University Connection

Performance Support Resource (PSR)

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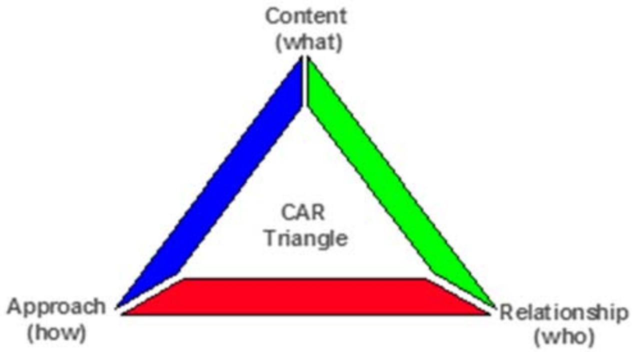
Interviewing Skills

The CAR triangle model considers different aspects inherent in any communication by classifying anything said or done under three categories: Content, Approach and Relationship.

By thinking in terms of these three aspects of communication, it is easier to identify and address factors that are not conducive to effective communication.



Using this model when preparing for, conducting and following-up client interviews helps you keep all three important communication aspects in mind.

Communication Aspects	Description
Content	**What** is said and done - the subject matter itself, the knowledge, material or issues we need to convey.
Approach	**How** the subject under discussion is dealt with. The approach is to be clear to the interviewer and interviewee and agreed upon early in the interview. During the course of the interview, if it becomes clear that the original approach proposed is not working or is deficient, new approaches are to be put forward to facilitate the interview.
Relationship	**Who** are you communicating with - the interaction and behaviors of the people communicating. Although it is a requirement that clients provide information, they will also expect to be treated in an appropriate manner. It is important to place clients at ease while gathering the required information in the most effective manner.

Interviewing Skills

The following outlines the key actions and behaviors that will help you be successful in preparing for, conducting and following-up client interviews:

Preparation

Content & Approach & Relationship

- Consider the relationship you have with the client as it may impact your preparations.
- Set up the interview appointment.
- Make sure that:
  - The appropriate person/people will be there (know their names and titles).
  - Location is agreed upon.
  - Adequate time is allowed.
  - The client understands the purpose/objective of the meeting.
  - Clarity on the specific topics you will be discussing and agreement by client to provide specific documentation for the meeting if needed.
  - Details are confirmed in writing via e-mail prior to meeting, including an agenda when appropriate. It is helpful to both you and the client to include names on the agenda of all people attending.
- Review all relevant parts of the audit file including work done to date including documentation provided by the client and discuss the status of testing and any issues with the audit team.
- Prepare a list of questions to ask during the interview:
  - Open questions: promote explanations and wide ranging replies.
  - Probing questions: assist obtaining information in much greater detail.
  - Prepare so that areas you need to probe are covered by one or more questions.
  - Start with easy ‘warm-up’ questions.
  - Avoid ‘closed’ questions where possible – use only to confirm understanding, supply specific information.
  - Create a logical sequence of questions.
  - Develop ‘back-up’ or follow-on questions to probe answers.
  - Frame your questions to help you seek qualitative and quantitative data.
  - Use multiple questions to get data from different angles.

Conducting		
	Content	• Provide an agenda or summarize the objective in the introduction. • Ask if there are any other items the client would like to discuss in addition to the agenda item(s). NOTE: Indicate at this point that these additional items will either be addressed at the end of the interview (if appropriate and if there is time) or commit to scheduling another interview/meeting to discuss them. • Provide any clarification requested by the client.

	Approach	• Use an introduction to break the ice.
		• During the main body of the interview, gather information by questioning and listening.
		• Use different types of questions to elicit different information:
		  ◦ Open questions - promote explanations and wide ranging replies.
		  ◦ Probing questions - assist obtaining information in much greater detail.
		  ◦ Closed questions - can confirm understanding, supply specific information – remember to use sparingly.
		• Don’t use leading questions or statements – “I assume you used that figure because…” or ‘Did you calculate it that way because….”
		• Don’t ask multiple questions at the same time.
		• Listen effectively, (i.e. Receive the whole message and interpret that message accurately):
		  ◦ Concentrate - focus on concepts rather than words.
		  ◦ Be aware of barriers - attitudinal and environmental distractions.
		  ◦ Clarify - confirm your understanding by asking questions.
		  ◦ Don’t interrupt people or finish their sentences for them.
		  ◦ Make summaries; keep the discussion on track.
		  ◦ Take notes which are simple, short and discerning. Consider bringing another audit team member to the meeting to assist with note taking.
		  ◦ Pay attention to departures from interview focus and tactfully point them out.
		• Demonstrate sufficient, appropriate scepticism (e.g. ask for corroborative evidence, ask follow-up questions).
		• Bring any needed reference documents to the meeting.
		• Determine if there are other people at the client site you need to interview.
		• Just prior to concluding the meeting, ask the client if there is anything they think you need to know that hasn’t been discussed.
		• Close the meeting by thanking and summarizing what happens next. Leave client with the thought that you may need to follow-up with them.

Interviewing Skills

Conducting	Relationship	• Be punctual. • Start the meeting by introducing yourself and shaking the client's hand (if culturally appropriate) - first impressions are important. • Try not to sit directly opposite the client as this gives a confrontational impression. • Allow both parties a chance to talk. • Be interested and involved in the conversation, smile when appropriate, nod to indicate you are listening and understanding. • Allow the client to talk openly and ask questions. • Look for points of agreement and note points where you disagree. • Introduce appropriate humor into the interview. • If there is any friction between you and the client, address it promptly and appropriately. This is often where ineffective communication can occur.
Follow-up	Approach	• Review your notes from the interview promptly. • Evaluate information and consult colleagues where appropriate. • Brief colleagues not present. • Define further work needed and agree on a timetable for it to be completed.
	Relationship	• Send a follow-up email to the client thanking them for their time and reconfirming any follow-up tasks agreed upon in the interview.

Good Interviewers

- Learn their skills through repeated practice
- Are properly prepared
- Are open to new ideas, methods and concepts
- Continuously evaluate their methods
- Are able to adjust their words and methods to fit the interviewee and the circumstances
- ***Above all – they are good listeners***