Interviewing Skills for Technical Writers

Excellent communication skills is often listed as a prerequisite for a position as a technical writer. Although good communication skills is widely recognized as an important component of the technical writer's repertoire, very few training courses seem to address one of the central components of communication that technical writer's use on a daily basis - how to interview subject matter experts (SMEs), to gather information on a project or subject.

This article attempts to address this topic, providing some tips and suggestions for conducting interviews.

Tips and Suggestions for Interviewing

The following tips will help you plan for and implement an interview:

- Prepare for interviews beforehand

- Provide a clear, written agenda for the meeting

- Schedule short meetings, rather than lengthy ones

- Conduct the interview at a quite place, free from interruptions

- Meetings should be informally structured, with a clear introduction, main discussion and conclusion

- Provide ample prompts and encouragement

- Learn to listen carefully

- Rephrase and "play Back" information in your own words (a technique called reflection, which is often used by psychologists)

- Take ample notes

- Provide a summary of the meeting's conclusions

Prepare for interviews beforehand

Always walk into a meeting prepared. Respect your interviewee by doing your homework beforehand. This includes reading up on existing material related to the project: the system requirements specifications (SRS) or marketing documentation, other internal documents or memos relating to the project. If you are interviewing a new client, then check out their web site and look at previous manuals, to gather information and a background on the product.

Provide a clear, written agenda for the meeting

Every interview should have a specific purpose and a clear agenda. Keep your meetings focused, by concentrating on a single topic or objective, rather than attempting to cover everything. Write down the items you wish to cover in the meeting and send this as a memo to the participants, before the meeting.

Schedule short meetings, rather than lengthy ones

Related to the above suggestion, it is best to keep interviews brief and focused. For example, break an hour session into two half-hour sessions. This enables you and your interviewee to keep your attention focused on the task at hand. It also enables you to schedule meetings into even tight schedules. While many might feel hesitant about fitting an hour or two-hour meeting into a busy day, most will find the time for half an hour. Knowing that meetings are short will also provide more incentive for participants to arrive on time.

At the same time, it is preferable to have one-on-one meetings, which enable for intense and involved discussions, rather than large meetings attended by several different parties, each with their own agendas.

Conduct the interview at a quite place, free from interruptions

When interruptions are part of a meeting, this can break the concentration of the participants and result in a lengthy, dragged out meeting, tiring for everyone involved. So have your meetings away from your office and telephone, preferably in a meeting room, where the door can be closed. In some cultures, there does seem to exist a culture of "interruptions" during meetings. In this case, remind the participant in a friendly manner that your time is limited and ask if you can continue.

Meetings should be informally structured, with a clear introduction, main discussion and conclusion

The introduction stage, during the first 5 minutes is a warm-up stage, where you greet your interviewees and make them feel comfortable and relaxed. During this stage, talk can be informal and unrelated to work topics - such as health, family or weather. If you have a kitchen in the office, offer your guest a drink.

The main discussion covers the topics that you have outlined in the agenda. It is a good idea to have this agenda printed out and then follow through each item. Tick off the item once it has been covered. Questions at this stage should be targeted and specific.

The conclusion summarizes the action items of the meeting and gives you the opportunity to go through your list to make sure that all items have been covered. This is also the stage in which to schedule the next meeting.

Provide ample prompts and encouragement

This is especially important for reticent engineers, people whose first language is not English, and for others who have difficulties communicating their ideas.

Encouragement could be through a smile, or a nod, to prompt the speaker to continue. Even if you don't fully understand what has been said to you or the speaker is not clear or coherent, don't panic or become frustrated. Give them the opportunity to speak.

Start with easier, more closed-ended questions (see next section) that can warm up your speaker and get them to start talking. Sometimes, asking questions to which you already have some understanding of the answer can be a way of illustrating to your interviewee your understanding of the topic and help to build the basis of trust in your capabilities.

Learn to listen carefully

Listen carefully to not only the content of the discussion, but to the speaker's tone of voice, emphasis and body posture, which can provide important clues not only to the information, but as to how the person views it, or the interview process. Don't interrupt unless you feel the need to prompt or to ask follow-up questions. Avoid making assumptions until you have heard the complete story. Keep eye contact and a relaxed but upright posture, to establish rapport and indicate that you are paying attention. Avoid fidgeting or shifting in your chair, which could be interpreted as signaling restlessness or boredom.

Understand Your Interviewee's Communication Style

Occasionally, you may need to adjust your interviewing style, to suite the needs of a particular participant.

Some speakers like to feel that they are in charge and will attempt to dictate the nature and content of the meeting, refusing to answer questions or have things clarified until they have finished speaking. You should try to be flexible, as long as it enables you to gather your information and understand the topic. Write down notes or questions and address them as soon as you can.

Other speakers may be totally reliant upon you to provide the structure and content of the interview. For these situations, the advice provided in this article will enable you to provide this in a professional manner.

Ask Lots of Questions

Many beginning writers are afraid to ask questions, for fear that they will appear to be ignorant. However, questions are the main tool that technical writers use to gather and clarify information. Use questions often, for a number of purposes:

- To get information on a specific topic
- To clarify a statement or ask for it to be repeated
- To get information on a related topic
- To challenge basic assumptions

Use both open-ended and close-ended questions. An open-ended question allows the interviewee to clarify and explain. For example: "Can you explain to me how the database replication mechanism works?" This is an open-ended question that provides the opportunity for a full answer, in the interviewees own words. A closed-ended question provides a specific yes/no or amount answer. For example: "Is the database replication feature supported? The answer is either yes or no. Or "how many records can be added to the database?" the answer is a specific amount.

Another way to approach the issue of asking questions, is to use the 5W2H technique:

- **Why**? Why is this feature required? Why is it needed?
- **Who** is going to use it? These questions gather information on the purpose of a feature and who the users are.
- **What?** What does this feature do?
- **When**? When is the feature used?

- **Where**? Where does it fit into the work flow?

- **How**? How is the feature used? This question elicits the specific steps required to implement the feature.

- **How often**? Asks whether the procedure is one-time only or administrative in nature.

Rephrase and "play back" information in your own words

This technique, called reflection, is often used by psychologists to clarify what people mean. In this method, you repeat back what the person has said to you, in your own words. For example: "So what you are saying is that if the user wants to add a record to the database, he needs to first….". This is a great technique for not only clarifying what someone else has said, but also for committing it to memory.

Take ample notes

You may remember from your varsity or school days scribbling furious notes to keep up with a lecturer. You may also very well remember your lecturers insisting that you listen first and understand, before taking notes. This advice is always a good idea. The playback technique discussed above can help you clarify and commit information to memory before taking notes. Your next task is then to record this information, so that it won't be forgotten.

Notes should focus on concepts and ideas, rather than specific sentences, unless this is a review stage and the interviewee is providing suggestions as to how to phrase or explain something.

You should have a clear and systematic system in place for taking and organizing your notes, in a manner that is quick to record and easy to find later.

Some people use a PDA (Personal Digital Assistant), such as a notepad, to take notes. The advantage of this is that it is easy to carry around, easy to use, and can be interfaced with your regular PC.

For my own purposes, I find it quite adequate to have an A4 size, bound notebook. I put the topic and date at the top of the page, underlined, and the names of the participants. I then divide the page into sub-topics and underline each sub-topic.

When review of existing material is discussed, I bring a printout of the relevant sections to the meeting and mark it up directly, either at the place where the change is to be made or on the back side of the page.

When taking notes, I prefer to use keywords and short phrases, backed up by diagrams where appropriate. The keywords and diagrams act as "mnemonic devices", which enables me to recall the context and concepts discussed.

When I consider it important, I will write down detailed notes and ask the speaker to repeat themselves, until I have it right. This way, I can be sure that I will not have to ask them to repeat the entire explanation again, at a later stage.

Some people take recorders into interviews and record the entire interview. I would only recommend this technique for lengthy lectures, where you are not familiar with the material or are not the only person being addressed. Playing back an entire conversation after an interview can be very time-consuming.

Provide a summary of the meeting's conclusions

Once the meeting has been concluded, it should be concluded with a brief summary, in which you check off each item that was on the agenda, assign action items and determine if there are any outstanding items that need to be addressed in another interview.

The meeting summary should be written up and presented to all participants as a memo, after the meeting.

Conclusion

As a technical writer, interviewing is probably one of the primary components of your day-to-day tasks. Interviewing is both an art and a science. Skill at it, like with any other endeavor, comes with practice. To approach your interviews in a professional manner, it is important that you are familiar with some of the fundamental principles of human interaction and communication. A well-structured interview provides both you and your interviewee with confidence in the process and helps to enhance your professional status.