THE CLIENT NEEDS INTERVIEW:
Finding the Question *Behind* the Question

The ability to conduct a good client needs interview...sounds boring, doesn't it? Or perhaps it sounds like a lost art, like tatting or building a table without nails. But unless we really understand what our clients want, we can't provide them with professional information services. Perhaps it's not such an obscure skill after all.

It is possible that the ability to conduct a good client interview cannot be taught and can only be learned through experience, but there are some pointers that help info pros hone their skills and identify possible problem areas. Some may seem self-evident, some may seem overly time-consuming. But remember, the time you invest in the client interview is time you don't spend later re-doing your work when you finally figure out what your client really wanted.

Approach the encounter as a negotiation for a sale. You are providing a service that, one way or another, is being paid for. You are not an order-taker in a fast food restaurant ("do you want fries with that industry profile, sir?") Rather you are determining how best to allocate your scarce resources, in terms of your time, available resources, and your client's budget to most appropriately meet your client's needs. That may mean pulling out all the stops, and it may mean negotiating down the complexity or depth of your client's request.

While every info-entrepreneur has some VIP clients for whom no question is too outrageous, approach the client interview process with the assumption that everything's negotiable, including:

The question. You can negotiate with the client to limit the initial research or to expand the question to one that you think will better meet the client's needs.

The time frame. It is your prerogative to convey to the client that there are three aspects to information services – good, fast, and cheap – and sometimes you only get two of three.

The resources used. A client may feel that research for a particular project is most appropriately done using only open access information, for example, but it is your job to establish that an information professional is the best judge of the most appropriate, cost-effective information source.

With whom you can interact. One of the most awkward negotiations is dealing with an intermediary and explaining that, no, you really do need to talk to the person who actually needs the information so you can best understand what would best meet that person's ultimate goals.

One approach in handling the issue of getting past the intermediary to the ultimate client is to provide the go-between with a written list of questions you need answered before you can proceed with the research. Explain that it will take only a couple of minutes for you to discuss this directly with his or her boss; otherwise, you will need to have the assistant get the answers to each of these questions before you can begin. The trick here is to enlist the assistant to your side

so that you are working as a team to get the background information you need in order to begin your research.

Determine the level and depth of information needed at the beginning of the interview. Often, this can be done by your familiarity with one client who always needs in-depth research and another client who usually needs a quick summary and slide deck. That said, be sure you do not assume that a client wants "the usual" and lose an opportunity to provide higher-value service. Find out if your client expects an executive briefing in addition to the report itself. Be careful; providing too much information is just as annoying to many clients as not receiving enough. On the other hand, you want to make sure your client understands the depth of the research and analysis services you provide. You build better, stronger relationships with clients, and turn them into good sources of word-of-mouth referrals, by making sure they understand the extent of the information services you can provide.

Avoid premature diagnosis. The initial question your client asks may not be what she really wants to know. A request for information about "statistical software" may mean statistical packages such as SPSS, and it may mean relevance-ranking search software that uses statistical analysis of retrieved documents. Be sure that you have confirmed with the client what you understand the project to include, expressing the request in words other than those used by the client.

Ask the client what the results of this project will be used for. While some clients are initially reluctant to tell a consultant too much, understanding why the information is needed is often useful in determining what information to look for. Would technical journal articles be too abstract? Would statistical information be just what's needed?

Be aware of possible blockages to communication between you and the client. Some typical causes of miscommunication or lack of communication include:

* Your client's perception of your skills and abilities

* Your perception of the client's skills, ability and budget

* Your client's perceptions of resources and tools available to you

* Your client's uncertainty about the project

* Your inability to speak with client directly and in close to real-time

All of these factors can influence how well the client describes the information he needs and how well you interpret the request and negotiate the final scope of the research.

Be sure you agree on the scope and format of the deliverable. Does the client want a Word file or a slide deck? Are copies of background articles, patents or podcasts useful? Would a spreadsheet of relevant statistics be of value?

By concentrating on all the various aspects of the client interview, you can help clients to better articulate their information needs and can provide information services that best meet those needs.

Ask the right questions. The following are a few questions that help to get at the question behind the question:

What do you mean by -----?

What do you already know about -----?

What do you expect me to find?

Are there any sources you have already checked or that you would recommend?

If I can't find exactly -----, what would be second-best?

How will you be using the information?

So, in other words, what you'd like me to find is -----, right?

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