

Pisacane - key learning points from telephone training

1 - Intro

- Find some common ground, get the conversation going, tell who you are. Better leave out the "analyst" part and maybe stress that you're not from sales. Last thing you want them to think is that they are being approached by a telemarketing company. Instead, tell your doing research and working on a new development and that you want to learn about the opinion of the customer before spending the money.
- Refer to the respondent as the most knowledgeable or "expert", this prepares him to live up to the expectations
- Emphasize the value for them > may be it's interesting for you to have another player/supplier in the market / better product / discount / send the presentation (also helps when the respondent thinks the interview has taken long enough)
- Never introduce with "I'd like to ask some questions", instead introduce with "I want to have a discussion" / "exchange opinion"
- "The loop": Minimize the duration of an "awkward silence" that might occur when:
 - A respondent refuses or is afraid to answer (in the beginning of the interview)
 - or even refuses to have a discussion altogether
 - A respondent doesn't know the answer
 - Has doubts about the conversation you want to have

A possible way to overcome this, is to immediately come back to him with new information, a new view on the situation, another question, ...

Example: Potential "loops" when the respondent is questioning whether the answer is something he should be sharing with external parties > I'm just looking for an industry average, not anything confidential/company specific

Do the loop quickly enough, do not let them ask the questions, control the conversation

Annoying questions during the intro

- Can you send us an e-mail first >
 - Yes, Of course! I can send you an email. But it's just 2 questions I want to ask. It will both save us a lot of time if I can just ask him ...
 - Its R&D in early stage, no documentation available yet. I don't feel comfortable putting it in writing. Just a discussion to see whether there is interest in the product
 - I'd like a short discussion to see if he is the right person before I send this via mail
- Doesn't work here anymore / he is not here right now / not in the office > Connect me to his replacement? (Sounds positive)

- We are only a small company, we are not representative > we are especially looking to include small companies, they are often more flexible and innovation minded.
- He is not here but he will not be interested > Not interested in market and competitor info? You want him / her to think they will get "blamed" for not sharing the information.
- Against company policy to fill / do not participate in surveys > First of all make clear this is not a survey or market research, emphasize that it concerns a very early stage R&D project, we are the ones taking the risk to disclose our ideas, but we need to hear the opinion from the market before investing further, lots of investment involved
- Why give you inputs if we are competitors >
 - I'm not here to ask for any company confidential data. But do you think I am in the right range?
 - We are a wire supplier, not a competitor. We are looking to improve our products.

Tips

Tell them some well known names that you have interviewed in the industry

Tell them something they can relate to (problems associated with the crisis, industry events, increase of imports, ... = break the ice)

Mention their competitor's situation to raise their interest.

We like to share our understanding

Good opening lines: "I read an article from you / in which you were mentioned", You are really somebody, I asked for an expert in ... and they connected me to you. ~ I am speaking with industry experts to gain understanding.

Spend time to find names, plant locations, ..., get referrals from inside their organization.

Start with smaller or less important companies where you can screw up.

Sound as if you call there every day.

2 - Interview

- The best question is no question at all. Questions often raise suspicion, definitely in the beginning of the interview. Let them react (correct) your statements when you challenge them by guestimates. For more info and refined techniques have a look at the theory of "elicitation".
- Be aware of the situation the respondent is in. An open office or any presence of other colleagues will make the respondent think harder about what he should or should not say to external parties.
- Calling back to people when they are in their car makes sense from this perspective and from a time/availability perspective

- Power of silence: periods of silence make people feel uncomfortable and people will start telling things they wouldn't normally do (do this only after the conversation has evolved and the respondent feels comfortable with answering and talking, opposite of the loop)
- Ask them for substitutes (what other products are used to replace, ...?) instead of trends
- Repeat keywords (to give you time to think and to remember better)

Tips to get hard data (numbers)

Ask as for things as "a matter of fact" eg NOT: can I get his name? (this implies that there is a reason not to get it), BUT: what's his name?

We have some old data, is this 60 - 70% (own estimate / calculation) still valid?

I have heard that you have about ..., someone was saying ... , this BU of you can not represent more than xx tons (provoke them and they will tell you a thing or two, mankind has a natural tendency to correct)

Make up a figure (guesstimate) and work with that (right range, higher? / lower?)

Make up a number you have from "a competitor" and observe their reaction.

Ask for a range / give a range

Talk about something else, then come back to the question a second time (the loop)

Make a matrix on beforehand. This allows you to backward calculate, puzzle your answer using small clues or save time when noting down

I understand you don't know the figure exactly, but just give an estimation.

- "Salami tactics": It happens that the respondent doesn't know the exact answer because he never considered reality in the way we ask our questions. Nonetheless they do have a lot of useful information that could allow you to reconstruct the answer. You can break down your question in bits and pieces (cf slices of the salami) and make the calculation yourself afterwards.

3 - Leading out

Maintain good relations, ask if you can call back and if they are interested to receive the study.

Emphasize the value they had for your project.