UX Interview Questions for CFO (Max)

Warm-up & Context•
"Thanks for joining—reminder this is about the *internal* Admin side, not merchants."

We are redesigning our merchant onboarding process into a comprehensive platform that will automate tasks, capture richer data, and provide every team member with a clearer view of the onboarding process for merchants. To ensure the new experience truly supports your work, we're conducting a brief round of one-on-one research interviews with colleagues from across the company, both those who actively complete onboarding tasks *and* those who primarily review progress in a read-only capacity.

Background & Role in Merchant Onboarding

- **Role and Involvement:** Can you describe your role in the company and how merchant onboarding projects factor into your responsibilities and goals? (This helps us understand what aspects of these projects are most relevant to you.)
- **Business Goals:** What is the larger business goal for the merchant onboarding initiative from your perspective, and why is it important to the company's success?
- **Definition of Success:** In your view, what would **success** look like for the merchant onboarding initiative, and what metrics would you use to measure it?makeiterate.com For example, are you looking at the number of merchants onboarded, the speed of onboarding, financial impact, or other indicators?

Current Information Flow & Sources

- **Information Sources:** How do you **currently get information** about the status and progress of merchant onboarding projects? For instance, do you rely on regular reports, dashboards, meetings, emails from team members, etc.?
- **Providers of Updates: Who** typically provides you with these updates? (e.g. project managers, operations team, CTO) And **how** are those updates delivered to you (formal report, casual email, executive meeting)?
- **Frequency of Updates:** How often do you receive updates on onboarding progress or timelines (daily, weekly, monthly)? Is this frequency sufficient for your needs, or do you sometimes find yourself needing information more/less often?
- **Level of Detail:** Do the updates you get usually provide the right level of detail for you, or do you find them too high-level or too granular? If possible, can you describe a recent update that was either very helpful or one that left you needing more information?

Metrics & Key Performance Indicators

- **Key Metrics:** What **key performance indicators (KPIs)** do you consider when evaluating the success or health of our merchant onboarding projects?makeiterate.com For example, are there particular metrics (financial or operational) that you always look for in reports about these projects?
- **Top Priorities:** Among those metrics, which are the **most important** or top priority in your eyes? (E.g. total merchants onboarded vs. onboarding speed vs. cost per onboarding, etc.) Why are those the most critical?
- **Holistic View:** Do you tend to care about **all aspects** of the onboarding process (from timeline to budget to risks), or are there specific areas you focus on more heavily? (We've assumed you likely have interest in the overall picture, but we'd like to know if anything stands out.)
- **Progress & Timeline Metrics:** Since you mentioned caring about progress and timelines, what metrics or indicators of project **progress** do you pay attention to? (For instance, on-time completion rate, milestone hit/missed, average onboarding duration, etc.) How do you currently track whether projects are on schedule?

Tracking Progress & Timelines

- **Current Tracking Method:** How are the above KPIs and progress metrics **tracked and reported** to you currently, and does that reporting method meet your needs for decision-making?makeiterate.com For example, do you receive a dashboard or a written summary highlighting timeline status, delays, and completions?
- **Identifying Delays:** How do you find out if a particular merchant onboarding project is **delayed or facing issues**? Is there an alert system, or do you rely on someone informing you in meetings?
- **Granularity of Tracking:** At your level, do you ever need to **drill down** into the status of an **individual** merchant's onboarding, or do you strictly focus on the **aggregate** portfolio view? In other words, would you ever want to see details of a single project (e.g. a key merchant partnership) or only summaries and exceptions for the overall program?
- **Timelines and Forecasts:** How important is it for you to have **timeline forecasts** (e.g. expected completion dates for ongoing onboardings) and to compare them against actual progress? Do you currently get any forward-looking information about whether projects are on track to meet deadlines?

Insights & Decision-Making

- **Use of Information:** Once you receive information or reports about onboarding progress, **how do you use those insights** in your work? Can you give an example of a decision or action you've taken based on the information you received about these projects?

- **Impact on Financial Decisions:** Does the progress of merchant onboarding projects influence any of your **financial planning or forecasting** decisions (for example, revenue projections, budget allocations, resource planning)? If so, how do you incorporate that information?
- **Desired Insights:** Are there any **insights or analyses** about the onboarding process that you **wish** you had readily available but currently don't? (For instance, trends over time, forecasts of how onboarding speed affects revenue, cost-benefit analysis of accelerating onboarding, etc.)
- **Risk and Exceptions:** What type of information about **risks or red flags** in these projects do you want to see? (e.g. "alert me if a project is X% over time or budget"). Do you feel you currently get enough visibility into potential problems early on?

Tools & Format Preferences

- **Preferred Formats:** In what **format** do you prefer to consume this information? For example, do you like detailed Excel spreadsheets, high-level PowerPoint summaries, interactive dashboards, email briefs, or something else? Why does this format work best for you?
- **Comfort with Systems:** How comfortable are you with using an **internal tool or dashboard** to check on project status yourself? Would you log into a system like our new platform to get insights, or do you prefer that information be distilled and delivered to you by your team?
- **Current Tools:** Do you or your team currently use any **specific tools or software** for tracking or reporting on these projects (for instance, a project management software, BI dashboard, or even manual spreadsheets)? If so, what's your experience with them – what do you like or dislike about those tools?
- **Visual vs. Data Detail:** When reviewing project status, do you prefer **visual summaries** (charts, graphs, RAG status indicators) or **detailed data** tables, or a mix of both? (This helps us tailor any dashboard or report – some executives like a quick visual snapshot, while others want to see the numbers backing it up.)

Pain Points & Challenges

- **Frustrations:** What are the biggest **challenges or frustrations** you have with the **current process** of getting information on merchant onboarding projects? (For example, do you find the information is often delayed, too detailed, not detailed enough, unreliable, etc.?)

- **Information Gaps:** Have you ever found yourself **missing information** that you needed about these projects? If so, can you describe a situation where you needed data or an update that wasn't readily available or was hard to obtain?
- **Timeliness:** Do you feel you get information **in time** to react if there's an issue, or do problems sometimes come to your attention later than you'd prefer? If the latter, how would you like that to change?
- **Overload vs. Useful Data:** Do you ever feel **overwhelmed with data** or updates that aren't relevant to you? Or conversely, do you feel you have to **dig to find** the insights that matter among a lot of data? Understanding this will help us streamline the reporting for your needs.

Expectations & Ideal Scenario

- **Ideal Information Flow:** In a perfect world, how would you **like to receive updates** on merchant onboarding progress and outcomes? (For instance, imagine the ideal cadence, format, and level of detail – what would that look like for you to feel fully informed yet not overwhelmed?)
- **Feature Wish List:** If you could have a tool or system do **exactly what you want** for keeping you informed, what features or capabilities would it have? (e.g. automatic alerts for delays, a one-page dashboard with all key metrics, the ability to drill down into financial impact, etc.)
- **Involvement Level:** How involved would you like to be with a new system we implement for merchant onboarding? Would you want to provide any input on what it reports, or would you mainly be a consumer of its output? In other words, what are your **expectations** from this tool as the CFO?
- **Success Criteria for Reporting:** Lastly, thinking about this future process/tool, what would make you say "this reporting process is **successful**"? Is it about having **real-time visibility**, improved **accuracy**, time savings for you, better **predictive insight**, or something else?
- "Anything we didn't cover that you think is critical?"