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Challenges and Best-practice Recommendations for Designing and Conducting Interviews with Elite Informants

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ABSTRACT Elite informants (i.e., those in the upper echelon of organizations) are a key data source for building and testing theories in management research. We offer best-practice recommendations to overcome challenges in designing and conducting interviews with elite informants (EIs) based on a comprehensive and multidisciplinary literature review and information provided by subject matter experts (i.e., authors of recently published articles that included EI interviews). Given unique characteristics of EIs and differences compared to interviewing non-EIs, we provide recommendations on how to address challenges related to: (1) research design (e.g., what is the best order for the interviews?); (2) data collection (e.g., how can researchers access EIs? what is the best format for the interview? how can researchers obtain more honest responses?); and (3) reporting of results (i.e., what information should researchers report and to whom?). Finally, we offer suggestions for future EI research focusing on methodological issues.

Keywords: elite informants, methodology, qualitative research, review

INTRODUCTION

Six decades ago, Kincaid and Bright (1957) interviewed 37 'business elites' including company presidents, vice presidents, and executives to understand how company headquarters affected operations of their subsidiaries and why production was concentrated

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primarily in a few companies during war. The reason for the ongoing interest in the use of interviews with business elite informants is rather obvious: these individuals have the power to shape their firms' strategic direction and influence the lives of people both inside and outside their organizations. Therefore, business elite informants (i.e., those in the upper echelon of organizations) are a key data source for building and testing theories in management research (Basu and Palazzo, 2008; Hambrick and Mason, 1984).

The goal of our article is to present challenges and solutions in interviewing elite informants (EIs) in business settings. We do so by relying on a comprehensive and multidisciplinary review of the literature as well as information provided by subject matter experts (SMEs) (i.e., authors of recently published articles that included EI interviews). To enhance the usefulness of our article, we present these challenges in the form of questions faced by researchers planning on conducting EI interviews covering aspects of (1) research design (e.g., what is the best order for the interviews?); (2) data collection (e.g., how can researchers access EIs? what is the best format for the interview? how can researchers obtain more honest responses?); and (3) reporting of results (i.e., what information should researchers report and to whom?).

We offer three clarifications. First, we do not focus on data analysis given the existing literature that applies to both elite and non-elite informant interviewing (e.g., Charmaz and Belgrave, 2012; Roulston, 2014). Second, our recommendations are applicable regardless of a researcher's ontological perspectives and how the resulting data are analysed and interpreted as long as a study involves conducting EI interviews. Third, some of the challenges and solutions we describe are also applicable, to some extent, to other types of interviews. However, even when a particular recommendation may also be useful for interviewing in general, we illustrate how these practices need to be adapted to the unique nature of EIs.

In short, our article contributes to the literature on EI interviewing, and qualitative methodology more generally, by synthesizing the existing multidisciplinary evidence, relying on the expertise and extensive experience of SMEs who have recently published research using EIs in influential management journals, and offering actionable solutions specifically contextualized for EIs. Next, we define elite informants and highlight key differences between interviews with elite and non-elite participants.

ELITE INFORMANTS

The interest in EIs lies in the power of these individuals to influence their communities particularly in business settings, where they can dramatically change an organization (Bergh et al., 2016; Carpenter et al., 2004; Hambrick and Mason, 1984). As summarized in Table I, there are several definitions of elite informants, ranging from top-ranking executives (Giddens, 1972; Kincaid and Bright, 1957) to highly skilled professionals (McDowell, 1998), and to people with substantial power and expertise not possessed by others (Richards, 1996; Vaughan, 2013). Relying on the existing literature, Aguinis and Solarino (2019, p. 1293) offered the following definition, which we also use in our article: 'Elite informants are key decision makers who have extensive and exclusive information and the ability to influence important firm outcomes, either alone or jointly with others (e.g., on a board of directors)'.

Table I. Existing definitions of elite informants

Source	*An elite is/ elites are…*
Kincaid and Bright (1957)	top-ranking business executives
Mills (1958)	[individuals] so placed within the structure that by their decisions they modify the milieu of many other men [sic]
Dexter (1970)	people in important or exposed positions [who] may require VIP interviewing treatment on the topics which relate to their importance or exposure
Giddens (1972)	people included in the upper echelon of the firm
Richards (1996)	a group of individuals, who hold, or have held, a privileged position in society and, as such, as far as a political scientist is concerned, are likely to have had more influence on political outcomes than general members of the public
McDowell (1998)	highly skilled, professionally competent, and class-specific
Odendahl and Shaw (2002)	… Individuals and groups that occupy the top echelons of society
Welch et al. (2002)	an informant… who occupies a senior or middle-management position; has functional responsibility in an area which enjoys high status in accordance with corporate values; has considerable industry experience and frequently also long tenure with the company; possesses a broad network of personal relationships; and has considerable international exposure
Undheim (2003)	people who occupy, by heritage, merit or circumstances, a key/place in power networks both online and offline
Robson (2008)	those who occupy formal positions of authority within institutions and organizations
Ryan and Lewer (2012)	business owners, executives and senior managers, key officials from industry/business associations and lobby groups – the 'managerial class'
Vaughan (2013)	groups of status, … employment, title or function in society gives them a degree of power or expertise not enjoyed by the majority
Huggins (2014)	actors who are in a privileged position in relation to a particular activity or area of policy, often having direct influence over it
Empson (2017)	a combination of the status of the profession as a whole, the ranking of the organization within that profession, and the reputation of the interviewee within that organization.
Aguinis and Solarino (2019)	key decision makers who have extensive and exclusive information and the ability to influence important firm outcomes, either alone or jointly with others (e.g., on a board of directors).

We focus on business elite informants because they pose unique challenges to management research that other types of elites do not. For example, Hartz and Imber (1995) highlighted differences between various types of elites and a critical one is about accessing them. Professional elites are the most accessible, as it is possible to buy their time for an interview at an appropriate rate. Political elites are accustomed to engaging and interacting with the public, and dedicate time to cultivate relationships with their constituents

(Mikecz, 2012; Ostrander, 1993). Business elites, moreover, are not accountable to the general public for their actions (although this is now somewhat changing given a general increased in accountability and flow of information). Their time cannot be bought for a fee and they do not have spare time at their disposal compared to some philanthropic elites (Odendahl and Shaw, 2002). Second, business elites pose more challenges during the interview itself. For example, business elites tend to respond to questions with more suspicion compared to other types of elites, due to the fear of losing an advantage to a competitor (Hartz and Imber, 1995). They also fear that the disclosed information could be used against them (Welch et al., 2002), making it harder for the researcher to establish trust and have a frank and open conversation. We explore these and other challenges in detail later in our article.

Differences between Elite and Non-elite Informant Interviewing

There are important differences that create unique challenges and make interviewing EIs distinct from interviewing non-EIs. These distinctive aspects of EI interviewing include the researcher-informant power distribution, elite informants' expectations, researcher's role, and the unique contribution of each interview and of outliers. Table II includes a summary of these differences, which we describe next, because they have implications regarding EI interviewing methodology.

In addressing elite versus non-elite status, we emphasize that the designation of elite should not be considered as an 'all or nothing' status. It reflects differences in the standing between the researcher and the informant. In many cases, researchers have interviewed CEOs of multibillion dollar firms, partners of large law firms, and high-status individuals early in their careers or while not being affiliated with a high-status university (e.g., Powell, 1996; Crossan and Berdrow, 2003; Stephens, 2007), making the status difference a more salient issue. Indeed, Stephens (2007) noted that many researchers use the term elite in a relational sense, defining informants either in terms of their social positions compared to the researcher or to the average person in society. We, therefore, use the labelling of elite versus non-elite informants to stress the differences between the two extremes of the continuum.

Researcher-informant power distribution. When interviewing EIs, the distribution of power between the interviewer and informant is generally inverted compared to that during interviews with other types of informants. In an interview with a non-elite informant, the investigator usually owns the process of the interview and determines how the interview is conducted and which questions will be asked. In interviews with elites, however, the informant usually holds greater power and status (Ostrander, 1993; Thomas, 1993). This power reversal affects how the interview is conducted. In fact, elite informants are likely to pose gatekeeping questions to assess and evaluate the interviewer's expertise (Cassell, 1988; Dexter, 1970; Hunter, 1995; Zuckerman, 1996) before deciding whether researchers' background, experience, and preparation give them sufficient credibility (Hertz and Imber, 1993). For instance, Vaughan (2013), in a study on why a highly acclaimed British law failed to achieve its purposes, described how one of the law firm partners highlighted Vaughan's mistake concerning how the name of a law was written:

Table II. Summary of key differences between elite and non-elite informant interviewing

	Elite Informant Interviewing	*Non-elite Informant Interviewing*
Researcher-Informant Power Distribution	• Elite informants are usually more powerful than the interviewers • Elite informants usually attempt to) control the interview process (e.g., where and when the interview takes place and which questions to answer) • Elite informants are likely to pose gate-keeping questions to assess and evaluate the interviewer's expertise	• The interviewers usually have greater power and status than the informants • The interviewers usually own the process of the interview and determine how the interview is conducted and which questions will be asked. • Non-elite informants are unlikely to challenge researchers' knowledge
Elite Informants' Expectations	• Elite informants expect a knowledgeable and articulate interlocutor who can offer a stimulating dialogue • Elite informant will generally resist interviewers who fail to demonstrate an appropriate understanding of the topic under investigation • Elite informants often are unwilling to accept an investigator's assumptions	• Non-elite informants are more willing to accept the investigator's assumptions
Researcher's Role	• Elite informants usually require a more flexible and personalized approach • The interviewers usually change their role from guiding the interview and defining the questions to a more unstructured approach in which the informant may determine the flow and order of questions	• The researchers usually leads the interview
Unique Contribution of Each Interview and of Outliers	• Answers often carry unequal weights across informants • A few informants likely have access to privileged and exclusive information and are able to clearly articulate an organization's situation	• Answers are generally assumed to carry similar weight among informants

'Part IIA' rather than 'Part 2A'. In doing so, the interviewee established his superior status and made the interviewer feel deferential, ultimately altering the entire data collection process.

Elite informants' expectations. EIs usually expect a knowledgeable and articulate interlocutor who can offer a stimulating dialogue (Hertz and Imber, 1993), and they will generally resist interviewers who fail to demonstrate an appropriate understanding of the topic under investigation (Undheim, 2003). EIs are often unwilling to accept the interviewer's assumptions and, instead, are eager to explain how they view the issue being discussed (e.g., Ostrander, 1993).

Researcher's role. EIs require a more flexible and personalized approach, and they 'appreciate being treated as [unique and special] individuals' (Zuckerman, 1972, p. 174). Therefore, when interviewing EIs, researchers usually change their role from guiding the interview and defining the questions and take a more unstructured approach in which the informant may determine the flow and order of questions (Dexter, 1970; Thomas, 1993). We address advantages and disadvantages of different types of interview formats later in our article.

Unique contribution of each interview and of outliers. In interviews with EIs, the answers provided by some of the informants usually carry more weight than answers from others. A few of the informants usually have access to privileged and exclusive information and are, therefore, able to clearly articulate an organization's situation. Similar to the treatment of 'interesting outliers' in quantitative research (Aguinis et al., 2013), these unique responses can be particularly useful for new theory development or elaboration (Fisher and Aguinis, 2017).

In short, the differences between elites and non-elites, as well as the different issues involved in interviewing elites, create unique challenges in terms of designing and conducting effective interviews. Thus, we next address best-practice recommendations on how to design and conduct empirical research involving interviews with elite informants.

DESIGNING AND CONDUCTING INTERVIEWS WITH EIS: LITERATURE REVIEW AND ADVICE FROM SUBJECT MATTER EXPERTS

Clearly, we are not the first to address how to interview EIs. In fact, given that the method has been used for decades, several authors have already highlighted some of the unique challenges associated with interviewing EIs (e.g., Kincaid and Bright, 1957; Hertz and Imber, 1995; Ryan and Lewer, 2012). Accordingly, our first step was to conduct a comprehensive and multidisciplinary literature review. As a second step, we gathered advice from subject matter experts: authors of recently published articles that included EI interviews. We describe each of these procedures next.

Literature Review

We implemented Aguinis et al. (2018) recommendations for conducting state-of-the-art literature reviews. Our goal was to identify sources that describe challenges and also evidence-based recommendations regarding interviewing EIs. As a first step, we used the keywords 'elite interview*', 'studying up', and 'elite informant*' with the Web of Science, Google Scholar, and Sage Research Methods databases because they include sources across many different fields. We obtained 289, 1,500, and 20 results, respectively. As a second step, we removed sources that were included in more than one database. Third, we manually examined each of the abstracts and retained sources that included recommendations. We erred in the direction of including a source that may not be relevant rather than excluding a source that may be relevant. Fourth, we conducted an 'ancestry search', which involved reviewing all entries in the References sections of relevant sources to locate additional ones (Aguinis et al., 2011).

Both authors and a coder were involved in the search and selection process, which resulted in a total of 46 sources: 33 journal articles, three books, seven book chapters, two working papers, and one Sage Research Method Case. But, not all of these sources offered evidence-based recommendations. For example, some were based on authors' opinions. Also, some did not focus on business elites, but on social or political elites. In our review, we only included sources published across several disciplines (business, geography, political sciences, sociology, and law) on interviewing EIs that focused on business settings and offered evidence of the effectiveness of their recommendations. In the interest of transparency and full disclosure, as recommended by Aguinis and colleagues, Appendix A includes the list of all 46 sources.

Advice from Subject Matter Experts (SMEs)

As a second source of information on which we based our recommendations, we collected information from subject matter experts (SMEs). Specifically, we contacted authors who published in *Academy of Management Journal* (AMJ), *Administrative Science Quarterly* (ASQ), *Journal of Management Studies* (JMS), *Organization Science* (OS), and *Strategic Management Journal* (SMJ) from January 2015 to September 2019 (including in-press articles) using interviews with EIs.[1] These are SMEs because they are authors who successfully published their research based on EI interviews in some of our best journals. We chose these specific journals given their impact, reputation, and prestige, and also because they publish both micro (e.g., organizational behaviour) and macro (e.g., strategic management) research.

We contacted the corresponding author of the study or the first author. We obtained email addresses from the article or the authors' university profiles. In total, we identified 62 authors. Then, we sent personalized emails asking the following questions:

1. In conducting your interviews with elite informants, what were the top four most challenging aspects? These can include issues about identifying or getting in touch with them or anything related to procedures or things that happened before, during, or after the interviews.
2. What did you do (if anything) to address each of these four challenges? Did each of these actions work? Why or why not?

After the first round of emails, we received 25 responses. We sent a personalized reminder after a week, generating 12 additional responses. Three authors redirected our inquiries to their co-authors, whom we subsequently contacted. Three authors were unwilling to participate in the study. In total, we collected 37 usable responses for a response rate of 60 per cent.

We used an open-coding approach to identify the issues present in the SME replies. The open codes were then clustered in issues. The top-ten most frequently mentioned topics and percentage of SMEs that mentioned each are the following: (1) accessing the informants (78 per cent), (2) capturing informant attention (41 per cent), (3) approaching informants with the right interview approach (35 per cent), (4) time and location of the interview (30 per cent), (5) obtaining honest responses (30 per cent), (6) dealing with a

Table III. Key questions and challenges to address when conducting elite informant (EI) interviews (Answers to each of these questions are included in the body of the article)

Research design

- Is interviewing EIs required or even necessary?
- What is the best order for the interviews?
- What is the right time in the research project to interview an EI?

Data collection

- How can researchers access EIs?
- What is the best format for the interviews?
- How should researchers manage power dynamics?
- How can researchers obtain more honest responses?
- How should researchers engage EIs?
- Should researchers conduct remote interviews?
- How should researchers conclude the interview?
- How can researchers secure follow-up interviews?
- How can researchers improve the trustworthiness of the resulting scholarly paper?
  - How can researchers improve the credibility and dependability of the study?
  - Should researchers seek disconfirming cases?

Reporting of results

- What information should researchers report and to whom?

sensitive topic (16 per cent), (7) managing informant bias (16 per cent), (8) identifying the right informants (14 per cent), (9) securing follow-up interviews (14 per cent), and (10) managing confidentiality (14 per cent).

Other topics that the SMEs considered important but were not mentioned as frequently are the following: capturing all the information shared by the informant (11 per cent), being properly prepared for the interview (11 per cent), triangulating data (11 per cent), obtaining specific answers (8 per cent), establishing a relationship with the informant (5 per cent), gaining legitimacy (5 per cent), reporting (5 per cent), managing the bias of the researcher (3 per cent), using the right jargon (3 per cent), and managing contingencies (3 per cent). We will refer to responses by the SMEs as we describe challenges and solutions in the next section.

Next, we offer recommendations in the form of the usual sequential steps in the research process. To enhance the usefulness of our recommendation, we describe them in form of key questions that need to be answered when conducting interviews with EIs. In asking and answering these questions, we follow the usual sequence of an empirical research study: Research design, data collection, and reporting of results. As a preview, Table III includes each of the questions, to which we provide answers next.

Research Design

Is interviewing EIs required or even necessary?. Researchers planning to conduct interviews with EIs must first consider whether their research questions may be answered more appropriately using other data sources that may also involve less time and effort

(Richards, 1996). To do so, it is necessary to understand the unique advantages, if any, that interviews with EIs offer to the interviewer because these advantages may not be applicable in all research contexts.

First, interviewing EIs allows for an in-depth understanding of decision-making processes, organizational narratives, and how certain individual characteristics including attitudes, values, and preferences may have played a role in shaping the informants' choices related to their organizations. In other words, interviews with EIs offer a unique opportunity to explore the microfoundations of the firms' strategy (Contractor et al., 2019; Foss and Pedersen, 2016) and to gain insights into how the highest level of the organization shapes the lower levels (Aguinis and Molina-Azorín, 2015). For instance, interviews with EIs can be used to explore the role of organizational narratives in enhancing or constraining new CEO or board-member decisions. In addition, interviews with EIs are also useful for exploring the microfoundations of differences between performers at the top and bottom in an industry, and investigating how those differences are interpreted and addressed by the executives.

Second, the interviewer can learn about an informant's analysis and perspectives on a particular issue, event, or situation. For example, Ostrander (1993) noted that some elite informants embrace the opportunity to have their say on certain issues, particularly regarding any public criticism they have received, thereby enriching the research with multiple points of view that would not be available otherwise.

In short, if the research domain and questions or hypotheses require either an in-depth understanding of the personalities and mindsets of elites or knowledge of an elite's analysis of a particular issue, interviewing EIs constitute an appropriate, and even necessary, methodological approach. For instance, without interviews with EIs we would have no information on what firms learn as they mature (Bingham and Eisenhardt, 2011), neither would we understand the importance of specific managerial choices in transferring complex knowledge from headquarters to firm subsidiaries successfully (Szulanski and Jensen, 2006), nor the role that heuristics play in shaping investments decisions under uncertain conditions (Maitland and Sammartino, 2015).

What is the best order for the interviews? In situations where the recruitment of EIs is highly successful, researchers face a decision on the order in which to conduct the interviews. Although the availability of participants is a significant factor in determining the order, if researchers have some choice our recommendation is to interview the informants most capable of challenging the researcher's assumptions and preconceptions first. Assumptions are thoughts that cause us to predict an outcome. Thus, challenging researchers' assumptions early in the study can create fresh thinking, thereby allowing the researcher to address novel emerging constructs or relationship between exiting constructs that have gone previously unnoticed. In scheduling the order of the interviews, it is, therefore, useful to first seek informants outside a researcher's direct networks. Indeed, while informants belonging to the personal researcher's network or the university alumni network are easier to access and can prove useful to build up confidence and refine the interview protocol, these same informants tend to be 'one's own kind of people' (Dexter, 1970, p. 39). They share similar mindsets with the researcher, posing the risk of relying too much and for too long on shared and, therefore, unchallenged assumptions. This issue is further amplified by the snowballing/referral approach that many researchers use to access additional EIs with similar characteristics, thereby further perpetuating the researcher's assumptions. So, by interviewing people outside of their networks early in the study, researchers are better positioned to challenge their own initial assumptions and preconceptions.

What is the right time in the research project to interview an EI? For studies that also entail collecting data from sources other than elites, we recommend conducting interviews with EIs during the later stage of the project. This approach is preferable for the following two reasons. First, as mentioned earlier and described later in our article in more detail, accessing elites is challenging. Researchers run the risk of long delays in securing an interview date and should plan accordingly.

Second, interviews with EIs conducted later in the research project will benefit from the researcher's improved command of the subject matter. Such preparation includes, but is not limited to, knowing the details of the topics under investigation and the history of the informants and their firms, familiarity with specific jargon, finding specific examples to support ideas, and covering all the basic information that can be found in existing records (Berry, 2002; Harvey, 2011; Huggins, 2014; Thuesen, 2011; Walford, 1994; Zuckerman, 1972). Additionally, thorough preparation helps address the status imbalance between the interviewer and informant mentioned earlier by highlighting the 'seriousness of the interviewer' (Zuckerman, 1972, p. 164) and projecting a 'positive image in order to gain their respect' (Harvey, 2011, p. 434). Being knowledgeable is important for researchers because it allows them to adapt their style to the EI. For instance, Pollitt et al. (1990, p. 184) commented that 'like many other interviewers, we have sometimes been awarded additional information simply because we have appeared to know more than we actually did.' Being knowledgeable pays off also when the researcher plays her role as unknowing and 'unthreatening' (Desmond, 2004, p. 265) because it allows to guide the interview in the desired direction.

Data Collection

How can researchers access EIs? SMEs reported that the most pervasive challenge in interviewing EIs is how to gain access to them in the first place (i.e., 78 per cent of SMEs mentioned this issue). Indeed, researchers should expect limited access to elites and a strong likelihood that access will be controlled by gatekeepers (Hertz and Imber, 1993; Laurila, 1997; Shenton and Hayter, 2004; Welch et al., 2002). For example, Thomas (1993) needed 'nearly two years of phone calls, screening meetings with executive assistants, and networking to interview two executives in a major manufacturing company' (p. 83).

To recruit EIs' effectively, SMEs framed their interview requests as a practical problem that would benefit the EIs or their firms. Similarly, Ostrander (1993) suggested telling gatekeepers how the interviewee would benefit from participating and being explicit about the boundaries of the project's outputs. Indeed, several SMEs convinced the gatekeeper and the informant that the project was going to offer value to them. This required preparing a proposal and asking questions that were broad enough to incorporate some of the informant's concerns about their business or industry, along with the researcher's goals.

The SMEs we surveyed used a combination of the following approaches to overcome the access challenge. First, they leveraged the university's alumni network and connections. Specifically, they relied on alumni information at their respective universities to find and contact suitable informants. Others asked high-level university administrators (e.g., Deans) to write an introduction letter for them. Overall, using academic credentials and institutional affiliations is useful to establish credibility in the eyes of the gatekeeper (Welch et al., 2002; Zuckerman, 1972).

Second, SMEs leveraged other types of networks. More experienced researchers relied on contacts developed during previous studies, while others preferred to leverage personal and friendship-related connections such as 'one of the authors of the study went to college with the son of one of the interviewed CEOs'. Another SME reported having 'as a student someone married to the CEO of a large venture capital'. Other researchers accessed EIs by including well-known consultants in the project.

Third, there are ways to bypass the gatekeepers. Some SMEs tried to email the EIs directly. For example, some did so using LinkedIn Premium and contacted their informants with personalized emails, with some success. Others exchanged participation in the study with leadership workshops, training events and, in one case, facilitating the evaluation of the board activities. One SME noted, 'The creation of an exclusive, selective event entices senior managers and makes them engage. And once they are in the room, they will speak and want to speak to you later, too!' and that 'Executives are also drawn by the idea of pairing with other people and can be surprisingly frank in the right context'. Another approach used to bypass the gatekeeper was 'walking up their interviewee'. These researchers started interviewing a large number of lower to mid-level managers to gain the credibility needed to convince the executives to meet them. A final approach used to bypass the gatekeepers consists of leveraging vertical relationships (e.g., client/supplier) between the university and its suppliers. Ryan and Lewer (2012) explained that the suppliers may speculate on the price they will pay in terms of public relations if they refuse.

Fourth, a few researchers have been able to fruitfully engage the gatekeeper. A SME shared that 'I would often work with the executive assistant (EA) of the CEO. I endeared myself to the EA, sometimes spending a bit more time to get to know them. On rare occasions, I would meet them in person to make the connection. If I was able to personally meet the EA, then they would become my advocate for this research. The EA would let me know the CEO schedule and they would follow up with information if I asked (in most cases)'. Another SME shared 'We followed up with executive assistants extensively, building personal connections where possible, to recruit the assistants to help us encourage participation'. Indeed, Harvey (2009) shared that once he satisfied all the inquiries of the gatekeeper, the latter subsequently contacted around 60 people for him. Clearly, gatekeepers can open doors to EIs as much as they can close them.

What is the best format for the interview? Accessibility to the informants and the time they are willing to dedicate to the researcher determines the type of interview approaches the researcher can use. If the informant can allocate a longer time to the interview or the EI can be accessed more than once, then the recommendation is to start with an unstructured format. Moreover, if the EI has limited time or can be interviewed only once, our recommendation is to approach the EI with a semi-structured format. Using the words of one of the SMEs: 'Because follow-up interviews were not always possible… we went in thinking that these interviews would be a "one-shot opportunity" and the authors prepared a detailed and flexible interview protocol'. This approach offers the chance to cover all relevant topics without restricting the conversation (Bernard, 2011). Finally, a semi-structured format conveys the message that the researchers are not trying to exercise excessive control (Bernard, 2011). In line with the desire to allow the EI to speak freely, but simultaneously needing to balance time constraints, 83 per cent of the SMEs we contacted used semi-structured interviews. The others used unstructured interviews or more structured interview approaches.

In addition, SMEs opting for a semi-structured interview reported that they preferred letting the EI speak freely. For example, as noted by one of the SMEs, 'I will let them say what they want to say, without interrupting them. However, sometimes they just go too far away and I need to bring them back to the main theme'. Another one reported: 'I kept the main questions to address during the interview in my notes to glance over them and check whether everything was covered during the interview'. Moreover, the SMEs opting for an unstructured approach 'did not lead the interviews', but 'let the informants talk about their experience, thoughts, and ideas on the broader topic of […]'. In both cases, the key for the researcher was to remain objective and assure that the responses of the informant were dependable and trustworthy, as discussed later in our article.

Finally, if closed-ended questions are indeed necessary, these should come at the end of the interview after a succession of open-ended ones (Rivera et al., 2002). The reason is that informants can become irritated if not given the chance to explain exactly what they mean (Schoenberger, 1991).

How should researchers manage power dynamics? As mentioned earlier and summarized in Table II, the power distribution is likely to favour the informant over the researcher (e.g., Dexter, 1970; Ostrander, 1993; Welch et al., 2002), a situation that can be intimidating for the interviewer. As 'professional communicators' (Fitz and Halpin, 1995, p. 68), elite informants may attempt to dominate the interview (Ostrander, 1993). Thomas (1993) noted that 'it is easy to be drawn in by the articulateness and, in some cases, by the charm of top executives without realizing it' (p. 89). The risk of underestimating the power imbalance involves getting caught in the 'hostage syndrome.' In such cases, researchers might suspend their own judgment in the face of an elite's display of power by 'overestimating the importance of what elites have to say' (Ostrander, 1993, p. 19).

First, there are formal and informal strategies for reducing this power imbalance and whether to leverage the power distance or to minimize it depends on the circumstance and on the EI. First, on the formal side, the researcher can seek endorsement from a prestigious organization as this will cast an aura of respectability on the interviewer. Regarding informal strategies, the researcher should be acquainted with the habits, styles of dress, and rituals of interaction that are typical among EIs being interviewed (Thomas, 1993).

Second, researchers should not shy away from asking sensitive questions because doing so challenges the researcher-informant power distribution. Asking such questions reduces the perceived status gap between the researcher and the elite informant (Ostrander, 1993). It is important to wait until rapport has been established and enough discussion has taken place before asking any contentious or critical questions (Richards, 1996). This caution is particularly relevant if researchers want to ask about potential mistakes the EI may have made. Moreover, asking potentially contentious questions can alienate the participant and lead to defensiveness. Before asking any threatening questions, it is important to know the jargon of the respondent so as to make the question clear and to be better informed than the EI when querying or challenging the elite's knowledge or point of view (Ostrander, 1993). Overall, Ostrander recommended 'stretching the bounds of etiquette' (p. 24), especially when the informant is starting to become uncomfortable. This can be done by advising the interviewee that a challenging question is coming, and by reminding that all answers will remain anonymous. Furthermore, the power position of EIs allows them to choose which questions to answer and enables them to restrict access to information they might hold exclusively. To reduce the chance of this happening, we recommend building up trust in advance, and to stick to the facts and ask and re-ask unanswered (or partially) answered questions in a number of ways as a means to improve the study's dependability.

Finally, researchers can be respectful, but also tactfully critical. Nonverbal cues can be used to establish authority. For instance, Empson (2017) filled a glass of water for her interviewees to signal that she was welcoming them in her space. Nonverbal cues such as raising an eyebrow or a quick wide-eyed glance are useful for maintaining control over the interview process and to show interest. Such cues can also convey that a deeper answer is needed and lead to elite informant clarifications without any verbal interruptions. These cues can also be useful in preventing the informant from talking too much (Ostrander, 1993).

How can researchers obtain more honest responses? EIs might be expressing an official company position rather than their own opinion (Harvey, 2010) and a common concern among the SMEs (i.e., 30 per cent mentioned this issue) is that EIs might 'prefer to talk about how things ought to be rather than sharing detailed accounts on the challenges encountered and their coping strategies'. Further, one of the SMEs shared that the challenge of obtaining honest responses is typical when interviewing EIs, but this is not such a salient challenge when interviewing senior managers just below the executives and executives who have retired or left the company.

The SMEs shared that their strategies to obtain honest responses are centred around two key and interrelated principles: *confidentiality* and *neutrality*. Confidentiality is made explicit in the formal written agreement with the EI, but also implicit in the researcher's behaviour during the interview. For example, not asking for specific names, focusing on the description of the issue, and not sharing what has been discussed during prior interviews are ways to communicate confidentiality. In the words of one of the SMEs, 'Sometimes interviewees test me and ask "To whom else have you talked?"… I typically reply "I am very sorry; I cannot tell you any names. We guarantee anonymity to all our respondents". Typically, the interviewees are very relaxed after getting this answer'.

Regarding neutrality about the informants' answers, it encourages EIs to open up. As one of our SMEs indicated, 'I showed that I could understand him and encouraged him to tell me more about it. He then opened up and told me his real attitude towards … and his firm's real approach to it'. When the informant remains elusive, SMEs suggested sticking 'to facts, ask and re-ask the questions in different ways, and make it clear that the data are collected for research purposes only'.

Some SMEs found it especially hard to discuss sensitive topics such as personal problems the EIs faced (e.g., being fired from an organization), retiring, and other issues related to reputation concerns. To put the EI at ease, SMEs opted to conduct the interview over dinner or during a walk after lunch 'as some felt less stressful talking about sensitive things out of their office', which has the additional benefit of optimizing the informant's busy schedule. Furthermore, when interviewing EIs in neutral spaces 'they talked more freely' (Elwood and Martin, 2000, p. 655).

How should researchers engage EIs? The SMEs implemented several useful solutions to address the challenge of keeping their informants engaged. Three basic principles mentioned by the SMEs are the following: (1) *relevance*: 'better … to ask questions that are both relevant to his/her recent concerns and bring a new perspective to him/her' to keep the respondent interested; (2) *being non-threatening*: 'you have to conduct the interview in a non-threatening way'; and (c) *adaptability*: this principle 'involves not sticking too closely to your pre-assigned questions, going with the flow of what they are talking about, making it into a really interesting conversation'.

Regarding relevance, one SME empathized 'with the interviewee during the interview, imagining being in his/her shoes' as the feeling of ease is important not only in generating informative responses but also in increasing the likelihood that EIs will provide referrals for additional interviews (Harvey, 2011). More seasoned researchers are able to enhance relevance by incorporating an intellectual debate in the interviews. For example, one SME noted that 'There is an art to interviewing executives. It involves not sticking too closely to your pre-assigned questions, going with the flow of what they are talking about, making it into a really interesting conversation'. Regarding being non-threatening, some SMEs found it useful to position themselves as learners. For example, an SME noted that 'As a junior scholar, I sometimes positioned myself as a learner'. Indeed, Stephens (2007) found it fruitful to mimic the supervisor/Ph.D. student relationship in his research and Laurila (1997) showed how an EI's vanity can be used to the researcher's advantage by 'emphasizing that they now have a chance to teach the researcher, who is the student in their discipline' (p. 411). Regarding adaptability, McDowell (1998) found herself 'playing dumb' with older patriarchal figures, being 'brusquely efficient' with fierce older women, 'sisterly' with women of the same age holding similar positions and 'superfast and well-informed' with younger men.

Finally, EIs occasionally give short or shallow responses. The SMEs used several techniques to make the informant elaborate on their answers. These techniques included eye glimpses, asking about hypothetical situations, and re-asking the question in a different way. The use of nonverbal clues is useful to convey interest, also expressing the need for deepening the answer, and for clarification without directly interrupting the informant (Ostrander, 1993). Hypothetical situations are imaginary but realistic cases, and the interviewer should ask the informant to describe or comment on how they would act in such a situation (Smigel, 1958).

Should researchers conduct remote interviewing? When face-to-face interviewing is not an option, the researcher can conduct the interview remotely (e.g., using Skype or FaceTime). For example, a researcher could find that a CEO is unwilling to grant a face-to-face interview but might agree to a phone interview on the way to the airport (Undheim, 2003).

Remote interviews are effective, are far from being a second-best option to in-person interviews, and in fact can offer some advantages (Holt, 2010; Stephens, 2007). First, because remote interviews are not limited by geography, they help increase participation. In general, EIs seem to appreciate the flexibility of a remote interview (Stephens, 2007). Second, in the particular case of phone interviews, the lack of visual contact can help reduce bias due to the similarity effect, as visual clues are removed. For example, Stephens (2007) reported that he benefited from using phone interviews because this reduced the informant's perception of the wide researcher-informant age gap, thereby disguising a factor that might otherwise have hurt the researcher's credibility (Odendah and Shaw, 2002). While phone interviewing offers flexibility, it also limits access to nonverbal clues. Depending on the research question and the scope of the study, this limitation could severely impact the quality of the research. Accordingly, video interviewing is a preferable option.

How should researchers conclude the interview? Ending an interview is an important component of the process. The recommendation is to do so with an open-ended discussion, which is also useful for verifying the completeness of the information acquired (Healey and Rawlinson, 1993; Richards, 1996). Typical questions to conclude the interview are the following: 'Is there anything else you would like to share?' Or 'Are there any issues that you think are important that we did not cover?'. The EI may reveal new relevant information that was not covered in the previous answers, or add additional insights to a previous answer. Additionally, it is good practice to ask the informant for potential referrals at this time (Thomas, 1993) and describe how the EI will be kept informed and when he/she can expected to hear back from the researcher on the results of the study.

One SME reported that she used the end of the interview to set up the conditions for a follow-up interview by asking if she could come back later with the summary of findings to ask follow-up questions. Overall, ending the interview should set up expectations about the post-interview process, because this post-interview contact can be used to leave a positive impression, thereby facilitating further research (Healey and Rawlinson, 1993). Additionally, it can be used to remind informants about any documents they promised to share check on the accuracy and authenticate the transcript (Richards, 1996; Thomas, 1993; Welch et al., 2002).

How can researchers secure follow-up interviews? Obtaining a follow-up interview with an EI can be very difficult. Only a few SMEs shared that they were able to obtain follow-up interviews. As part of the post-interview follow-up protocol, some of the SMEs prepared short presentations of their findings and related topics and offered to share these presentations at a follow-up meeting. Others conducted the follow-up using other means, such as emails or phone interviews, to deal with the issues that they could not cover during the interview because of lack of time.

Other SMEs shared that they regularly send thank-you notes, and maintain contact with the informant several times per year to 'check on different issues and schedule additional interviews'. As one of the SMEs suggested, 'Getting repeat conversations with them is really a function of […] if the topic is interesting, and if you did a decent job of engaging with them last time [then] they will meet you again as long as it is not too often'.

How can researchers improve the trustworthiness of the resulting scholarly paper? Credibility and dependability are necessary criteria for achieving trustworthiness in qualitative research (Lincoln and Guba, 1985). In this section, we address these issues in the specific context of EI interviewing as well as why it is useful to seek disconfirming cases.

How can researchers improve the credibility and dependability of the study?
Credibility is the degree of confidence in the findings and in the researchers' interpretations (Gill et al., 2018; Ulin et al., 2012). Dependability is the degree to which the research process is clearly explained and carried out in line with the rules and conventions of the chosen methodology (Gill et al., 2018; Ulin et al., 2012), as well as whether the results are stable over time and under different conditions (Elo et al., 2014; Gill, et al., 2018; Given, 2008; Seale, 2002).

From the responses of the SMEs, a particular concern directly related to credibility is informant bias. Indeed, as noted by an SME, 'There is always something the interviewed person wants to get across. Some axe to grind. Or some insights about what went wrong. Or some credit what they [the EIs] want. Or they imagine it is their only chance to be in a history book. You never know whether it [the answer] is biased'. Other SMEs noted that EIs 'might seek to manipulate me to write an article in their favor' or 'the most senior leaders tended to tell the story as being very much about them, while others had different recollections'. In addition, EIs generally do not like talking about company failures and, in such instances, they may express the official company position rather than their own personal opinion (Harvey, 2010). Given that these issues can threaten credibility and dependability, we offer the following recommendations.

Regarding how to address the credibility challenge, a most commonly adopted strategy is the use of multiple sources to cross-check the same information – what is usually referred to as triangulation (e.g., Hoffmann, 2007; Inkpen, 2008). The SMEs used several complementary strategies to triangulate the answers they received. Some asked for company data and files which 'typically hint at what else was going on concurrently and reduce the chance of staying blinkered'. Others sought confirmation from lower-level managers as 'they often have an important alternative view.' When data provided by the firm directly or by the EIs are not available, researchers can rely on archival records, public news, company documents and personal histories (Hoffmann, 2007).

Regarding the dependability challenge, this is usually addressed by first conceptualizing this issue as within-respondent and between-respondent dependability. First, in quantitative research, within-respondent dependability is addressed using multi-item scales and estimating reliability (e.g., Cronbach's alpha) by asking multiple questions for each construct (Aguinis et al., 2001). However, asking multiple questions on the same subject in EI research is not advisable because it gives the impression that the interviewer might not have understood the previous answer, and it diminishes the credibility of the researcher (King, 1998). To assess within-respondent dependability, Berry (2002) recommended asking the informants to comment on their own situations with questions such as 'Why did [the *Wall Street Journal*] disagree with you?'. Using third parties to challenge the informant's view moves them away from their own perspective without demonstrating a researcher's personal scepticism and also shows the interviewer's deep knowledge of the topic. Furthermore, it is useful to embed questions aimed at disconfirming or restating previous answers (Seidler, 1974). For example, when interviewing an EI about the stakeholders' engagement, dependability can be assessed by inquiring about the shareholders' engagement to assess whether the EI's answers are in line with each other. Second, addressing between-respondent dependability in quantitative research involves estimating reliability across respondents by computing indexes of inter-rater reliability such as Cohen's Kappa (Aguinis, et al., 2001). In the context of EI interviewing, SMEs asked 'informants to facilitate contact even to non-preferred colleagues' and interviewed people from rival companies or customers. The degree of agreement across informants serves as evidence of dependability, similar to the assessment of inter-rater reliability in quantitative research (LeBreton and Senter, 2008). But, a lack of between-respondent dependability can offer opportunities for additional theory development (Fisher and Aguinis, 2017).

Should researchers seek disconfirming cases?

When theoretical or purposive samples were not accessible, most of the SMEs in our study (i.e., 76 per cent) relied on snowball and convenience samples. As noted earlier, these sampling approaches likely result in EIs from a population of similar-minded people. The risk for the researchers is that they will find similar patterns in the data, quickly reaching theoretical saturation. On a related note, researchers using purposive or theoretical sampling approaches seek informants that could help better define the emergent patterns in the data. As the access to EIs is often restricted, these researchers might have to access 'second best' informants. Once the patterns in the data have been clarified and researchers have reached theoretical saturation, they will stop the data collection, causing their findings to possibly support biased results based on limited and homogenous information.

To address the aforementioned challenges, we recommend seeking out 'disconfirming cases' – informants from different organizational conditions, statuses, and industries, and whose views on the phenomenon under investigation may differ from those of other EIs. Disconfirming cases are those that do not necessarily fit emergent patterns (Patton, 1990) and serve to test the boundaries of the research. The general principle is the following: 'If you think your results are not generalizable or the existence of a particular kind of case will undermine all that you "know" to be true about a phenomenon, then look for that kind of case' (Palys, 2008, p. 698). Disconfirming cases should be searched, especially after theoretical saturation has been reached if the researchers aim to generalize their findings and particularly in the presence of snowball or convenience samples because they are helpful for assessing the transferability of the study (Lincoln and Guba, 1985).

Reporting of Results

The act of reporting results of interviews with EIs obviously involves information included in the resulting scholarly manuscript. But, this issue also involves what should be reported back to the EIs. We address these topics next.

What information should researchers report and to whom? Aguinis and Solarino (2019) offered 12 transparency criteria about qualitative research that also included detailed recommendations on what to report in the resulting scholarly manuscript. However, one issue that is particularly important regarding EI interviews, which was not addressed by Aguinis and Solarino, is how to report direct statements. A challenge faced when reporting the interviews with EIs in a scholarly manuscript is how to convey the context of quotes without violating confidentiality. Krause et al. (2019) offered examples of how researchers should report quotations from their informants. Specifically, their quotations are preceded by 'the basic scene', which describes where and under what circumstances the quotation was spoken.

In addition, researchers should also set up expectations early in the process of interacting with EIs on what will be shared and when. The SMEs provided the following recommendations on complementary reporting strategies, all of which aim to provide value back to the informant. First, SMEs prepared short presentations of their findings with illustrative graphs and figures or a report framing results in non-academic terms. One SME noted, 'Sometimes they [the EIs] asked whether they could publish our findings in their internal journals, and we had to keep them patient'. Second, and as a solution to avoid such a problem, SMEs prepared practitioner reports that were mostly descriptive and focused on best practices for the EIs. Finally, the SMEs suggested that researchers should keep the informants updated as the manuscript develops from its first draft to its final publication.

EI INTERVIEWING: FUTURE METHODOLOGICAL RESEARCH DIRECTIONS

Although our article offered recommendations based on the existing literature and advice provided by subject matter experts, there are additional challenges and questions that could be addressed by future research. First, a potential avenue for expanding the literature on EI interviewing is to examine how power structures across countries and cultures affect not only access to EIs, but also the actual interview dynamics. While the literature on cross-cultural studies is well developed (e.g., Bond, 1996; Smith et al., 2008), it has not yet been extended to EIs. Few studies provide details on the differences in contexts and power structures. Bygnes (2008) is one exception. When comparing elites in Norway and France, she was forced to adjust her approach in conducting interviews to match the culture of the local elite. Other researchers have described the advantages and challenges foreign researchers face when trying to interview local elites in emerging countries such as Russia (Richardson, 2014; White et al., 1996), Eastern Europe (Mikecz, 2012), Hong Kong (Yeung, 1995) and Cameroon (Morse, 2018). Moreover, researchers found that elites responded differently to fellow compatriots than to foreign researchers. The latter are more trusted because they are not perceived as posing any threat to the informant's status or position (Mikecz, 2012; Yeung, 1995), and are in a unique position to benefit from the presence of a cultural gap which provides unique insights not noticeable to local researchers (Welch et al., 2002).

In addition, another direction for future research involves the potential adaptation of existing group interviewing techniques to the context of EIs. Indeed, the creation of exclusive events and board evaluation initiatives are useful ways to gain access to groups of EIs. A well-known technique is that of the focus group, which brings together a group of people to discuss a specific issue. The difference between focus groups and interviews lies in the explicit use of group interaction to generate data (Kitzinger and Barbour, 1999). While this practice is common in marketing research, it could potentially be applied to EIs as well to deepen the discussion of key topics. Such focus groups could be useful in discussing how organizations deal with sensitive topics such as how to change inappropriate company cultures (e.g., as in the case of Uber and WeWork) and other sensitive issues (e.g., harassment). Again, future research can assess the potential viability and effectiveness of adapting existing group-based interview techniques to groups of EIs.

CONCLUDING REMARKS

EI interviewing has been used in numerous theories and domains in management studies. But, EI interviewing demands a great deal of the researcher's time, effort, and often financial resources as well. Based on a comprehensive and multidisciplinary literature review as well as information provided by subject matter experts, our article synthesized challenges and best-practice recommendations on how to design and conduct empirical research using interviews with EIs. We hope our recommendations will serve as a catalyst for improving the usefulness, quality, and ease of future research using EI interviewing in management studies and related fields.

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NOTE

[1] The Institutional Review Board at The George Washington University approved our study (Protocol NCR202101; Title: "Best Practices in Interviewing Elite Informants"). Our study was judged to be exempt from institutional review board review under United States Department of Health and Human Services regulatory Category 2.

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APPENDIX A

Sources Used in Literature Review Including Best-practice Recommendations for Designing and Conducting Interviews with Elite Informants

(*) are the studies that were subsequently excluded from the literature because they did not address business elite informants specifically

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