Site Visit Interview Tips and Techniques

Below are a few tips and techniques for conducting meeting and walk-around interviews during site visit.

- Arrive a few minutes early and be prepared for interviews to start at the time listed on the agenda.
- Introduce yourself. Ask the individual's name if it is not offered.
  - If it is a group interview, have everyone in the meeting introduce themselves—including any other examiners in attendance.
- Document the name(s) of the individual(s) you are interviewing on the Site Visit Interview Log found on the Examiner Resources page of the TNCPE website.
- Begin the interview by summarizing the topics you will be discussing (e.g., "The questions I have are related to how you develop your strategic plan and action plans, how the plans are deployed to your workforce and partners, and how you measure their achievement and effectiveness.")
- Remind the interviewee(s) that you are not looking for "right" answers and are not trying to find faults in the organization. You are only trying to get a better understanding of the organization's processes and results.
- Let the interviewee(s) know that you, or one of the other examiners (i.e. your Item Back-Up), will be taking notes so you can be sure that you capture all the relevant details.
  - ***Pro Tip:*** *In meeting interviews, take notes directly on the worksheet for the SVI being discussed. There should be a separate worksheet for each SVI.*
  - ***Pro Tip:*** *In walk-around interviews, make sure you document the question(s) to which the individual(s) are responding. Sample walkaround questions are available on the Examiner Resources page of the TNCPE website.*
- Ask simple, straightforward questions using the applicant's language and terminology. Avoid "Baldrige-ese" and other types of jargon.
- Do not ask leading questions and be careful not to inadvertently prompt answers. For example, ask, "How often does the planning team meet?" rather than "Does the planning team meet every week?"
- Do not provide feedback to the interviewee on their processes and results, including feedback that is prescriptive or consultative in nature.
  - **Do not discuss** personal or team observations, findings, conclusions, or decisions—whether critical or complimentary.
  - **Do not give** verbal or nonverbal feedback related to the applicant's responses during the interview.
  - **Do not share** information or practices from your own organization, or from other applicant organizations.
  - **Do not suggest** approaches or practices for the applicant to implement.
  - ***Pro Tip:*** *If someone from the organization asks, "How are we doing?" you should simply tell state that the team is still in the process of gathering information, so it is premature to answer the question. However, you can compliment the applicant's hospitality and cooperation in helping the team to better understand the organization's processes and results.*
- Record any documentation or other materials requested and/or received during the interview.

- **Prior to concluding the interviews, ask the individual or group if they have any additional information they want you to know**. You may have missed something the applicant feels is vital.
- Thank the interviewee(s) for his or her time and communicate appreciation for the applicant's effort.