

NKP BEST PRACTICES:

## **SCOPING AN EXPERT INTERVIEW REQUEST: CHECKLIST AND TEMPLATE**

Copenhagen, August 2018

## HOW TO SCOPE A REQUEST FOR EXPERT INTERVIEWS

July 2018

### Introduction

This expert interview request checklist and template was written to help clients quickly scope a request for expert interviews. Every project and client request is unique, so this should be used as a framework for inspiration, and not as a plug-and-play user manual.

The guidelines are based on findings from the many expert interviews we facilitate on a daily basis, however they are by no means exhaustive. We would like to point out that many of the interviews we facilitate are carried out successfully without a detailed request description: we can help you define the right expert profile regardless of how much (or little!) you currently know about the subject.

We recommend you also read our guidelines on HOW TO CONDUCT AN EXPERT INTERVIEW with template interview guides founder under "RESOURCES" on <https://www.nordicknowledgepartners.com/>

## Checklist

Note: We get most requests from clients by email and phone. In both cases, it makes the search easier for us if we have the below inputs to work with. Going through the checklist also helps clients build a better understanding of what they are actually looking for. If you are in doubt about the below, your dedicated NKP account rep will gladly formulate the request for you.

Try to include the following in your request (if possible - see example on next page):

- Brief context of the request
- Type of companies the expert should have experience from (examples if relevant)
- Your perspective/role in the value chain (i.e. manufacturer, retailer, customer)
- Geographic scope in prioritized order ("Global" also works)
- Example interview topics or questions
- Whether both former *and* current (or *only* former) employees of the relevant companies would be ok to interview as experts\*
- Total number of expert interviews expected
- Timeline for having the first expert line-up ready
- Timeline for executing interviews

\*A note on potential experts being current vs. former employees and conflicts of interest:

- Relying on current employees of a relevant company as experts is always more tricky than former employees ("Formers"), since we need to be extra careful to ensure a consultation does not represent a conflict of interest (legal or ethical)
- This is subject to a case-by-case assessment, however as a rule of thumb: if you are working at, with, or for a direct competitor of the company where the expert is currently employed, then any consultation is a no-go, regardless of the topic of discussion
- In an investment situation, this corresponds to a situation where you are already in dialogue with the target company (or its owners) in which case you cannot talk to experts who are currently employed at a competitor of the target company

## **Example request (“best-practice”)**

Subject: *Experts on Nordic and German vaping market*

*Hi Phil,*

*We are currently commencing a new case for a vaping manufacturer and are looking to build a better understanding of the Nordic and German vaping markets (vaping as in smoke-free cigarettes). Specifically, we need inputs on market trends, size, outlook, regulations etc.*

*We are looking for relevant experts in the following categories:*

- *Vaping specialist retailers / retailers & manufacturers*
- *Traditional retailers*
- *Manufacturers*
- *Industry associations*

*We are expecting to kick-off the effort on Monday morning and complete the majority of interviews within the first week. Likely, the scope will be between 10-20 interviews total.*

*I have provided some names below to help with the search (not exhaustive). Of these companies, we are looking to speak to current or recent former senior management.*

*Example specialist retailers: iSmokesmart.de, ELM vaping*

*Example manufacturers/brands: Avoria, Highendsmoke*

*Example associations: Interessengemeinschaft e-dampfen*

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### Notes:

- The above example (from a real case) discloses the names of the relevant companies. Often, our clients do not know these, which is not a problem; we will identify the right companies as part of our research
- It also discloses what type of client our client (a consultancy in this case) is working for - knowing this may help us tailoring the search, but it is by no means necessary
- Needless to say, all client requests are completely confidential and will only be seen by your dedicated account manager at Nordic Knowledge Partners

## NORDIC KNOWLEDGE PARTNERS IN BRIEF

### ABOUT NORDIC KNOWLEDGE PARTNERS

Based out of Copenhagen, Denmark, Nordic Knowledge Partners is a specialized knowledge services firm which connects professional clients with leading industry experts.

We work to accelerate professional knowledge-sharing and empower better business decisions across all sectors. Industry leading corporations, top-tier consultants, and investment firms rely on Nordic Knowledge Partners' ability to identify and provide access to the best industry experts in an efficient and expeditious manner.

We deliver access to the highest-quality experts across all geographic markets.

### HOW DO WE DO THIS

We connect you with subject-matter experts through direct confidential micro-consulting engagements - typically one hour on the phone. These individuals may include former executives of a specific company such as an M&A target, customers and competitors of a specific company, as well as function-, or geography-specific experts.

Most of the experts we engage with are not working as consultants nor are they actively looking for consulting work. As a result, we operate a high-touch personalized service model to ensure that all engagements are meaningful, saving time for both our clients and expert advisors.



**Andreas von Buchwald**

**CEO & FOUNDER**

A handwritten signature in black ink, appearing to read 'A. von Buchwald', written in a cursive style.