

## Basic Interviewing Techniques

Posted on 01/02/1999 by Bruno Vanasse

*[This article was originally published at [humansource.com](http://humansource.com) and then at Competia Magazine]*

Interviewing techniques form the basics of what we call in the military jargon HUMINT *Human Intelligence*. No Competitive Intelligence [CI] professional can escape the importance of HUMINT. Reality: most CI professionals believe that, in general, more than 50% of key information comes from human sources. Even the [Central Intelligence Agency](#), which has in the last 15 years relied too heavily on technological means of gathering intelligence, mainly with satellite pictures and electronic eavesdropping, has decided to renew its ailing HUMINT capacity. Accordingly, the CIA recently started to recruit case officers with full page ads in magazines like [The Economist](#).

Interviews can be conducted over the phone, in person or, increasingly, over the Internet . In most cases, CI professionals will conduct phone interviews. However, the best way to perform interviews remains in the direct human encounter. This article will lay out the basics, step by step, for interviewing human sources in your CI work.

## In the Beginning: The Question

Your search for the right human source begins with the question, or set of questions, you must find an answer to. At this point, you must research your subject matter to map what you need to know. Develop a set of questions and find what you cant answer with other means [Internet, publications, databases, etc.]. You may not have found the information needed in your initial search, may require validation or confirmation. Once you have pretty much narrowed your focus, look for the right human sources. Obviously, **relevance** to your question or subject matter is of prime importance in selecting your human sources.

## Selecting Human Sources

The potentially adequate human source for you:

- has the either the know-how, know-whom or expertise in the subject you are inquiring about;
- is accessible from your location and can be reached;
- has the potential to credibly and reliably answer your questions;
- will not jeopardize your intelligence efforts, in the case that security is an important issue for the project at hand; and,
- will not require you to break your ethical and moral standards of professional practice.

Human sources will give you, in most cases, more relevant and precise information than other sources. You can find a relevant source by soliciting your internal and external network of contacts, going to trade shows, perusing

trade publications and ordering conference proceedings, looking up company organizational charts, business directories, ask for an expert reference from trade and professional associations, etc.

There are **seven major human sources** to target for intelligence, in the outside open source arena. Please remember that this is my unique form of radical characterization and should not be taken too literally. Each target group has a different input in your collection effort. Percentages represent a general index and may differ depending on the task at hand and the scope of the project. The seven groups are:

- **Entry-Level:** not usually well connected because working at the lower end of the hierarchy and less knowledgeable, but can give you basic information and occasionally a pearl of information you never thought them capable of. Spend 10% of your time on this group.
- **Run-of-the-Mill:** often well connected people in the business but at lower and mid-level ranks, know the intricacies of the operational or technical side of the subject and will often provide you with detailed insights. Spend 20% on this group.
- **Top Dogs:** CEOs and VPs who are well connected, knowledgeable and often talk too much for their own good. If you have access, spend 20% on this group.
- **Bandwagon Journalists:** members of this group are influential, have rarely anything substantial to contribute, except for some behind the scenes information they can't usually dish out on paper. Might be interesting though! Spend no more than 10% on this group.
- **Ivory Tower Academics:** members of this group are usually not very influential as they are mainly involved in theoretical research, but can open your eyes to a different perspective. Spend no more than 10% of your time on this group.
- **Mainstream Thinkers:** these are well connected to one another and influential, but tend to reflect conventional wisdom rather than revolutionary or innovative thinking. Spend 10% on this group.
- **Rising Stars:** usually are part of a small group, often not connected nor influential, but soon to be leaders in their field and thus may provide cutting-edge thinking and information. Spend 20% on this group.

Like any other source of information, **multiplicity** of human sources helps you verify the reliability of collected information. But first, you must be able to get the information. That is our next step.

## Planning First Contact

Once your initial list of human sources is completed, you need to plan your first contact. If time permits, do some research on the source you wish to contact: academic and professional background, articles published, family setting, contacts, hobbies, etc. This research should pretty much establish the credibility of your human source. You need to be able to anticipate how the person will respond to your first contact by asking yourself this question: why would this person answer me? Try to establish your psychological advantage. This means finding the edge you want to use to get this person to talk to you. Often, getting the person's attention with what interests them most is enough to get the conversation going. Before calling the person, try to find out different settings where the interview could potentially take place, so you will be able to suggest the best place.

## First Contact

It is usually best to call mornings on Tuesdays, Wednesdays and Thursdays. Only because your source will be less distracted by other things and will be in a better mood to talk. Let's do a step by step:

- When calling, smile. It will show in your tone of voice and will likely sound more appealing.
- Identify yourself clearly
- State the purpose of your call
- State the reference that lead you to the person, if any
- Reassure your source for confidentiality
- Give an estimate of length of the interview
- If available and needed, offer some compensation for travel and time given

If the source seems open, try to establish a time and place of the meeting, or a timing for a subsequent call. Emphasize the exchange of information and propose, if possible, a summary of your research results when your project will be completed. Re-motivate the source by showing your interest in meeting her in person.

If you encounter problems, dont overkill. You do not want to burn the source forever for you or your organization. Leave your contact number in case the source changes their mind.

## The Interview

The most important factor for getting information in the interview is to get the right climate between you and your source. You need to create a ***climate of confidence***. This is not easy with a stranger. Here is a few concrete actions you can take to get there:

- You need, if required, to reassure source for confidentiality
- Ask for permission to take notes during the interview
- Exhibit a genuine human interest in her, not only for what she can get you you can do that by
- LISTENING! Usually, the best motivator for a source is *your complete attention*
- Start with smaller stuff and go to more sensitive issues
- Be direct and honest
- Be modest, even look naive if need be nobody wants to talk to a know-it-all
- Keep mostly to the subject matter, unless you can tap on a shared experience or an apparent passion from your source in a specific subject [remember the biography you assembled on this person]
- Offer future help or part of project report make clear the exchange of information is a two-way street

Once you feel you have established the right climate, you need to get the information you need. Heres a few tips to accomplish this:

- **Keep it simple** your questions should be short and contain only one part, not two or three questions into one
- **Bracket data** for example, Does ABC Corp sell between 15-30 million or between 30 and 60 million dollars worth of Widgets?
- **Keep an open mind** while it is important that you prepare a set of questions, do NOT READ off your questionnaire nor only stick to it, because of
- **Golden nuggets** If you follow the flow of the conversation and listen to your source, you may exploit golden nuggets of information and branch into space that may be more pertinent than the questions you prepared
- **Pick their brains** these sources may be experts in their field, so when they give you information, do not feel shy to pick their brains by asking them for an analysis, asking the so what? and the what if? that you will eventually have to do when compiling your final report

# When Going Nowhere

What to do when you feel you are going nowhere? This may be for one of three reasons:

1. The source does not have, nor can have access to, the information you need. You made a mistake in selecting her. Once this is established, thank the person for her time and leave a good impression of your visit by leaving a contact number in case that person finds something for you.
2. The source does not feel like giving you the information. This may be for security purposes, their own ethics or because she may now see this as a waste of time. You have to decide if you want and should pursue the matter further, but do not break your ethical guidelines:
  - Restate confidentiality
  - Give a reference to a third person for helping her to check your background
  - Emphasize the expertise of the person this may boost their ego and may make them talk more
3. You have problem directing the interview. You may get on the right track by:
  - Redirecting the conversation toward your subject matter
  - Being more precise in your questions and project your point of view
  - Giving examples of answers needed, type of analysis required, etc.

## Closing the Meeting

Now that you have acquired all that is needed, you have to make an adequate exit. Remember to re-motivate the person, because you never know when you could need her help again or when she may volunteer further information:

- You may give a future objective, in the form of a future question or point of interest for you
- Offer future help or part of project report, if possible
- Point of contact if more information is forthcoming

## Where to go from here

Finally, your interview is over. Sometimes, it may be good to call back the source, thanking her and giving her feedback on your project. Now you need to complete your report. Next step is finalizing your intelligence collection and starting processing the information into intelligence, including the evaluation of the reliability of the information gathered, before disseminating your final results.

Enjoy and good luck with those interviews.



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