

Preparing for the Interview (1 of 2)

Before

- Establish the objective for the interview.
- Determine correct user(s) to be involved.
- Determine project team members to participate.
- Build a list of questions and issues to be discussed.
- Review related documents and materials.
- Set the time and location.
- Inform all participants of objective, time, and locations.

During

- Arrive on time.
- Look for exception and error conditions.
- Probe for details.
- Take thorough notes.
- Identify and document unanswered items or open questions.

Preparing for the Interview (2 of 2)

After

- Review notes for accuracy, completeness, and understanding.
- Transfer information to appropriate models and documents.
- Identify areas needing further clarification.
- Thank the participants.
- Follow up on open and unanswered questions.

Interview Session Agenda (1 of 2)

Discussion and Interview Agenda

Setting

Objective of Interview

Determine processing rules for sales commission rates

Date, Time, and Location

April 21, 2016, at 9:00 a.m. in William McDougal's office

User Participants (names and titles/positions)

*William McDougal, vice president of marketing and sales,
and several of his staff*

Project Team Participants

Mary Ellen Green and Jim Williams

Interview Session Agenda (2 of 2)

Interview/Discussion

1. *Who is eligible for sales commissions?*
2. *What is the basis for commissions? What rates are paid?*
3. *How is commission for returns handled?*
4. *Are there special incentives? Contests? Programs based on time?*
5. *Is there a variable scale for commissions? Are there quotas?*
6. *What are the exceptions?*

Follow-Up

Important decisions or answers to questions

See attached write-up on commission policies

Open items not resolved with assignments for solution

See Item numbers 2 and 3 on open items list

Date and time of next meeting or follow-up session

April 28, 2016, at 9:00 a.m.

Keeping an Open Items List

ID	Issue title	Date identified	Target end date	Responsible project person	User contact	Comments
1	Partial shipments	6-12-2016	7-15-2016	Jim Williams	Jason Nadold	Ship partials or wait for full shipment?
2	Returns and commissions	7-01-2016	9-01-2016	Jim Williams	William McDougal	Are commissions recouped on returns?
3	Extra commissions	7-01-2016	8-01-2016	Mary Ellen Green	William McDougal	How to handle commissions on special promotions?