

Stakeholder Interview Emails

5 ready-to-use email templates for your discovery process

Initial Introduction & Scheduling

First outreach to a stakeholder to introduce the project and request an interview time.

Subject: Request for Interview: [PROJECT_NAME] Discovery Phase

Dear [STAKEHOLDER_NAME],

I hope this email finds you well. My name is [YOUR_NAME], and I am part of the consulting team currently partnered with your organization on [PROJECT_NAME].

We are presently in the initial discovery phase, focused on gathering a comprehensive understanding of the current landscape, challenges, and opportunities facing the organization. Given your leadership and specific expertise in [Stakeholder's Department or Function], your perspective is incredibly valuable to our assessment. We are conducting a series of focused interviews with key stakeholders, and I would greatly appreciate the opportunity to speak with you for approximately [DURATION - e.g., 45-60 minutes].

We want to understand your view on current operations and your vision for success regarding this initiative. Could you please let us know your availability over the next week to connect? Alternatively, feel free to book a slot that suits your schedule using this link: [SCHEDULING_LINK].

We look forward to your insights.

Best regards,

[YOUR_NAME]

Pre-Interview Prep

Sent 2 days before the interview to set expectations, share the agenda, and reduce anxiety.

Subject: Preparing for our [PROJECT_NAME] interview on [DATE]

Dear [STAKEHOLDER_NAME],

I am looking forward to our scheduled conversation on [DATE] at [TIME] regarding the [PROJECT_NAME] initiative. To help you prepare and make the best use of our time together, I wanted to share a high-level overview of what we plan to cover.

The primary goal of this interview is to understand your specific perspective on the current state of affairs and future aspirations related to [Briefly describe scope]. There is no need to prepare formal presentations or review intensive data beforehand; we are primarily interested in your candid experiences

and top-of-mind thoughts.

We will broadly touch upon: 1. Current strengths and critical pain points within your area. 2. Cross-functional dependencies and challenges you face. 3. Your criteria for success for this upcoming project transformation.

As a reminder, this conversation is confidential, and insights will be aggregated anonymously in our final findings. We look forward to speaking with you soon.

Warm regards,

[YOUR_NAME]

Day-Of Reminder

Sent the morning of the interview to ensure attendance and confirm logistics.

Subject: Reminder: Interview today at [TIME] re: [PROJECT_NAME]

Dear [STAKEHOLDER_NAME],

This is a quick reminder regarding our scheduled stakeholder interview taking place today at [TIME].

We know your schedule is incredibly busy, and we genuinely appreciate you carving out this time to support the discovery phase of [PROJECT_NAME]. As mentioned in our previous correspondence, our goal today is to gather your candid insights regarding current operations and future opportunities. Your feedback will directly shape the strategic direction of our engagement.

Please double-check that you have the correct dial-in details or video conferencing link handy, which should be located in the original calendar invitation. If any urgent conflicts have arisen today that prevent you from attending, please do not hesitate to let me know as soon as possible, and we will do our best to accommodate a reschedule.

Otherwise, I look forward to connecting with you shortly.

Best regards,

[YOUR_NAME]

Thank You & Follow-Up

Sent immediately post-interview to show appreciation and reiterate the synthesis process.

Subject: Thank you / Follow-up on [PROJECT_NAME] interview

Dear [STAKEHOLDER_NAME],

Thank you very much for taking the time to speak with me earlier today regarding [PROJECT_NAME]. Our conversation was extremely productive and provided several key insights that will be valuable to our ongoing analysis.

In particular, your perspective on [Mention 1-2 generic points touched upon, e.g., specific operational bottlenecks or cultural considerations] was very illuminating and will help frame our approach. As next steps, we will be synthesizing the notes from our discussion along with the other stakeholder interviews we are conducting over the coming [Timeframe, e.g., two weeks]. As promised, individual comments will remain confidential and will be presented only as aggregated themes to leadership.

If any additional thoughts occur to you in the meantime, or if there are documents you mentioned sharing that you haven't yet sent, please feel free to reply directly to this email.

Thank you again for your engagement with this initiative.

Kind regards,

[YOUR_NAME]

Summary Share-Back (Validation)

Sent toward the end of discovery to validate high-level themes before finalizing reports.

Subject: Validation Request: Emerging Themes from [PROJECT_NAME] Discovery

Dear [STAKEHOLDER_NAME],

Following the conclusion of our initial stakeholder interview round for [PROJECT_NAME], our consulting team has synthesized the comprehensive qualitative data into preliminary themes. We want to ensure these findings accurately reflect the collective sentiment before we move into the final analysis and solution design phase.

Attached to this email, please find a high-level summary document outlining the key opportunities, challenges, and strategic priorities identified during our discussions across the organization. We would greatly value your quick review of these themes to validate if they resonate with your own experience and perspective.

Are there any critical nuances we missed? Do these themes accurately capture the current landscape as you see it? We request that you provide any feedback or red flags by EOD [DATE] so we can incorporate it into the final Discovery Report scheduled for presentation next week.

Thank you once again for your continued collaboration.

Best regards,

[YOUR_NAME]

Want to automate this?

FlowForge uses AI to conduct stakeholder interviews and synthesize findings automatically.

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