# Stakeholder Interview Template

PROJECT VISION

* What is your vision for this offering?
* What defines success for this project?
* What are the potential pitfalls (ie. 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 *their* 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 their multiple types of engagements? Are there other key patterns (eg. cyclical patterns, size of company, level of customer savy-ness, industry, etc)
* How do they prepare? How 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 is a 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?