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| **SESSION DETAILS** |
| **Participants** |  |
| **Date** |  |
| **Time** |  |
| **Location**  |  |

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| **INTRODUCTION** |
| Thanks for talking with me today. In our discussion, I want to better understand your goals and needs and to capture pain points of the current process and <product>. Before we get started, is it ok if I record this session just for note-taking purposes? Recordings will not be shared outside of this session and will remain anonymous. |

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| **Part I: Background** |
| To better direct our discussion, I’d like to first understand more about what you do. Can you please explain in a couple of sentences what your role is and how many years you have been working here? |  |
| **Part II: RESPONSIBILITIES AND WORKFLOW** |
| “What are you trying to accomplish?” *[Gather context, understand the goals and explore the scale of the problem]*“How do you currently do this?”[*Pay attention to their workflow*]“Can you show/tell me what’s frustrating about your current process and how you are dealing with these issues now?”*[Listen for opportunities to improve]* |  |
| **Part III: CURRENT APPLICATION** |
| What are your top 3 pain points around the current <product>? Why?What are your top 3 positives around the current <product>? Why?What are the top 3-5 tasks that you perform using the current <product>? How frequently do you do this?How well does the current <product> help you achieve your goals? How does it hinder them? Why? |  |

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| **Part IV: CLOSING/THANKS** |
| Who else would you recommend I interview?Is there anything I didn’t ask that you would like to talk about?As I reflect on this interview, I may want to follow-up with you for additional clarification. Is this OK?If you think of anything later, please feel free to reach out to me. |  |

**Additional Discussion Topics/Questions:**

*[If you have an opportunity to ask more questions, list some here that would provide additional insight to your interview goals. You can pull from this list to help you adjust and adapt interviews]*