## **A. Research Objectives**

| **Item** | **Details** |
| --- | --- |
| **Primary Goal** | Create a definitive Confluence dashboard/Wiki of all *current* lending-partner features. |
| **Key Use Case** | Give front-office staff a fast, searchable reference so they can compare lender features and answer complex questions in < 1 minute. |
| **Success Metric** | A front-office teammate can answer a nuanced customer question about a lender’s features in under one minute. |
| **Constraints** | • **Time:** 60-minute max per interview  • **Scope:** Only features *live* in production  • **Participants:** Business leaders (Joe, Bill, Brad, Marlys, Lisa,Shianne, Alec…)  • **Secondary Goal:** Engage Engineering(Rbohn, Clint, Bob, Donald…) to validate programmatic data-gathering (lender endpoints, internal DBs). |

## **B. Interview Script**

**Total length:** ~60 minutes  
 **Recording:** Yes—transcribe for synthesis.

### **1. Introduction & Goal-Setting (0-5 min)**

**You:** *Hi* ***[Leader’s Name]****, thanks for meeting today.* *We’re consolidating our knowledge of lender features into a searchable Confluence dashboard. Your insights are critical.* *I have a structured set of questions; the session will take about an hour. Sound good?*

### **2. High-Level Feature Inventory (5-20 min)**

**You:** *To start, could you walk me through the lender features you see as most valuable to our Merchants? Which capabilities do you see as the most critical today?* **✎ Interviewer action:** Listen only. Capture a list of **2-4 headline features** without probing yet.

### **3. Feature Deep-Dives (20-50 min)**

Repeat the block below for each priority feature (aim for 2-3 features, time-permitting).

1. **Feature Overview** – *“Describe what this feature does, start to finish. Who uses it?”*
2. **Use-Case Scenarios** – *“What are the common real-world scenarios?”*
3. **Rules & Caveats** – *“What rules, limitations, or caveats must the team know?”*
4. **Variations** – *“Does it behave differently for different lending partners (flavors/versions)?”*
5. **Dependencies** – *“How does it interact with other features on our platform?”*

### **4. Final Questions (50-55 min)**

**You:**

1. *“Is any data about these features accessible programmatically (lender APIs, internal databases)?”*
2. *“Is there anything else—big or small—that the front office absolutely must know that we haven’t covered?”*

### **5. Wrap-Up (55-60 min)**

**You:** *Thanks again,* ***[Leader’s Name]****. Your details on* ***[Feature 1]*** *and* ***[Feature 2]*** *were extremely valuable.* *Next, I’ll synthesize today’s insights with other leaders’ input and share a draft dashboard/wiki for your review. Have a great day!*

## **C. Quick Feedback & Suggestions**

1. **Bias Minimization** *Your open-ended questions already avoid leading the witness.* To go a step further, explicitly state up front:  
    *“There are no wrong answers—I’m interested in how you perceive the product, not what you think I want to hear.”*
2. **Product-Specific Prompts** You noted you’re **not** directly asking about product areas like *Top-Off* or *Pre-Qual*. That’s fine for bias control, but consider a **gentle catch-all** at the end of each deep-dive:  
    *“Did we miss any feature adjacent to this one—e.g., financing terms, credit workflows—that customers ask about often?”* This lets the participant volunteer domain-specific items without you steering them there.
3. **Time Check Reminders** Add subtle checkpoints to keep the 60-minute limit:  
   * At **20 min**, confirm you have the top features listed.
   * At **45 min**, move to Final Questions if you’re running long.
4. **Engineering Hand-Off** Flag each programmatic data idea during the interview (e.g., *“API endpoint exists”*). Later you can feed these to Engineering as ready-made backlog tickets.
5. **Post-Interview Template** Create a standard Confluence page template for each lender feature: **Feature Name / Description / Use Cases / Caveats / Variations / Dependencies / Data Sources**. Filling this in right after each interview keeps details fresh and consistent.

Feel free to tweak section names or add clarifying language—this structure should paste cleanly into Confluence and keep interviews uniform while giving participants lots of room to express their own mental model of the product.

THOUGHTS……..  
  
Here’s a simple way to run it:

1. Assign coverage (before interviews). We will let the leader know who the lenders are we will be talking about.

* Pick ~6–8 highest-impact lenders (by volume, support burden, or feature complexity).
* Create a matrix of **Leaders × Lenders** with roles:  
  + **Primary SME** (drives the deep-dive; accountable for accuracy)(Vicki, Ed, Max, etc)
  + **Secondary Reviewer** (sanity-checks and adds gaps)(Brad,Lisa,Marlys, Support, Onboarding)
* Avoid single points of failure: no leader should be the sole voice on a lender.

1. Timebox the interview (still 60 minutes)

* **10 min — General overview (all lenders):** “What patterns, caveats, and common tickets do you see across lenders?”
* **40 min — Deep dive (assigned lender[s]):** Use your feature block (overview, use cases, rules/caveats, variations, dependencies).
* **10 min — Cross-lender deltas:** “Where does this lender behave differently from the pack?”

1. Synthesis & validation

* Draft the Confluence page for each lender using the template.
* Route to the **Secondary Reviewer** for quick comments (asynchronous, keeps within your 60-min live constraint).
* Tag anything that smells opinion-based for **engineering validation** via endpoint checks/logs.

Why this beats “general knowledge only”

* Prevents shallow, fuzzy entries and contradictory statements.
* Creates accountability for accuracy per lender while still harvesting broad patterns.
* Makes it easier to maintain the dashboard later (you’ll know who to ping for updates).

Quick assignment heuristics

* **Ownership:** Who last configured/owns the relationship?
* **Recency:** Who worked with this lender in the past quarter?
* **Coverage balance:** Distribute complexity evenly; avoid overloading one person with all “hard” lenders.
* **Diversity:** Pair a business leader as Primary with someone from Support or Ops as Secondary for real-world caveats.