

[TEMPLATE] Interview Synthesis Memo Template

GOAL

Decision-makers have extremely limited time and bandwidth. Prepare your interview synthesis memo to frontload important information and make clear why it matters. Use appendices for related research, data, and anticipated Q&A.

FORMAT

Your memo should include:

- Brief context
- Who you spoke with / what they do
- Your reflections, consisting of:
 - General synthesis of what you learned
 - Notable or unexpected themes, patterns, or divergences in subjects' responses
 - Particularly revealing comment or observation shared with you
 - Any other relevant insights
- Your assessment of the most critical takeaway and recommendations on strategy

TEMPLATE

- [Executive summary](#): 1 page
- [Memo](#): 3 pages
- Appendices: 7-10 pages (screenshots, charts, tables, graphs, research, transcript excerpts, etc)

[TEMPLATE] Executive Summary

MEMO

TO [Name, Title]
FROM [Name, Title]
RE [Subject]
DATE [Date]

Executive Summary (who you interviewed; key themes; why significant)
(3 paragraphs max; no more than 3 lines and/or bullets per paragraph)

MEMO TEMPLATE

3 pages max. Embrace white space / bulleted lists / visuals.

REQUIRED SECTIONS

MEMO

Title

(Clearest, simplest statement of what this memo's about)

Context

(Why topic matters; why interview subjects selected to speak on this topic; when / where interviews conducted)

Key themes

(Synthesis of major themes ACROSS interviews; do not list each interview readout in separate sections; identification of where interview subjects' perspectives and experiences aligned and diverged)

Personal assessment

(Your own assessment of the themes from section above; any surprising or unexpected findings; relevant context to help reader understand how you arrived at your assessment)

Stakeholders

(Who else could benefit from reading this memo)

Stakeholder Considerations

(Any sensitivities about information in the memo that should be redacted or reframed for stakeholders listed above)

Next steps

(Based on this experience, themes identified, your assessment, and potential stakeholders, what you would recommend to readers to learn more or take action)