Stakeholder Interview Template

PROJECT VISION
• What is your vision for this offering?
• What defines success for this project?
• What are the potential pitfalls (ie. what keeps you up at night about this project)?

USERS
• Different types of users (salesperson vs supervisor vs analyst)
• Who is primary?
• Role(s)?
• Typical Background?
• Defining Attribute?

VALUE PROPOSITION
• What problems do users have that this offering solves?
• What is the core value prop of the offering?
• What are the main marketing messages?

COMPETITION
• What similar tools are in use today?
• Target Market? Value Proposition?
• What are their relative strengths/weaknesses?
• How is this offering different?

YOUR CUSTOMERS
• Target market(s)?
• What role is your team selling to?
• What problem do they have that *their* offering solves?
• Who is their competition?
• How are they differentiated?

PROCESS & WORKFLOW (example questions here for a Salesperson role)
• What is the nature between the salesperson and their customer?
• How does the salesperson know when it is time to engage with a customer? Are their multiple types of engagements? Are there other key patterns (eg. cyclical patterns, size of company, level of customer savy-ness, industry, etc)
• How do they prepare? How do they work with? What tools do they use?
• How do they engage? What is the first step? And the next (and so on)? How does the engagement end?
• What frustrations/ pain points do they experience with their current process?

CONTEXT OF USE
- What tools do they use today? Where do those tools fit? (collect screenshots, printouts, any relevant articles if possible)
- What data points do they collect today? What insight are they able to share with customers today? How do they share it? What does it look like?
- What's missing in the current process that this tool will provide?
- Where do you imagine your new (or redesigned) offering will fit?

USER GOALS
- What defines success? (if an experience goes well, what happens, commission? bonus?)
- What is a bad results? (If an experience doesn't go well, what happens?)
- If users had a "magic wand" and could wish for anything to make the process better, what would they wish for?