



GLG

The Expert Interview Blueprint

Building your interview guide

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Why Build an Interview Guide?

Speaking to experts outside of your circle of influence should be a key factor in your decision-making process, but how should you prepare for your in-depth interviews?

An Interview Guide is a comprehensive document that an interviewer uses to organize their thoughts before going into a conversation with a subject matter expert (SME). A good guide is an interviewer's best friend, helping you maintain the level of order needed to successfully extract the insights you need to make better business decisions.

A useful guide should include:

- A brief purpose statement to set the goals of your study
- A brief description of the audience you intend to speak with
- An outline of the high-level insights you hope to obtain on your call
- A well-considered list of questions that will uncover those insights

Though it is important to have a thorough guide going into your user research sessions, remember that your conversations might not follow a strict agenda. It is more likely that your conversation will be free-flowing. That is okay! The best SMEs will likely elaborate on the areas they know best and have limited input in other areas.

As the moderator, it is your responsibility to be cognizant of this and allow your subject to offer you the best insight in their areas of expertise. Some of the best insights come from these digressions. If you stray too far from the core conversation, your Interview Guide is a map that can lead you back to the heart of the matter.

GLG's Expert Interview Blueprint provides a framework to help you prepare for your next SME conversation. Depending on the purpose of your research project, we have included several questioning frameworks to help you get your prep work started.

A good guide is an interviewer's best friend, helping you maintain order and successfully extract the insights you need.



Kicking Off Your Interview

In the first few minutes of your interview, take time to introduce all parties, clarify scope, break the ice and set the tone for your conversation.

Introduction

My name is _____ and I work for _____, a company that _____ (If blinded, use first name only and skip company name). I understand that you are an authority on _____, which I am researching for this project.

Confirm your subject's time

I'm glad we're able to connect. We're scheduled to talk for about 60 minutes today. Is that still okay?

Introduce all parties on the call

If you are interviewing more than one subject, confirm that all parties are on the line. Also be sure to introduce any other colleagues who may be listening in on the call.

Confirm the scope of the conversation

Describe the purpose for the interview with just enough detail for the expert to gain an understanding of how they can help you.

Pro Tip

Kick-off tips:

1. Allow first-time SMEs to ask any process questions they may have up front.
2. Ask about the SME's related experience.
3. Ask for the SME's initial thoughts about the topic.

Confidentiality Disclaimer

As a reminder, you are not expected, nor permitted to discuss your current employer or anything that might be considered confidential, non-public, or proprietary to any third party.

Substitute your own internal confidentiality disclaimer if necessary.

Ice Breaker Questions

Break the ice and take that extra step towards understanding how your expert came to understand the matter at hand.



Understanding Unmet Needs in the Market

At the root of every need is a problem.

Often, product and marketing teams stick to what they believe their customers' problem to be, missing their day-to-day needs. Smart product development teams determine what their customers' problems really are and adjust the product roadmap or marketing message accordingly. Product teams should use the following framework to gather insight from customers, end-users, and other ecosystem partners as they seek to delight customers.

Step 1: Learn about the jobs your subject needs to complete

- What are the day-to-day tasks that you need to complete?
- Tell me a little more about those tasks. Specifically, what are you looking to accomplish when you do a task?
- Can you describe how you accomplish this task with your existing solutions?

Step 2: Learn about how the customer views existing market solutions

- What are the general disadvantages of your existing solution and how do you solve for them?
- Conversely, what are the general advantages of your existing solution?
- What are your likes and dislikes about existing solutions?
 - What are the technical advantages of existing solutions?
 - What is lacking today in how you manage this process?
 - What are your current unmet needs, and how could vendors help solve them?

Step 3: Understand Buyer Behavior

- What would be the triggers/events/motivations for re-evaluating your existing solution?
- Why did you originally pick your existing solution?



Pro Tip

Screen your SME

Come up with three screening questions to ensure that your SME is knowledgeable about your subject.

- As a purchaser (or influencer of the purchase) of this type of solution, please rate how influential various decision criteria are as below.
 - List key decision criteria
- What technologies do you need that you don't already have?
- If you were to come across an existing alternative that alleviates your dislikes, would you switch?
 - What is the cost of switching?
 - Besides cost, can you talk about other obstacles that could prevent you from making a switch?

Step 4: Understand Wants and Needs for Potential New Solutions

- If there was a new market entrant that met your needs, alleviated dislikes, and was low cost, would you switch?
- What are your near-term and future plans for this solution?
- What is the future roadmap for how you plan to complete this particular job?
- What technology would create the biggest opportunity for strategic transformation?

Step 5: Wrap Up Questions

- Is there anything I didn't ask you that I should have?
- If you were in my shoes, what else would you consider?

VOICE OF THE MARKET

Who should you be interviewing? You need a wide range of personas for a true picture of the marketplace.



USERS



SUPPLIERS



**ECOSYSTEM
PARTNERS**



BUYERS



**DISTRIBUTION
CHANNELS**

WORKSHEET

Unmet Needs

As a purchaser, please rate the importance of each factor below on your purchasing decision. Please rate on a scale of 1 to 10 with 1 representing a low level of influence and 10 representing a high level of influence.

DECISION MAKING CRITERIA	RATING (0-10)	COMMENTS
Price relative to available solutions		
Integration with other systems		
Unique technical features		
User interface / ease of use		
Customer service and support functions		



Message Testing

If every B2B marketer had a crystal ball, they could see how their marketing message would resonate before they launched a campaign. Instead, there is message testing.

Message testing helps you uncover customers' core wants and needs so you can create and refine marketing messages that resonate in the marketplace. Questions for a message testing interview should drill into a customers' professional needs and opinions.

Step 1: Understand Customer Needs

- How would you describe the major jobs that your team is looking to accomplish?
- Describe your day-to-day experience. What are your primary responsibilities?
- What are your major hurdles to accomplishing your goals?
- What tool/technology/insight would help you overcome those hurdles?
- How do you define and measure success?

Step 2: Understand Competitive Differentiation

- Have you used any other products to solve this pain point?
 - What brands? Which one?
- Were you happy with it?
 - What were the strengths and weaknesses of each?
 - Would you recommend any of them to a friend or client? Why?
- What, if anything, would motivate you to switch to a competing product?

Step 3: Customer Opinions

- List the features of a best-case product or service. At the end of the list, ask the subject which features stood out as something they want to know about. They can say "none" if nothing stands out.
 - Ask about which features are most differentiated in their mind.
 - Ask if there are features that seem missing from the profile of the imaginary product or service.

Pro Tip

Redirect when the Council Member becomes long-winded:

- *This is interesting, but I'd like to get back to a point you made earlier.*

Message Testing

List the benefits of your product. At the end of the list, ask the subject which stood out as something they want to know about. They can say “none” if nothing stands out.

FEATURE/BENEFIT	RATING (0-10)	COMMENTS

If you are message testing specific concepts, present them to the SME and ask them to rate how well your options resonate with them. Use the below to chart your results. Perhaps ask them to rank your ideas.

MESSAGING	RATING (0-10)	COMMENTS

If you are testing marketing channels, present a list of channels to the SME and ask them to rate on how often they visit for actionable insights.

CHANNEL	RATING (0-10)	COMMENTS



Assessing Market Opportunities

It's only natural to want to grow your company, but growth often depends on the marketplace itself.

Is there room for your company to offer differentiation? Is it overcrowded with competitors? Would the marketplace welcome a solution like yours? Blinded interviews with experts who are well-established in your marketplace can offer valuable insight into the current landscape.

For this type of project, it is common for your conversation to deviate from your prepared interview guide. Discovering the story of the marketplace should be a primary goal, and SMEs may take you down a road you did not initially expect. **As you progress through your series of in-depth interviews, you should look to cover all the below information, but you may only pick up bits and pieces at a time.**

When assessing an opportunity to expand into a new or adjacent market, strategy professionals will often ask themselves two general questions; objectively, is this an attractive market? And, does this opportunity make sense for my company?

GOAL 1

UNDERSTAND MARKET ATTRACTIVENESS

Step 1: Understand SME view of the landscape

- Can you start by giving me a brief overview of this marketplace? From your perspective, what are a few key themes and stories you have your eye on?
- Who are the major players in the market? Can you walk through these in a little more detail and talk about the different segments they are in?
 - Do you see the potential for any new segments?
- How does the market work from a supply chain perspective? How do the major players interact?
- What do you see as the major growth factors of the market?
- What regulatory trends might affect this market?
- What else could disrupt this market?

Pro Tip

Drill deeper by asking simple follow-ups:

- *How did you arrive at that conclusion?*
- *What are other possible outcomes if that happens?*

Ensure that this opportunity fits the DNA of your company.

Step 2: Get a sense of where market spend is going

- Talk a little bit about the spend in the marketplace. Where is the majority of spend going right now? How much are companies spending on specific types of solutions?
- Do these trends hold true across geographies? Large companies vs SMB? Other customer segments?
- How much leverage do buyers have in the pricing process?
- Will these trends hold true over the next 3-5 years?
- Do you expect any technology advancements to impact the market in the near future?

Step 3: Understand the jobs the customer needs to complete

- Who are the major customers in the market? What are the major reasons they buy?
- What are the criteria that buyers consider?
- From your time working with customers, what needs do you think are not currently met?
- Are there opportunities to develop new offerings that will meet these needs?

GOAL 2

UNDERSTAND MARKET FEASIBILITY

At this point, you need to understand a specific subset of the market. While a market may be generally attractive, you must consider whether or not you can offer valuable differentiation. Each company will have different market factors they want to understand, and you must come to the table with knowledge of your own competitive advantages and the spend that takes place in these specific areas.

This is different for every company, but the common theme is that you will take a deep dive into the needs that different categories of customers are trying to solve. But first take stock of these potential key attributes:

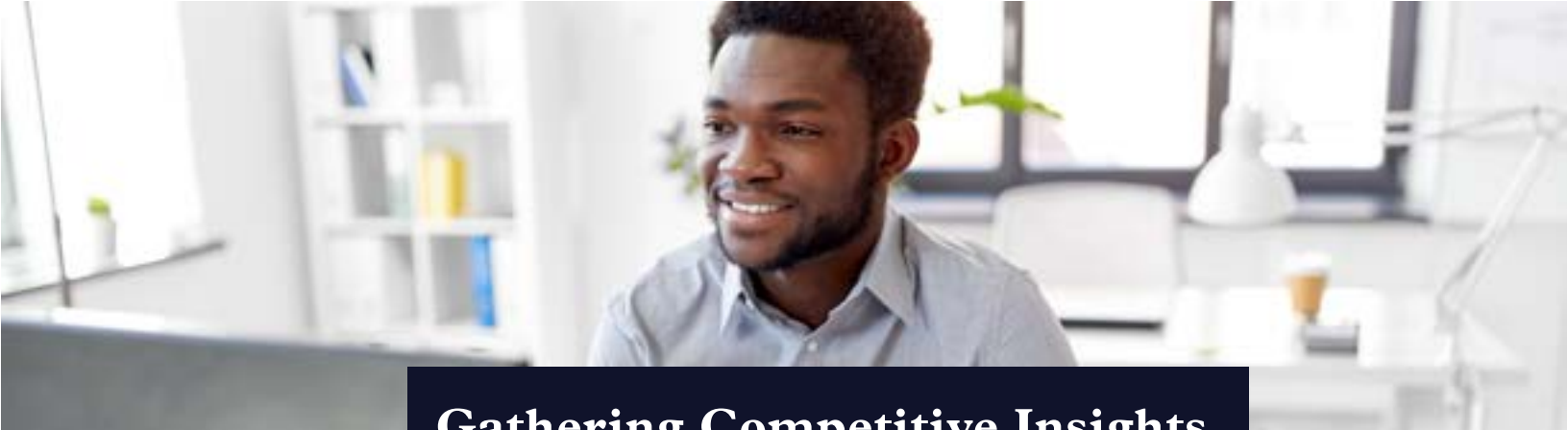
- Geography – Where do you typically compete?
- Business Model – Do you best serve enterprise customers? SMB?
- Industry – Which types of customers do you serve best? Where does your own internal subject matter expertise lie?
- Other – What are some of the other characteristics of markets where you're most likely to have success?

For each attribute, validate the following with your SME.

- General trends regarding that market
- The pain points of your key markets
 - Whether or not you can solve these pain points
- The spend coming from that market

Ask your SME questions that get to the heart of your competitive advantages.

The answers will help to ensure that this expansion opportunity truly fits the DNA of your company.



Gathering Competitive Insights

Successful companies are constantly under pressure to maintain market share.

Some of the most readily actionable insights come from understanding how competing market players are seeking to perform. If they want to maintain their competitive edge, strategy teams must ask themselves: “How are my competitors innovating?” To stay ahead of the competition, in-depth interviews with a focus on the competitive landscape can provide highly targeted insight to help shape your strategic direction.

UNDERSTAND THE COMPETITION BY SPEAKING WITH INDUSTRY EXPERTS

Create a list of the companies who are seeking to satisfy the same customer needs as you are and try to gain an understanding of a few of the top players. For these, you can ask the following questions to industry experts, competitors’ customers, and channel partners such as Value Added Resellers.

- Can you start by giving me a brief overview of this marketplace? From your perspective, what are a few key themes and stories you have your eye on?
- Can you walk through the major players in detail and talk about the different segments they target?
- What is their unique value proposition?
- How does each player in the marketplace seek to fulfill customer needs? What are the key markets in which they compete?
 - Do you see the potential for any new segments?
- What is their sales strategy?
- How does each player in the market charge customers? What is their business model?
- Where is the competition going strategically?
- How do you see this market developing?
- Who are the potential disruptors, and what are the barriers to entry?

To maintain their competitive edge, strategy teams must ask themselves: “How are my competitors innovating?”

SPEAK WITH NON-CUSTOMERS AND COMPETITORS' CUSTOMERS TO UNDERSTAND THE JOBS THAT THEY NEED TO DO

Your competitors' customers represent a huge portion of your addressable market, and they must be part of your VoC strategy. Their input will help you better understand the pain points that your products need to solve.

Step 1: Learn about your subject's pain points

- What are the day-to-day tasks that you need to complete?
- What are you looking to accomplish when you do a task?
- How easy is it for you to accomplish this task with your existing solutions?

Step 2: Learn about how the customer views existing market solutions

- What are the general disadvantages of your existing solution and how do you solve for them?
- Conversely, what are the general advantages of existing solution?
- What are your likes and dislikes about your existing solution?
 - What are the technical advantages of your existing solution?
 - What are the service advantages of your existing solution?
 - What is lacking today in how you manage this process?
 - What are your current unmet needs?

For key competitors, it is important to consider the components of how they stack up, including differing geographies, presence in various verticals, technical advantages, distribution channel strengths, R&D, pricing models, ease of use and maintenance, breadth of offering, etc.

COMPETITOR	COMMENTS



Understanding Organizational Best Practices

An organization is composed of its people, but for those people to excel, the organization's procedures, structures and systems must be aligned to fit business goals.

An organizational design interview is the process of identifying the structure underlying both successful and unsuccessful organizations, so you can apply the best practices to your own teams and avoid the common pitfalls. Questions for an organizational design interview should reveal how a team is structured, why it might be structured that way, and how that structure impacts the organization's overall performance.

Step 1: Understand where the SME is coming from

- Please share a bit about roles in the past where you have worked with this specific type of organizational team.

Step 2: Figure out the function of the organization in a best-case scenario

- Across the industries you've worked in, what have been the standard purposes of this type of functional team?
- What are the goals and KPIs of this type of this team?
- What is the typical size of this functional team?
- What are some examples of successful and unsuccessful projects your team worked on in the past?
 - What was the business outcome of these projects, and how did it match the initial goals?

Step 3: Understand how this team should be organized

- What are typically the roles that various team members play?
- How have you seen this team typically report in to the rest of the organization?

Pro Tip

Fine-tune your guide for subsequent interviews

- *Add new questions as SMEs point out new topics to consider*
- *Eliminate questions as you gain consensus and convergence*

Step 4: Understand the technology this team needs to succeed

- What tools are an absolute must-have for this team to serve its role?
- What tools are just nice-to-have?

Step 5: Understand how this team interacts with the rest of the organization

- Who are the key internal stakeholders that worked with your team?

Step 6: Wrap Up Questions

- What were some of the growing pains that teams experience? How can we prepare for them?
- If you could go back and run this team again, what are some of the changes you would make?



Ending the Interview

CLOSING THE CALL

Wrap Up with Open-Ended Questions

- What question did I not ask today that I should have?

Seek out other sources

- What other types of experts should I speak with on this subject?

End Call

- Confirm any follow up tasks and thank the council member for their time
- If you think of anything else after the call, we should plan to arrange a follow- up

NEXT STEPS

If your interviews have gone well, you should have a wealth of data to drive a smart decision. But the proof lies in the application. If you've conducted several interviews, the data must be codified and sorted. You need to understand where your expert interviews align and where they diverge. Reflect on what you've learned, and how this informs your intelligence needs.

For more tips on getting the most out of your interview, check out our guidebook, [Mastering the Expert Interview](#).

