

## The 30-Minute Information Rescue

*or, how to interview a subject matter expert when there's no time to spare*

A teammate has given their notice and they're the only person who knows an essential tool or process. There's no time to train someone else. Everybody wants a slice of this person's time. It sounds like a crisis, right?

Wrong. **It's only a crisis if you let it be a crisis.** But it's time for an information rescue mission. Here's what to do and what to ask, before it's too late.

### ***About this guide***

Hi, I'm [Daniel Beck](#) and I wrote this. 🙌

You probably got a copy of *The 30-Minute Information Rescue* by signing up for my email newsletter. If you didn't, then please [sign up for updates](#) to this guide and other resources to help you make and manage your documentation.

## Set expectations

Before you start scrambling to ask questions and write things down, get sight of your real goal. You can't do a brain transplant and you're not going to become an expert overnight. But you can learn enough to maintain minimal viable utility with your tool or process. Stay focused on getting the essential information that will keep you up and running and help you to learn more on your own.

To get that information, you're going to conduct a tightly-focused interview with your subject matter expert (SME). You're not going to have a free-wheeling conversation about everything your expert knows; you're going to

come into the interview with a specific subject in mind. If you need to know about more than one separate tool or process, then repeat the rescue mission for each on their own.

## **Plan your interview**

As soon as you can, schedule the first meeting – and perhaps last – with your SME. Here's what you need right now:

- A little bit of time. Thirty minutes is a perfectly reasonable duration. (Don't ask for more than an hour – you probably won't get it anyway and you'll exhaust your expert.)
- A quiet space for you and your SME. Preferably separate spaces. (Yes, really; face-to-face is sometimes inconvenient for this situation. There's more on this in the next section.)

The sooner you can schedule the meeting, the better. It's possible to do an information rescue on someone's last day on the job – I've done it! – but having a little bit of time for follow-up questions is better.

If you have lots of time, schedule more than one meeting with your expert. One 30-minute conversation can cover a lot of ground if you're prepared, but two 30-minute meetings a few days apart can be more useful than one 60-minute meeting.

## **Recording your interview**

If you can record your interview, do it. Recording frees your time and attention to ask more questions and listen to more answers. Of course, don't forget to tell the SME why you want to record and get their permission first.

This is what makes remote or virtual meetings preferable: it's usually easier to record voices, faces, and screens with your favorite video conferencing software than it is to get and set up recording equipment in a conference room.

If you can't record your interview, then you'll have to take notes. Taking notes yourself is fine, but bringing a trusted, designated notetaker to the meeting who isn't you or your SME is better.

## **Ask deliberate questions**

Before your meeting, review this list of suggested questions and customize it as needed. Remember that you need to prepare yourself to work with this tool or process on your own. Avoid getting mired in details before you've oriented yourself.

Question	Purpose	Possible follow-ups
If you could only tell me one thing about this, what would it be?	Set the tone. What's most important? Let's focus on that.	
What's this thing called?	It's hard to search for more information on your own, if you don't know the right terminology.	<p>What's the official name?</p> <p>What do you actually call it?</p> <p>Was it previously known by any other names?</p>
What problem does this solve?	Get the context. Tools and process aren't important <i>per se</i> ; they're important for the outcomes they support.	<p>What situation are you in when you think, "I need this"?</p> <p>What did you do before you started doing this?</p> <p>If this disappeared, what would you do instead?</p>
Who uses this?	There might be other experts after all. Find out who they are.	Who do you use this for or who asks you to use it?
Where do I get this?	Find out how to get the stuff needed to use the tool or process.	
What's the first-time setup?	Find out how you know you're ready to start using this.	
Can you demo this for me?	Ask them to show it to you in action. This is where recordings are really helpful.	If you can't demo it, can you give me a tour of the tools, files, inputs, etc.?

Question	Purpose	Possible follow-ups
What doesn't work?	Get to know the pitfalls. You're going to struggle with this later; you may as well know how it's going to happen.	What do you expect to go wrong? What are the "gotchas"?
Where do I learn more about this?	Get leads on information that will support learning on your own.	Where's the: <ul style="list-style-type: none"> <li>• Original copy?</li> <li>• Email list?</li> <li>• Documentation?</li> <li>• Source code?</li> <li>• Bug tracker?</li> <li>• Forums?</li> </ul>
Who made or maintains this?	Triple check there's no one else to talk to about this.	

## Wrap up

As soon as possible after your meeting, thank your expert. A little thank you can go a long way to ease future follow-up questions, if needed.

Within 24 hours of your interview, review your recording or notes to make sure you got everything. If anything was poorly captured in the meeting, take notes now while your memory is fresh.

You may feel like the work is done at this point. Not quite. Within one week of your interview, synthesize something from your meeting: use the tool or process yourself, write a README, or summarize the interview. Do something to fix that information in your brain and prove that you've learned something new.

At this point, you've done it: you've rescued some information. You probably didn't get everything you wanted, but if you're lucky, you've helped your team avoid some of the pain of brain drain.