

UX APPRENTICE

Stakeholder Interview Template

You may also [download this template in Microsoft Word format](#).

PROJECT VISION

- What is your vision for this offering?
- What defines success for this project?
- What are the potential pitfalls (i.e. what keeps you up at night about this project)?

USERS

- Different types of users (salesperson vs supervisor vs analyst)
- Who is primary?
- Role(s)?
- Typical Background?
- Defining Attribute?

VALUE PROPOSITION

- What problems do users have that this offering solves?
- What is the core value prop of the offering?
- What are the main marketing messages?

COMPETITION

- What similar tools are in use today?
- Target Market? Value Proposition?
- What are their relative strengths/weaknesses?
- How is this offering different?

YOUR CUSTOMERS

- Target market(s)?
- What role is your team selling to?
- What problem do they have that your offering solves?
- Who is their competition?
- How are they differentiated?

PROCESS & WORKFLOW (example questions here for a Salesperson role)

- What is the nature between the salesperson and their customer?
- How does the salesperson know when it is time to engage with a customer? Are there multiple types of engagements? Are there other key patterns (e.g. cyclical patterns, size of company, level of customer savvy-ness, industry, etc).
- How do they prepare? Who do they work with? What tools do they use?
- How do they engage? What is the first step? And the next (and so on)? How does the engagement end?
- What frustrations/ pain points do they experience with their current process?

CONTEXT OF USE

- What tools do they use today? Where do those tools fit? (collect screenshots, printouts, any relevant articles if possible)
- What data points do they collect today? What insight are they able to share with customers today? How do they share it? What does it look like?
- What's missing in the current process that this tool will provide?
- Where do you imagine your new (or redesigned) offering will fit?

USER GOALS

- What defines success? (if an experience goes well, what happens, commission? bonus?)
- What are bad results? (If an experience doesn't go well, what happens?)
- If users had a "magic wand" and could wish for anything to make the process better, what would they wish for?



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