

GETTING THE SCOOP ON PRIMARY INTERVIEWS: THINK LIKE A JOURNALIST

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As a former freelance journalist who now spends his days immersed in competitive intelligence (CI) projects, I constantly rely on the research methods I learned in journalism school and later honed as a trade journalist and wire-service reporter. This has been particularly true for doing interviews—or as we would say in the CI realm, “collecting primary data.” As in journalism, interviewees (I mean, primary sources) for CI projects provide the first-hand information that supplements and confirms data gathered from secondary sources such as books, periodicals, databases, and websites.

Journalism articles and competitive intelligence projects alike require more than just secondary sources, or desk research. Too often, secondary information is sparse or non-existent, particularly when you write about a new technology or industry segment, emerging market. In other cases, your CI customer wants the immediacy of first-hand data, whether in the form of survey results or detailed quotations from telephone interviews with subject-matter experts.

This article provides some suggestions on how you can draw on journalistic techniques to “get the scoop” and then write up the facts in a clear, accurate, and compelling form.

JOURNALISTIC INTERVIEWING

Let’s be clear on what we mean by “interviewing” – you want to make sure that you and your clients are using the same definition! It can be disconcerting to spend your time conducting terrific first-person interviews when they actually wanted survey data.

Journalistic interviewing, with its frequent emphasis on highlighting interesting personalities and events, can be very different from the methods used in business. For example, you don’t need to take a “features article” approach to interviewing if you simply want to telephone an industry analyst to confirm basic market data. However, other types of projects, such as industry benchmarking or corporate profiling in support of potential investment or mergers and acquisitions, can benefit from a journalistic approach.

In this article I use the definition from Ken Metzler’s book *Creative Interviewing*. Metzler, an experienced interviewer and teacher, defines the journalistic interview as a:

conversation between two parties to gather information on behalf of an unseen audience. (Metzler 1997 p12)

A related definition comes from academic research in the social sciences. Professor Irving Seidman from the University of Massachusetts at Amherst says “I interview because I am interested in people’s stories. Most simply put, stories are a way of knowing” (Seidman 2006 p7). He asserts that this method of knowledge provides “access to the context of people’s behavior and thereby provides a way for researchers to understand the meaning of that behavior” (Seidman 2006 p10).

LOCAL COLOR

I’ve used this story-based or narrative approach in both my freelance journalism efforts and my

competitive intelligence projects. Over the last few months, Cipher conducted several international market surveys which involved extensive telephone interviews of this kind. In each case, the client requested as many first-person quotations as possible—particularly from recognized subject-matter experts—to provide greater “local color.”

Personal detail is particularly helpful when highlighting the distinctive views of individual experts. It also provides the client with more detail on the experts’ unique modes of expression, which may reflect important elements of business culture in that part of the world.

Whether a market survey has an international focus or not, it’s critical to get inside a company’s corporate culture to understand the personalities and social context. One way to do this is through solid primary interviews that include extensive first-person quotations. To some degree, call reports from these interviews resemble a good news story in their degree of first-hand detail to support the project’s key questions.

This emphasis on “local color” parallels an experience I had several years ago, when writing industry benchmarking pieces for a trade publication. The magazine focused on market and technology trends in the U.S. carwash industry, and highlighted the needs of facility owners and operators. Each article required extensive first-person comments from multiple sources throughout the country and across the entire supply chain from carwash owners/operators to equipment vendors to representatives of

SIDEBAR 1: QUESTIONS WHEN APPLYING THE “FIVE W’S AND ONE H” MODEL TO CI PROJECTS

Who should the primary sources be?

- Does your client want comments from the “man on the street” or from recognized experts?
- If expert comments are desired, does your client want the leading individuals in a particular field, or are less notable or less experienced experts acceptable?

What will be done with the primary data?

- For example, is the data intended only for an internal study, or will it be incorporated into a larger, external deliverable?
- When is the data needed?
- Primary data collection by its very nature takes longer than secondary research. With telephone research, you are at the mercy of the source’s schedule.

Where does your client want you to find primary data?

- At first glance, this seems related to the “Who” question. But even if you know that expert interviews are desired, you may not know whether you should talk only with experts from a certain part of an industry supply chain (such as end-users rather than manufacturers), or only within a certain geographical region.

Why does the client want the data?

- This focuses on issues relating to the overall business strategy.
- Do you know the ultimate purpose for the data? Is it intended only as an internal study, or will it be incorporated into a larger, external report?

How will the sources be contacted, and how will the data be collected?

- Will you use telephone interview, email exchange, a survey/questionnaire, or some combination of these and other techniques?
- How will the data be integrated into the final deliverables?
- Reach agreement on how you will identify sources. Some may desire full anonymity, while others might want only partial identification, e.g., “an experienced telecommunication industry analyst,” or “Director of Marketing at a Fortune 500 company.”
- Be clear on how you should cite primary data -- direct vs. indirect quotes.
- Direct Quotation (Attributed): John Doe, the marketing director at Acme Corp., said, “The industry outlook is excellent for 2008.”
- Indirect Quotation (Attributed): Jane Doe, the technical manager for XYZ Corp., said that the industry prognosis appeared excellent for 2008.
- Indirect Quotation (Anonymous): An industry analyst at a Fortune 500 company said that the industry outlook appeared excellent for 2008.

trade associations. I incorporated many local-color anecdotes for each piece to provide a more human context for the technical descriptions of new products and services. My own experiences as a consumer of carwash products and services gave me an additional (if unexpected) source of primary information.

PRIMARY DATA FIT INTO PRODUCTS AND SERVICES

Also consider what role primary data plays in preparing your products and services. How would your business be different (either for better or for worse), if you did not incorporate primary data into your projects and focused strictly on desk research (secondary sources)?

Above all, understand your client’s wishes regarding primary research. Identify them during your reference interview, which is part of your project planning with your client. Given the limitations of research time and budget have the client focus on essential questions, rather than trying to understand “anything and everything.”

“THE FIVE W’S AND ONE H”

Let’s look at the “Five W’s and One H” model of traditional journalism. This model relates to the six basic questions that reporters should ask themselves when preparing to research and write a story: “Who? What? When? Where? Why? How?” In applying this model to CI projects, ask yourself the questions in Sidebar 1.

Any basic journalism textbook discusses this model in at least some detail. One place to start would be the book *Journalism: Who, What, When, Where, Why, and How*, by James Glen Stovall who teaches at the University of Tennessee. Stovall’s website JPROF.com provides basic resources for teaching and studying journalism. Another

electronic resource is the *Handbook of Independent Journalism* available from the website of the U.S. Department of State's Bureau of International Information Programs.

For tips on using narrative journalism to breathe life into the “five W’s” of traditional journalism, see the poster “Tell Them a Story! The Principles of Narrative Journalism” created by Lauren Quinterno as a media-studies project at Georgetown University. This approach develops primary sources into literary characters whose dialogue and motivations provide context and insight for answering your customer’s questions.

LIMITATIONS OF PRIMARY DATA

Primary-source interviewing is a powerful tool, but it does have limitations. Make sure you manage your client’s expectations about what primary sources can achieve. Sometimes knowledgeable sources may simply not be available, particularly for niche questions. In other cases, when you’re dealing with highly-sensitive information, you may not be able to find any sources willing to talk to you.

Another issue relates to primary sources’ perceptions or biases. Robin Aydelotte, an experienced consultant in conducting primary interviews, notes that:

“Primary source data is subject to the perceptions and specific viewpoint of the source. It is also subject to the limitations of their position within the industry.”

For example, she says that *“the market view of a business with a specialty product can differ greatly than that of a business with more commodity products.”* [Aydelotte, email comments to author, January 16, 2008]

BE PREPARED – KNOW YOUR SOURCE

In journalism as in competitive intelligence, you usually have only one chance to contact a source—so be prepared! When I worked several years as a freelance writer for United Press International (UPI), I covered the latest developments from leading public-policy research institutes. The editor of UPI’s Think Tank Desk would send me the topic at the beginning of the week, and I’d have to become the “15-minute expert” on the subject of the latest report. This could range from urban planning to educational reform, from economic policy to international relations.

Usually, a quick online search provided enough background data to start. I relied on the think tank’s own websites for initial information about the topic and its authors. A quick online search found publications from other research institutes doing similar research (often from the opposite point of view). Data aggregation tools such as ZoomInfo.com proved useful for identifying other points of contact. I also found it helpful to go on Amazon.com or even the Library of Congress’ online catalog to see if a potential source had published other works on the relevant subject. (For additional information on this technique see Bates 2003 chapter on Telephone Research.)

All this background research was critical to successful story writing, in part because of the busy schedules of the people I contacted. Even when a source was willing to take a follow-up call, he or she was often unavailable due to other commitments.

Robin Aydelotte adds that prior research on the interviewer’s part also yields other dividends:

It will educate you as to what issues are current within an area of study or industry. The interview can then be more of a discussion rather than a question-and-answer session.

If you are not knowledgeable of the subject matter prior to the interview, you are wasting the interviewee’s time. Whatever time the interviewee is willing to grant for the interview, is time that is being freely donated from a busy schedule. If it seems that the whole intent of the interview is to draw information from the subject, then it is likely to be a shorter, less productive interview.” [Aydelotte, Email comments to author, January 16, 2008]

CONCLUSION

For generations of reporters, interviews have been an important technique to gather basic data as well as to gain more insight into issues. When you understand how to apply this tool to the needs of competitive intelligence, you will have an additional means for providing your clients with results that are clear and accurate—and make really good reading.

Who knows, the next phone call you get might even be from the Pulitzer Prize committee...

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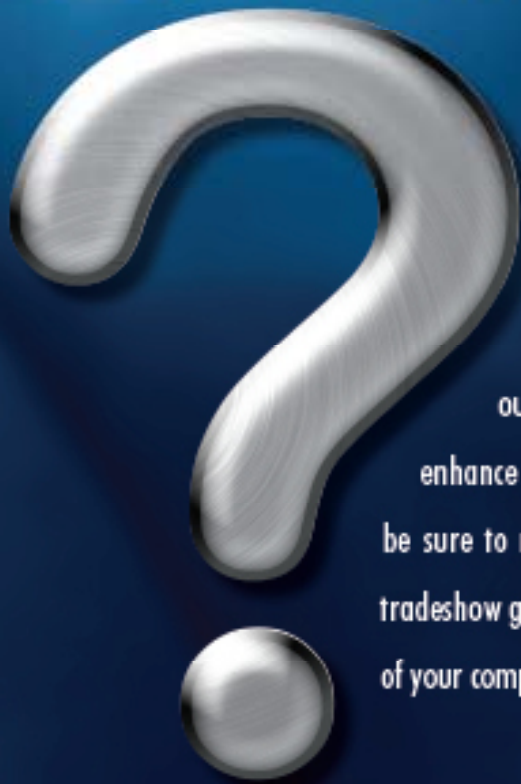
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