



How to Win at Interviewing B2B Subject Matter Experts

A “been there, done that” guide for
copywriters and content creators



**Radix
Communications**

Introduction:

The Importance of Interviewing Experts

Interviewing subject matter experts is an essential part of the B2B content creator's job.

We all want our content to be authoritative, relevant, unique and useful to our audiences, and it's hard to do that without extracting authoritative, relevant, unique and useful information out of the people who know the topic best. And that means getting really good at interviewing.

At **Radix** we believe interviewing is one of six key skills every great B2B writer needs (see the box for the other five), and one of the hardest to learn.

And that's why we've created this guide. In the course of our work we've conducted thousands of interviews with B2B tech experts, on everything from drawing up a tiered data storage strategy to understanding how vulnerable automated cranes are to GPS jamming.

When you conduct that many interviews, you get a really good feel for what you can do to get the best information from every expert. We've distilled all of that knowledge into this guide, and we're happy to share it with you, to help you in your mission to create great B2B content.

It will give you tons of advice on how to get the most from briefing calls and face-to-face interviews. It'll also look at some of the things that can get in the way of a great interview, with advice on how to overcome them.

The 6 Core Skills of the B2B Content Creator

To create great content for a B2B audience, you'll need these six essential skills.

1

Great writing: You know your way round a sentence, are handy with a metaphor, and truly get how to write a compelling argument.

2

Industry knowledge: You don't need to be a talking head for the industry, but you absolutely need to know enough to speak to the right people, and tell them what they need to know about your client's product or service.

3

Business experience: You know what a supply chain is, you know your kaizen from your Kanban and if someone asked you to hold the fort while the CEO nipped out for a sandwich, you probably wouldn't completely suck.

4

Marketing knowledge: A bit obvious, maybe, but worth stating all the same. You just get marketing. You know the different types of content, the strategies, the metrics, and how to bring them all together.

5

Interviewing skills: You're confident, comfortable and curious in meetings and phone briefings. You know the questions that will draw out the most interesting information for the audience, and you're not afraid to ask them.

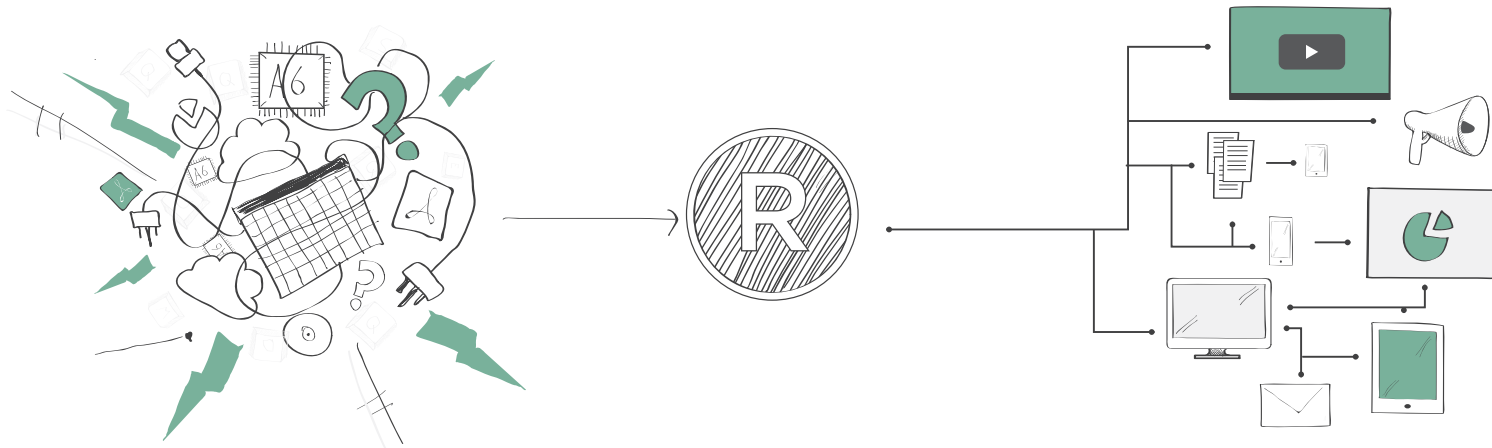
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Audience empathy: You never start a project without a persona, which means you can readily put yourself into the shoes of an ambitious HR manager or a put-upon compliance officer.

About Radix:

Radix is a copywriting agency specialising in the B2B tech sector. Bringing together some of the industry's sharpest copywriters, Radix has conducted thousands of interviews, calls and workshops with subject matter experts to tease out the stories that make great content.

We originally created this guide to help our own newbie writers get good at interviewing subject matter experts. They found it extremely valuable, and we hope you will, too.



Part One:

Preparing for Your Interview

Preparation is the key to a good interview, so make time for it. If possible, do the prep right before the call, so you are already “in the zone” when the call starts.

A good rule of thumb is 30 minutes’ prep for a 30-minute interview and an hour’s prep for an hour-long interview. You may need more or less time, depending on things like how familiar you are with the topic, and the length and complexity of the piece(s) of content you are going to create.

Your prep routine should include the following steps:

1. Understand what the interview is designed to achieve.

What content will you be creating as a result of it, how does it fit into the wider campaign, and how will it meet overall marketing objectives? This will give you a good handle on the kind of information you’ll need to get, and start to give you some thoughts about the questions you should ask during your interview.

2. Know who you’ll be talking to

and why that person has been selected as the subject matter expert. If you don’t already know them, look them up on LinkedIn – anonymously, if need be. What is their area of expertise? What are they likely to know about / not know about?

- Ⓡ If they’re a sales person, they may not know anything about the logistics/rationale of the campaign, but if they’re a marketing person they may do.
- Ⓡ Check their seniority — senior people ought to have more and better insight (not always)
- Ⓡ If they’re a sales person, they are a goldmine – as they have direct contact with customers and know the kinds of things that customers will want to know / be interested in.

3. Read the background materials you've been provided.

If you don't have background, ask for it. In the absence of any background materials, do what you can to research the topic yourself.

4. Make a list of questions you'll want to ask to get the right information.

You don't have to send the questions to the expert, but you should use them to guide the interview. Never assume that the person will be coming ready to brief you and all you'll have to do is listen. Your job is that of an interviewer, teasing the right information out of the client to create a brilliant piece of content.

5. Have an idea of timing.

Realistically, how much information can you get from the time that's been allocated for the interview? If you only have a short time, prioritise your questions so you can at least get the most important ones answered. If you feel the time that's allocated is not enough to get everything you need to create everything you need to create, ask for further interviews to be set up, or for additional information to be provided.

6. Make sure you have all the access details!

If you're conducting your interview over the phone, or via video conferencing, make sure you have the access details to hand. Put them at the top of your call notes document, along with your spokesperson's name, title and LinkedIn bio.

Part Two:

During the Interview

There's lots you can do during the interview to create a great rapport with the person you're interviewing and get the best possible information from them.

Here are 17 things you can do to ensure everything goes swimmingly:

1. At the start, summarise what the interview is for.

What are all parties aiming to get from it? To set expectations and show you are calmly in control, say how long you expect the interview to take and ask if everyone is still available for that amount of time.

2. Use the best method you know for capturing the whole discussion.

This could be recording the interviewing, taking handwritten notes, typing as the person speaks, or a mixture of these. But don't assume you'll remember things — get as much down as you can, as verbatim as you can, especially if you plan to use verbatim quotes in your write-up (as with a case study, for example).

Interview Recording and the Law

NB: If you plan to record the call, you **MUST** say so and get all participants' permission before you begin.

In the UK, informing all parties that you intend to record the call — and letting them know how you will use the recording — is a legal requirement under the Data Protection Act. Other countries may have different laws regarding recording. Check up on these before you record an interview.

3. Say you've prepared some questions in advance

and that you will use them to guide the interview.

4. Go through your questions.

A good way of breaking the ice and putting the expert (and yourself!) at ease is to ask an easy question first. An ideal one is to ask them to explain their job role and their mission within their organization. From their answer to this question you can start to gauge how comfortable the person is with briefing you, how much they will talk, etc.

5. Keep track of time

to ensure you'll get all your questions answered. If there seems to be plenty of time, you can explore interesting topics in more depth. If time is running out, you can mentally re-order your questions and make sure you at least get the key ones answered. Summon all your meeting-chairing skills to move the conversation on, and make sure you get everything covered.

6. Be prepared to explain why you're asking a particular question.

It's extremely unlikely you'll be called out on the questions you ask. But on the off-chance the expert seems hesitant to answer your questions, be prepared to explain how each question will help to produce a better end-result.

7. As you go, gauge the knowledge of the person you're interviewing.

It may become apparent that they don't have the right info to answer all your questions, in which case just get what you can. On the other hand, it may become apparent that they know lots of useful stuff, in which case don't be afraid to ask extra questions out of curiosity, as long as you have time and they're not too off-topic. You may be able to use that information later in a different piece, if not this one.

8. Don't be afraid to ask about anything you're not sure of.

The hardest thing about B2B copywriting is that you're often writing about things that lie outside of your own experience. But remember, your interviewee is the expert – your job is to translate their expertise into compelling content. So don't be scared to ask questions like: *"I'm not familiar with that phrase, can you explain it?"* or *"I'm new to this particular area, can you explain what you mean by..."*.

If you think you understand, but you're not sure, you can say things like: *"I may have got the wrong end of stick, but should I understand from this that xxx"* or *"So does that mean that xxx, or have I understood this all wrong?"*

9. Ask for real-world examples.

Anecdotes, stories and real-world examples will bring your content to life and make it much easier and more pleasant for your audience. So ask questions like: *"How would that work on the ground, what kind of difference would it make?"* or *"Have you seen any customers doing that? What was the result?"*

10. Ask if they use any analogies

to explain their topic. Analogies are another good way to bring your content to life, and it can be really helpful if someone has already thought of them. You can ask things like: *"How do you pitch this to customers, how do you explain the benefits – are there any nice analogies that you use?"*

11. Ask if there are any industry stats

or reports that they like to refer to, or any research they've seen recently that backs up what they're saying. Including facts and stats from authoritative sources will make your content more credible, and it can save a lot of research time if your expert already has some go-to numbers that you can use.

12. Be genuinely interested and curious.

This is a great way to build rapport, and the better the rapport, the better the information you will get. People (usually) love being asked questions, and they love people being interested in the things they do. So say things like: *“That’s interesting, what reaction did customers have...?”* You can also refer back to something they said earlier in the call, to show you’ve been listening and that you’re genuinely interested in what they have to say.

13. Look for structures and narratives in what the person is telling you.

For example, if the expert says something like *“We usually go through a five-step process with customers”*, you could start thinking about writing a “Five Steps to Successful XXX”-type piece. This takes practice, but as you do more calls, you’ll find you get better at starting to construct a story in your head from what you’re hearing. Then you can think (on your feet!) about how the story might unfold, and ask questions to fill any gaps. At the end of the interview, summarise how you think the story might roll out.

14. Connect up your knowledge.

You’ll produce a richer piece of writing if you can link what your expert is telling you with other, relevant trends affecting the same audience. So rather than treating each briefing as a standalone topic, try to connect it with knowledge you’ve acquired elsewhere. You can say things like: *“I’ve got the impression from other people I’ve spoken to on this topic that...”* or *“I read an article that said XXX, is that also your experience?”*

15. Wrap up five minutes before the end.

Then ALWAYS ask if there’s anything important to add that hasn’t been covered. This is essential, as one of two things will invariably happen: either the expert will confirm you’ve covered everything but will then reiterate what they consider to be the most important points (very useful), or they will bring up one or more points that weren’t already discussed, and often this is where the most interesting stuff comes out.

16. Ask any other interviewers if they have any questions to ask:

If any of your colleagues are sitting in on the interview, ask them if they have any additional questions to ask. They may well have some great questions you might not have thought of yourself, and people always appreciate being given a chance to pitch in to the conversation.

17. Wrap up the call.

Thank everyone for their time and valuable contribution. Ask the expert if it's OK to follow up with them for any additional info, and if so, take their contact details.

Part Three:

What to Do if Things Start Going Wrong

Not every interview goes brilliantly. Lots can happen to make an interview less useful than you might have hoped. But that doesn't mean all is lost.

In our experience, here are the main things that can go wrong, with tips on how to overcome them.

1. If the spokesperson is not who you expected

ask them to explain their role, their responsibilities, and how they were connected to this project. Hopefully this will give you enough insight to be able to re-prioritise or reword any questions on the fly.

2. If the spokesperson isn't prepared

and still feels like they're not in a position to brief you even after you've explained the objectives of the interview, offer to reschedule the interview.

3. If the person is only giving you one-word answers, despite your efforts to ask good questions

ask if they would prefer to answer your questions by email. Although a verbal briefing is infinitely preferable for a writer, because you can ask follow-up questions to be sure you get all the information you need, some people simply feel uncomfortable answering questions verbally.

4. If there is a language barrier

ask if they would prefer to answer your questions by email.

5. If the person seems unqualified to answer the questions, or isn't giving you what you want

tactfully ask if there's anyone else they would recommend you speak to for some additional perspective, then try to set up a call with that person.

6. If there are several people on a call

and you can't easily distinguish between them, but it's important you know exactly who said what, ask everyone to state their name before they talk.

7. If a person says they've briefed you on this topic already

when they mean one of your colleagues, politely say that you weren't part of that briefing, and you appreciate they have been over this already with your colleague, but it will create a much better result for the project if they can go over it again with you. Always let them know you appreciate their time.

8. If you don't understand something the person is telling you

ask them to explain it again. If it's very technical, explain that you are not technical, and so they will need to bear with you. Get it all down, and ask if there are any materials or slides they can send you to support what they're saying.

9. If a person questions your lack of knowledge (this happens very rarely)

say the purpose of the interview is for them to transfer their expert knowledge to you. Make sure to ask them some smart questions to show that even though you're not familiar with the topic, you know what *kind* of questions to ask. Generally, people like to be asked smart questions about stuff they know about.

Part Four:

Useful Questions for Any Campaign

If you're very new to interviewing, these questions can help you get the right information from a subject matter expert:

- ④ Who is the audience? (Their role, type of organisation they work in, outlook on life)
- ④ What are their business issues / business goals / personal aspirations?
- ④ How can this product / solution / brand help them with those?
- ④ What “trigger events” will cause this audience to start looking for a solution?
- ④ What are the risks to them of not investing in a new solution?
- ④ What competition do you have (vendors, other approaches, the audience doing nothing?)
- ④ What makes this product / solution / brand different from those competitors?
- ④ What makes it better than competing solutions?
- ④ What objections do customers typically have to this product / solution?
- ④ How do you counter those objections?
- ④ Are there any misperceptions about the brand / product / solution that we should correct?)
- ④ Which customers are using this product / solution well today? Can we mention them?
- ④ What do we want the audience to do as a result of reading this asset / communication?

Thank You

Thanks for reading this guide. We hope it helps you get the most out of every expert interview you conduct. (And if you ever — PLUG ALERT — need help with interviewing experts or writing top-notch B2B content, we know a friendly copywriting agency that can help...)

The Radix Team