## **Interview objectives**

## The Office of XXXXX is leading a qualitative research project to better understand tXXXXXX

**Goals**

The [Office or team name] will be conducting [TECHNIQUES] with [AUDIENCE] to better understand [GOALS, PROBLEM OR OPPORTUNITY STATEMENT]. This research will support the following [agency / division / office] goals:

1. X
2. Y
3. X.

## **Interview structure at a glance**

* Welcome and disclosures (X minutes)
* Overview and set expectations (X minute)
* In-depth topic-based discussion (X minutes)
* Wrap-up and conclusion (X minutes)

## **Welcome and disclosures (5 minutes)**

**Introductions**

Welcome and thank you for joining me today. My name is [**Moderator name**] and I will be moderating this session. (I have a few colleagues with me who will be observing, taking notes, and may occasionally chime in with additional questions.)

I am here on behalf of [AGENCY NAME].. It [list agency mission]

Before we proceed further, I need to confirm that you meet all of the following criteria:

* X
* Y
* Z

*If participant does not meet the criteria:*

Unfortunately, since you do not meet the criteria to participate in this study, we will conclude this session.

*If participant does meet the criteria:*

Thank you. Let’s move on to a few housekeeping items.

**Disclosures**

Before we get started with the discussion, I’d like to confirm that you reviewed the Privacy Notice shown to you as you were logging into our session today, and see if you had any questions about it?

[**Wait for an acknowledgement from each participant and answer questions as needed.**]

We would like to record the session today. We are collecting personal information only to help with recruitment and scheduling.

During this interview we will be collecting your responses and feedback. They’ll be aggregated with feedback that we get from other people. During the interview, I will not refer to your first or last name to ensure it will not be recorded.

None of your personally identifiable information will ever be shared. **Quotes or insights from our discussion may be shared publicly but always anonymized.**

Some of your experiences may be sensitive or hard to share with someone you just met. It is my job to make sure you are comfortable. This is a safe place for you to share your thoughts and stories. If at any time you don’t feel comfortable or prefer not to answer, just say “I’d like to pass” or “I prefer not to answer.”

Let’s talk about what you can expect over the next 30 minutes.

## **Overview and set expectations (1 minute)**

**Overview**

Our session today will be **XXX** minutes. Here’s what we’re going to cover today:

* Topics to be covered

Bring up anything you feel is relevant to this conversation. There are no wrong answers! We want to have an open, honest conversation with you today.

Do you have any questions about anything I mentioned? If not, I will start the recording.

[**Ask for verbal yes or no**.]

**[START RECORDING.]**

The recording has started, can you re-confirm that you agree to have this session recorded?

## **In-depth topic-based discussion (20 minutes)**

## **Get to Know the Participant**

## Thank you! Now, before we get started, I’d love to learn a little bit about you.

1. Without saying your name, tell me about yourself – who do you live with, what do you do?
2. What does your typical weekday look like?
3. Tell me about your specific experience when you have gone to a store to get cashback.

Awesome, thanks for sharing. Now, let’s talk about your experience with cash back fees.

|  |  |  |
| --- | --- | --- |
| **Topic** | **Possible probes** | **Follow Up / Notes** |
| Ex. Procurement of Cash | Ease or difficulty in obtaining cash | *Can you explain why it is easy/difficult?* |
| Method |  |
| Location | *ATM, cash back at point of sale, asking family/friends, etc?* |
| Etc | Etc | *Etx* |
| Etc | *Etc* |

## **Wrap-up and conclusion (4 minutes)**

Thank you for sharing your thoughts and feedback with us today. Is there anything you’d like to share with us before we end the session. Do you have any questions?

**[STOP THE RECORDING]**

*Are you okay with us following up with you about potential future studies?* Could you please share your email address in the chat?

### Should the client need additional support, we can direct them to the following website:

### XXXXXX