

# Interview Checklist

Based on Brian L. Joiner's STAT 998 notes

- Preparation
  - Has each party done his/her homework before the meeting?
  - Did the statistician do any homework for the session, either in terms of learning some about the subject matter or researching the types of statistics expected?
  - Did the researcher prepare any visual aides to help describe the problem? Were some simple numerical or graphical summaries used to help describe the data?
- Getting Started
  - Was the researcher made to feel reasonably comfortable?
  - Was the meeting started promptly?
  - Was the agenda for the meeting clear or was time wasted going through the formalities of setting the agenda?
  - Did the statistician appear clean and dressed reasonably?
- Goals of the project
  - Was the central goal of the project made clear?
  - Were secondary goals probed?
  - Was the statistician of any help in goal clarification?
  - Was the statistician able to ask probing questions in a diplomatic way?
  - Were boundary conditions made clear (i.e., what sorts of data could not be gathered; what procedures were ruled out because they were difficult or impossible)?
- Status of the Participants
  - Was the discussion one between equals or was one party clearly the “leader” and the other the “follower”?
  - Was the level of discussion such that both parties could understand most of what was going on? Was unnecessary jargon used?
  - To what extent was fear, exasperation, anger, shyness, etc. interfere with the success of the meeting?
  - Did the participants appear to emerge as collaborators out of the meeting?
- Interaction
  - Was the statistician a good listener? Did the statistician make good use of “play back” techniques?
  - Did the statistician help the researchers focus on the important issues?
  - Did the statistician offer tentative proposals to get the researcher's reaction?
  - Was the statistician and effective speaker when needed?
- Science of the problem
  - To what extent did the researcher get new insights into his/her own problem from the consultation? Or was most of the discussion centered on the statistical techniques?

- Did the statistician dig into the problem deep enough to get adequate understanding of the statistical requirements?
- Statistical Approach
  - Was a statistical approach chosen?
  - If so, was the chosen approach a good one? or do you have some doubt in your mind as to whether it is appropriate?
  - If not, was it clear why an approach was not selected? Was the effectiveness of the meeting clearly diminished by the failure to choose a statistical approach?
  - Did the statistician make effective use of the researcher's expertise and intuition as to how the data should be collected and/or analyzed?
  - To what extent did the researcher come away with a better understanding of appropriate statistical methodology? Was it a good learning experience for the researcher?
  - Was the level of the statistical procedure appropriate for the task? To the researcher's capabilities? To the time budget for the proposal?
  - Was sufficient emphasis put on the graphical and exploratory analysis?
- Future plans
  - Was it clear what each party had responsibility of doing next?
  - If it solution was not readily at hand was it clear how progress would be made towards a solution?
  - Was the time frame of the project made clear? Were any deadlines made clear?
- Budgets
  - Was the amount of effort the statistician was to spend on the project made clear?
  - Was it clear that the researcher thought that was a reasonable amount of effort?
- Rewards
  - Was there any discussion as to how the statistician was to be given credit for his/her work? Should there have been?
- Interferences
  - Did either party stray undesirably from the central theme of the discussion?
  - Did bureaucratic or other details get unnecessarily in the way?
- Overall
  - Did the time seem to have been well spent?
  - Did the pace of the session seem about right? Was it too rushed or too low key?
  - Did the researcher seem reasonably pleased with the session?
  - Did the statistician seem reasonably pleased with the session?
  - Did the statistician come across as having a reasonable level of statistical expertise? In the specific statistical area needed for the problem?
  - Did the researcher come across as having a reasonable level of expertise in the subject matter? In the statistical methods needed for the problem?