

Company Name

Interview Guide | Month DD, Year

Purpose

This document was created to speed up the process of planning a semi-structured interview. Use it to get client buy-in on your approach and give them an opportunity to add their own questions.

How to use

1. Make a copy of this document
2. Move document to the desired project folder
3. Keep sections that are relevant to the project
4. Change all the purple text to match the project details
5. Remove all pink text
6. Delete this page

Attendees

Place participants and moderators here

First, Last

Role

Company

Digitalist

First Last - Role

First Last - Role

Goals

Place goals of the interview here. Some sample goals are written typical to an interview but please re-write to match the research.

- Get the role's perspective on the quality of the current service delivery
- Understand the role's contribution to the customer experience
- Understand the customer experience from the role's perspective
- Identify improvement opportunities

Introduction (5 minutes)

This blurb is what you say in the beginning to introduce the stakeholder to the project and why you are talking with them today.

Thanks for taking the time to chat with us. We are Digitalist, a creative technology agency hired by [Client] to understand various points of views and experiences related and affecting the current experience. To do that, we are talking with various departments and customers to get the full picture of what's happening. Which is why you are here today. As a result of this work we are not only bringing recommendations on how we can enhance customer experience, but we will create [deliverables]..

For this particular chat, we want to better understand [specific goal paraphrased]. We want to better understand your experience with [client]. We'll chat about things you like about them, things that may have been difficult, and explore ways to make the service better for you.

We will also be recording this conversation so we can study it in more detail and do the appropriate follow up work on anything specific you may mention. We have prepared this consent form to outline how we will keep this data private and confidential. We may show you concepts or prototypes that aim to improve the experience. While in the early phase, we ask that you keep those concepts confidential until they are validated and approved to move forward. This is also in the consent form.

Also, if you feel comfortable doing so, we may ask to record a short video highlighting the key points of our conversation. This helps us remember our conversation more quickly and ramp up our other team members who couldn't be here today.

Do you have any questions before we begin?

Are you okay with being recorded?

[\[Sign Consent Form\]](#)

Questions (45 minutes)

Interviews are typically semi-structured and can change pending on what is uncovered during the conversation. These questions are written as guidelines to help keep the conversation going and help the facilitator cover the necessary topics to meet the goals of the research.

There are placeholder questions written below but **please replace them with questions that support the research.**

Typically, questions are grouped by an overarching topic. Typically it's best not to go over 7 topics in an hour-long interview.

1. To begin, please introduce yourself and your role within [\[company\]](#)
 - How big is your organization? How many customers do you serve?
 - What responsibilities do you have as it relates [\[context\]](#)?
 - What tools do you use to facilitate this?

2. Let's think back to when [\[recent scenario where service was used\]](#).
 - a. What caused the need for a new [\[product/service\]](#)?
 - b. Which options were you considering?
 - c. What made [\[client brand\]](#) the final choice?
 - d. How long have you been with them now?

3. Walk us through your experience [\[signing up to service/brand\]](#)?

- a. What did you have to do?
 - b. Did anything strike you as well done?
 - c. Was there anything that was frustrating or confusing?
 - d. If you were to do it again, is there anything you would change?
4. How has the experience been like post sign up?
- a. How do you feel about the overall experience?
 - b. Do you have any common questions or comments about your service?
 - c. How well do you understand your service?
 - d. How do you find managing your account like changing information or services provided?
5. Let's talk about your relationship with [\[client/brand\]](#)
- a. How many people do you work with to manage your account?
 - b. What do you use [\[client/service\]](#) for?
 - c. How does this relate to other services you use?
 - d. How has your experience with [\[tool/product\]](#) been like?
 - e. [If replacing a carrier] How do you find them in comparison to your previous provider?
6. If there's anything you could change to make the service better for you, what would it be?

Debrief (10 minutes)

Thanks again for making the time to chat with us.

Before we let you go, do you have any final questions or comments for us?

[\[Record summary video\]](#)

[\[Hand out incentive\]](#)