

Interview Template

Name of study or project: _____

Name of individual: _____ Date: _____

Learning objectives

What are the specific questions, behaviors, or attitudes you're trying to understand from this interview? This will help guide the types of questions you decide to ask in the interview.

Sample learning objectives

- What role does this user play at their company?
- What does the workflow of that role look like day-to-day?
- What are the problems faced by that role?
- What is the severity of those problems?
- What causes those problems?
- What constraints are playing a factor?
- What are they trying to do to solve these problems?
- Is this user actively seeking a solution?
- Is this user satisfied with any available solutions?
- Does this user have a budget already set aside for solving this problem?
- How does this user (or his/her boss) measure success in his/her role?

Introduction (2-5 minutes)

Thanks for speaking with me today! We are constantly trying to learn, and your candid feedback is extremely helpful for us.

This is going to be super informal. I'm going to ask you several questions, but I'm just here to have a conversation with you. There are no right or wrong answers, and I'm not looking for you to say anything in particular—so please be as honest as possible.

Do you have any time constraints I should be aware of?

OK, let's get started. If at any point you need to take a break or leave the room, just let me know and you can absolutely do so.

Do you have any questions before we begin?

Warm-up questions

These questions are intended to help start a comfortable, free-flowing conversation. This part of the interview is simply for building rapport and possibly verifying some basic demographic information, such as the individual's employer and role within the company. Smile, have fun, and do your best to make the individual comfortable talking with you!

Sample warm-up questions

- How long have you lived in [city]?
- Who is your current employer?
- What is your current role at [employer]?

Discovery questions

This part of the interview is intended to get to the core of your learning objectives above. Be sure to build your "intensity arc" here by asking some simpler questions first before getting into the more intensive, thoughtful questions.

If something is unclear, use one of the bottom questions to ask the individual to clarify. If the individual starts talking down a path you were not expecting or that is giving you good information, feel free to stray from the script to follow that line of thinking before asking more of your planned questions!

Sample discovery questions

- On a day to day basis, what are your three biggest problems?
- What causes [problem]?
- As a [role], what are your biggest problems at work?
- As a [role], what are your biggest headaches at work?
- What would your coworkers describe as their biggest problems?
- What causes [problem]?
- Walk me through your current workflow as a [role].
- If you could wave a magic wand and change something about your role, what would it be?
- What would your coworkers want to change about their workflow?
- How do you do [specific process] today?
- What is the most frustrating part of [specific process]?
- What would your coworkers say is the most frustrating part of [specific process]?

- What do you wish you could do with [part of workflow or specific tool] that you can't today?
- What are you doing to try and solve that problem today?
- How satisfied are you with existing solutions?
- How valuable would a solution be to you?
- How do you know you've had a successful day/month/year?

Always feel free to ask for clarity.

- Can you repeat that?
- Can you say that another way?
- Can you tell me more about that?
- Can you give me an example?
- Why?
- How so?

Cool-down questions

You've asked the questions you wanted and gotten to the core of your learning objectives for this conversation. Finish the interview out by asking some final, easy questions. This is the tail end of your "intensity arc" and gives you an opportunity to ask for any follow up that may arise.

Sample cool-down questions

- Is there anything I didn't ask that you wish I would have?
- Anything else?
- Can I follow up with you?
- What is the best email address or phone number to reach you?
- Anything exciting planned for the weekend?

Closing (2–5 minutes)

Thank you so much for your time; this has been incredibly helpful for me. Can I repeat back some of the main points, and see if that sounds right?

[Listing of main points / takeaways to give an opportunity for clarification or additions]

[If they agreed for follow up] I will follow up with you after my team and I have had a chance to look over your input. If we have any questions, I'd love to circle back with you. Otherwise, that's all I need from you today.

Thanks so much for your time and input!

NOTE: If you offered interview participants an incentive to participate such as a gift card, cash, check, or anything else, provide that incentive here at the very end of the interview.