

**Anatomy of a Subject Matter Expert Interview  
For Task Analysis**

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**BY**

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## PREPARATION

Before you interview:

1. Find out the background of your target population.
  - \*Educational Level
  - \*Male/Female Ratio
  - \*History of Project
  - \*Job Environment
2. Read related documentation for the task(s).
3. Call the SME and select a mutually convenient interview time.
4. Choose a quiet environment for the interview, if possible.

## HOW TO DRESS

RULE: Don't draw attention to yourself.

- Follow applicable safety dress codes.
- Dress at the same level as the SME.

## OPENING THE INTERVIEW

- Smile; reinforce to the SME that the interview is going to be a pleasant experience. Make small talk.
  
- If the interview is in the SME's environment, act as if you are a guest in their home.
  - Don't touch anything
  - Ask permission to smoke
  - Sit down only when you are asked
  - Don't chew gum
  
- If the interview is in a neutral area, act as if the SME is your guest.
  - Ask the SME to sit down
  - Try to make him/her comfortable

### THEN:

1. Introduce yourself.
2. Explain to the SME what you are trying to accomplish and why you are talking to him/her.
3. Explain the SME's role in the interview.
4. Explain how the data you gather in the interview will be used.

## DEALING WITH SME CHARACTERISTICS

IF YOU BELIEVE THE INTERVIEWEE TO BE:	THEN PROCEED IN THIS MANNER:									
Deceitful	<ul style="list-style-type: none"> <li>• To check for correctness of answer, ask SME for data you already have</li> <li>• Later in the interview ask the question in a different way and compare answers.</li> <li>• NEVER ARGUE, but if SME consistently gives incorrect data, close the interview.</li> </ul>									
Unwilling	<p>Ask them if they have a problem with being there.</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: center;">IF:</th> <th style="text-align: center;">AND:</th> <th style="text-align: center;">THEN:</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">YES</td> <td style="text-align: center;">They agree to talk to you in spite of this</td> <td style="text-align: center;">Ask them if they want to continue.</td> </tr> <tr> <td style="text-align: center;">NO</td> <td></td> <td style="text-align: center;">Thank them for their honesty and close the interview.</td> </tr> </tbody> </table>	IF:	AND:	THEN:	YES	They agree to talk to you in spite of this	Ask them if they want to continue.	NO		Thank them for their honesty and close the interview.
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YES	They agree to talk to you in spite of this	Ask them if they want to continue.								
NO		Thank them for their honesty and close the interview.								
Non-Believer (SME doesn't believe you can describe his job.)	<p>Tell him/her that you know how complicated their job is, but you need to get all the information you can and would they please help you.</p>									
All-Knowing	<ul style="list-style-type: none"> <li>• Compliment them on their knowledge.</li> <li>• Use positive and negative reinforcement to get information.</li> <li>• Keep them on track.</li> <li>• Do your best not to become irritated.</li> </ul>									
Skeptical	<ul style="list-style-type: none"> <li>• Discuss their distress. When their frustration is shared, the SME can relax.</li> <li>• Accept their fears and reassure them that their fear is a normal response.</li> </ul>									

Continued.

IF YOU BELIEVE THE INTERVIEWEE TO BE:	THEN PROCEED IN THIS MANNER:
Wrong for the information requested	<ul style="list-style-type: none"> <li>• Determine when to stop the interview.</li> <li>• Close in a professional manner.</li> <li>• Tell them you are sorry for the inconvenience and you appreciate them making the time to speak to you.</li> </ul>
Suspicious of your intentions	<ul style="list-style-type: none"> <li>• Reassure the SME, but don't make promises you can't keep.</li> <li>• If the SME does not trust you, close the interview.</li> </ul>
Condescending	<ul style="list-style-type: none"> <li>• Thank them for giving up valuable time to help you and begin the interview.</li> </ul>

## QUESTIONS TO ASK

IF YOU NEED TO:	THEN ASK THESE QUESTIONS:
Analyze to operant level	"What signals you to do this task?" "What do you do?" "For what purpose?" "What happens when you do it?"
Analyze to step level	"What do you do?" "For what purpose?" "How did you do that?"
Scope the task	Ask for the last step first, then, "When do you know to start the task?"
Clarify Data	"I'm not sure I have this right" "I don't understand....." "Can you give me some examples?" "What do you .....(see, hear, smell, taste, feel)?" "What do you mean by.....?"
Stimulate additional conversation	"If.....?" "If not.....?" "What if.....?" "Always.....?" "Any other possibilities?"

## PROBLEMS IN INTERVIEWING

IF:	THEN:
You hear verbs like "check" and "ensure"	Make SME tell you what s/he does to "check" and how to "ensure"
The SME tells you the next step is to do two things at once EXAMPLE: "I would start the XYZ system and stop the QYK pumps then."	Break behavior into smaller level of detail The brain cannot do two things at once, so SME has to identify which step is done first.
SME says "I make a mental note of it."	You have covert behavior that needs to be described at the operant level.
If data on behavior does NOT make sense to you	<ul style="list-style-type: none"> <li>•DON'T tell SME s/he is wrong.</li> <li>•Tell SME you don't understand and ask for another explanation.</li> <li>•Explain to the SME why the data does not make sense to you.</li> </ul>
The interview is going to have more than one analyst and/or more than one SME present	<ul style="list-style-type: none"> <li>•Assign roles at beginning of interview.</li> <li>•NO ROLE SHARING, ie, only one analyst, one SME, etc. Extra people can be notetakers, observers of process, etc.</li> </ul>
The word "it" is used as an answer	Make the SME define what "it" stands for and write that down, not "it." This will prevent confusion when you transcribe your notes.
You need a break to clear your head or to think of a strategy	Tell SME to break for 5-10 minutes. (An interview is NOT a contest of stamina.)
SME answers: <ul style="list-style-type: none"> <li>•"I don't know"</li> <li>•"Because I just know it"</li> <li>•"I'm sorry, what did you say?"</li> </ul>	
SME starts to fidget	

Problems in interviewing.....cont'd

IF:	THEN:
You feel rushed	Stop. Take a deep breath and continue.
SME talks so fast you can't keep up	Ask the SME to talk slower because the information they are giving is so good you don't want to miss anything.
You are running out of time	Make sure the information you have is correct and reschedule an interview to continue.(Quality is more important than quantity)
SME is confused by paradigm format	Use algorithm (flowchart) format to note data.

## NOTES ON NOTETAKING

When we are paradigmizing, we work as a team. We assume two roles: Analyst and Notetaker. We change roles regularly so we can retain both skills. Using the largest whiteboard available, the analyst questions the SME and writes the paradigm on the board while the notetaker copies it down and checks for errors. (Hint: 11 "x 17" paper is the largest size most copiers can handle.) This method has worked very well. It provides a check by the notetaker of any mislabeled S's, R's, or missed discrimination/generalizations and is efficient because the SME is there to clear up any problems or questions. The analyst can erase and rearrange data on the board quickly and does not have to stop the interview to copy data onto paper.

Whether you are working in a team or not, below are a few hints to help you in your notetaking.

- Always label each sheet of data you are going to keep with:
  - Each participant and their role.
  - Task title.
  - Date.
  - Project name.
  
- When you finish your interview transcribe your notes immediately. Don't wait until the next week or "first thing Monday morning". Your notes might appear to be written in a foreign language!!

### Video and Recorder Pro's and Cons

#### Pro's

\*You don't have to write down every detail and therefore can concentrate on assimilating data in your mind, NOT on writing.

\*It is easy!!

### Cons

- \* The sound is usually awful unless a microphone is worn, and background noise can obscure voices.
- \* Both are time consuming - you double your time when transcribing.

### CLOSING THE INTERVIEW

Close the interview with a polite thank you and answer any additional questions the SME might have.

# PARADIGM: Anatomy of an Interview for Task Analysis

page 1 of 5

**S1**  
SME present  
ready for interview.

Ask SME "Why  
are you here?"

**S2.1**  
SME is fully  
briefed.

Decide if SME  
is positive or  
negative toward  
interview by evaluating  
comments.

**S2.2**  
SME has  
partial briefing.

Give SME tailored  
briefing.  
(go to **S2.1**)

**S2.3**  
SME has no  
idea why s/he  
is to be  
interviewed.

Give SME full  
briefing.  
(Go to **S2.1**)

**S3.1**  
SME disagrees with  
purpose of the interview -  
"This is a waste of time.  
You'll never be able to  
analyze my job."

Ask why s/he  
feels that way.

**S3.2**  
SME says the interview  
is a good idea and says  
that s/he is looking  
forward to it.

Thank the SME and  
reinforce that s/he  
was chosen because  
of outstanding ability.







