Stakeholder Interview Template

Title - Channel
STAKEHOLDER INTERVIEW
DATE/TIME

BEFORE CALL:
*See if you can get them to do video call

*See if you can get them in a private place

*Make sure you have a note taker….

*Send along the important questions, not all, so they feel comfortable with entering the interview

*Keep it informal

DURING CALL:
*Ask for clarification when you don't understand something

Hi, my name is _____, I'm a user experience designer and I'm part of an internal team created to improve the experience of Caliber's digital products. When we start a new project, we like to take the time to get to know the folks that will influence the final product. We're trying to better understand how you define success for this project and listen for any potential challenges we should know about up front.

I have a handful of questions I'd like to ask you in the next 30 minutes. Please feel free to be totally frank. I'm talking to people across department and grouping answers together rather than focus on what one person said, If I use a direct quote we will not attribute it to you personally.

Warm up questions:
1. How long have you been in this role?

2. What are you responsible for? What do you own?
3. What does a typical day look like?
4. What people or teams do you work most closely with? How is that?

Project questions:
1. In your words, what are we trying to accomplish with this project?

2. How do you feel about the [project] we're about to work on?

3. Here are all the user roles we are aware of? Is there role or department we are missing?
    - Retail LO
    - DTC LC
    - Production Assistant
    - QC Specialist (?)
    - Underwriter
    - Processor
    - Registration Analyst
    - Funder
    - CRM – What is this

4. What business outcomes/goals are we targeting?

5. In your opinion, what are the best aspects or features in H20? Why?

6. How will we know that we've succeeded? What does success look like to you?

7. What will be critical to achieving that success?

8. If you could change anything about H20 today, what would it be?

9. Are there any roadblocks or challenges that you think might get in the way?

10. Is there something that you learned from a previous project at Caliber that we could apply to this one?

11. From your perspective, what must we 'get right' with this project?

12. Is it ok if I reach out with any additional questions?

Note: Set expectation of check-ins/ updates with this person