first interview left out because she didn't have the information you needed. Better yet, see if the original interviewee can forward you that information after the call.

Keep the Interview on Track

A couple of more quick points on interviews. I mentioned this earlier, but it bears repeating. As the interviewer, work hard to keep the interview on track. Stick to the questionnaire and ask the questions in the exact order of your questionnaire. The only exceptions, again which we just talked about a minute ago, are going to be follow-up questions, which you're going to have to improvise depending on the information you're getting from the interviewee.

Besides the obvious, there are a couple of really good reasons to keep the interview on track. The first is you've committed to keeping that call to 30 to 45 minutes tops and you want to make good on that promise. Second, after 30 minutes or so, the information you start getting from the interviewee tends to be more detailed than you're going to need for your story, which means more notes to go through and more text to sort through when you do get your transcript back.

Think about it this way. A typical 1,200-word case study, if spoken word for word, would take about eight minutes or so for the average person to say or to narrate. Granted, the customer is answering your questions and not necessarily giving you the actual narrative word for word, but still it shouldn't take more than 30 to 45 minutes to get the information you need to write your story. And keep in mind you also have all that background information from your discovery phase of this process.

Will your calls go long? Sure, sometimes they will. Many times that's just out of your control, especially if the customer loves what he or she does or if your client is leading the interview and is just having kind of a hard time keeping it on track. But try to keep the call under control as best as you can.

A quick note-taking tip, by the way, when you're recording your interview – if you get a really interesting or detailed comment from the customer, rather than trying to take it all down word for word, jot down the time on the recorder when she said it. That way, you'll be able to find it easier in the audio later and copy it from there.

Or even better, if you jot down a couple of key words from what she said, once you have your transcript, you can do a quick search in the document for those key words and your word processing program will take you straight to that comment. The command to do a search within a document in Windows is CTRL+F as in "find," or in Mac is COMMAND+F or the APPLE key+F.

Finally, once the interview ends, make sure to thank the customer for his or her time. Go ahead and ask if you can call her or email her with any follow-up questions or clarification points later should they come up. Reassure her that it doesn't usually happen, but if it does, you want to make sure it's okay to contact her briefly. I've never had anyone say no to that request.

When the Client Conducts the Interview Without You

I wanted to leave you with a couple of alternate scenarios that you should be prepared for when it comes to customer interviews.

SCENARIO 1: Client Conducts Interview with Questionnaire

The first one is a scenario where the client conducts the interview without you, but they've at least used the questionnaire that you customized and gave them for that purpose. This can happen. Maybe your client is visiting the customer and wants to take advantage of that visit to interview them. Or maybe they're sitting down for a coffee at an out-of-town conference with the customer.

Either way, ask your client if there's any way they can still conference you in during that interview. That's always best. But if that's not possible, that's fine. Just try to go through the discovery and planning phase together, the steps we discussed in the previous module, and create a customized questionnaire for your client to use during that interview.

Then try to prep him or her on some of the interview tips we've just discussed here. And try to insist that they record the interview for you. It's going to be very, very difficult to write up the case study without a recording of that interview, especially since you weren't even there.

SCENARIO 2: Client Conducts Interview Without Questionnaire

The other scenario you might come across every once in a while is when the client conducts the interview without you, just like the one I just spoke about, but this time they do it without using your questionnaire. Here again, this can happen if your client is out visiting the customer or just happens to run into an opportunity to get their story. Or maybe one of the sales reps really wants to do a case study one of their customers and she interviews them on her own without your questions and without consulting you or someone in marketing. It's fine.

But your client needs to understand that you don't have much to work with when that happens. Notes alone aren't usually going to be enough to do a good write-up, but sometimes the client is so familiar with the story that you can actually interview him just as if he was the actual customer. You would still run through the discovery and planning phase, but then, of course, you're going to move right into the questions from there.

Bottom line is this second scenario can happen. My philosophy is don't turn it down. Just try to find viable ways to work around it, and make sure to set the right expectations with a client on what you can and cannot do based on how much information they have from their customer to write up the story.

Introduction to Module 5

That's the interview process. In the next module, we're finally going to get to the moment of truth – writing your case study. *So brace yourself and I will see you there!*