


What Do You *Really* Want?: Successful client-needs interviews

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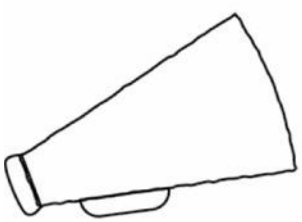
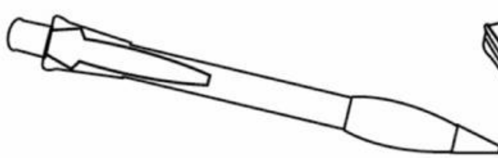

Mondegreens – we've all experienced them. Did you ever hear Jimi Hendrix sing "'Scuse me while I kiss this guy" instead of "'Scuse me while I kiss the sky"? Was Creedence Clearwater Revival telling us "There's a bathroom on the right" or "There's a bad moon on the rise"?

These misheard spoken phrases are called mondegreens; the name comes from writer Sylvia Wright, who misheard the lyrics of a Scottish ballad. Rather than "They hae slain the Earl o' Moray / and laid him on the green", she heard "They hae slain the Earl o' Moray / and Lady Mondegreen". Mondegreens are tricky because they make sense, kind of. You don't quite catch all the words, but your brain fills in the blanks with something that seems reasonable in the context.

Misunderstandings are amusing when nothing is at stake. They are not so funny when you jump to the wrong conclusion while you are talking with a client about a project. I will never forget when a long-time client in the telecom field called me and asked for

trends in the "mobile marketing" arena. I assumed he was referring to advertising on mobile devices and it wasn't until the end of our conversation, when I made a passing comment about Facebook and iPhones, that he said "Wait – you don't have any idea what I'm talking about, do you?" It turns out he was interested in mobile billboards – trucks designed not to carry freight but simply to be driven around town displaying advertising on their side panels. Had it not been for a chance remark, I would have been completely off in my deliverable and my client would have lost confidence in my ability to understand his concerns.

Back when I worked in corporate libraries, we called these interactions reference interviews (or *client information needs assessments* if you want buzzwords), and we tended to take them for granted. "Oh, yeah… that's when the client tells you what she wants and you find out when you need to get it to her. Just be sure you get all her contact information."

The longer I've been an information professional, the more I realize that there is a lot more going on during a reference interview than just getting the client's name, email address and description of the research question. While it seems straightforward, the reference interview is actually a negotiation process and can often serve as a subtle marketing tool. And, of course, unless you really understand what your clients want, you cannot provide them with the results they need.

The biggest mistake most of us make is assuming that we know what our client is talking about. We want to be easy to work with – I call it being frictionless – so we try to make the conversation as streamlined as possible. We assume we know why a client is calling, what's motivating the request. Or we assume we can learn everything we need in an email exchange, not realizing that all the juicy insights come from the follow-up question, the "can you say more about that?" prompt. Or we assume that the client's needs this time are generally the same as they have been in the past, leaving us flat-footed when it turns out that our client is on to something new.

I used to think that the most important question during a reference interview was “If I can’t find exactly what you want, what would be second best?” It’s the $64,000 question, because it prompts my clients to think past their initial conception of the issue and to think of what they really want.

But now I think I have a $6 million question, because it moves beyond the request and gets to the result. I now ask, “What will you do next, after you’ve read my report?” I am trying to figure out what my client’s ultimate outcome is – what is the problem to be solved, the decision to be made, or the next step to be taken?

In addition to gaining a better grasp of my client’s concerns, I often find that asking “what next” enables me to design a better deliverable in a format more conducive for whatever is going to happen next. If my client is going to share the results with her staff, I might offer a slide deck with key points highlighted. If my client says he is making a decision on the feasibility of a new market, I will include a chart with the key risk elements highlighted.

Even the most straightforward request may not turn out to be so simple once you've discussed it. I'm reminded of a super-searchers panel I moderated at a conference a couple of years ago. I gave each super searcher what I thought were a few very straightforward, one-dimensional questions to start the conversation. The approaches they took went into entirely different aspects of the question – often going into angles I had never thought of.

Clearly, even if both you and the client think the question is obvious, there are often hidden ambiguities. Be sure to go into enough detail to determine that you really are on the same wavelength. It often helps to re-state your understanding of the request at the end of the reference interview, using words other than those the client used, to ensure that you both agree on the work to be done.

How you handle the reference interview sends a message to your clients. Do you ask open-ended questions that encourage additional discussion? Do you engage in a live conversation rather than email? Do you take the time to ensure you understand your client's ultimate goal? Is there something else your client would value but hasn't thought to ask you for?

By viewing the reference interview as an integral part of your services, you can ensure better outcomes for your clients and the professional satisfaction of being able to truly meet your clients' needs.

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