# Stakeholder Interview Template (FREE)

* Set up meeting date and time with stakeholder
* Send confirmation email to //stakeholder
* Include meeting pre-read (you can use this template to work your pre-read from)
* Ensure you record the meeting (if possible – or make notes)
* Send thank you email post-meeting to stakeholder and include a brief summary of meeting findings.

Ensure you set up your meeting by making use of the below points. Feel free to add or remove questions/sections. Prior to stakeholder meeting, see if you can research your stakeholders and the product relating to this meeting to ensure you know who you will be dealing with and to better prepare your specific questions.

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| Stakeholder Name: |  |
|  |
| Date: |  |
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| Notes: |  |

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| TELL ME ABOUT YOURSELF |
| How long have you been with this company? |  |
| What is your main goal in your position? |  |
| What does your day-to-day look like? |  |

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| THE PROJECT VISION |
| What is your vision for this offering/product/service? |  |
| What ,according to you, defines success for this project? |  |
| What are the potential pitfalls (ie. what keeps you up at night about this offering/product/service)? |  |

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| ABOUT THE USERS/CUSTOMERS |
| Please elaborate about the different types of users (salesperson vs supervisor vs analyst) |  |
| Who is/will be the primary? |  |
| Role(s)? |  |
| Typical Background? |  |
| Defining Attribute/s? |  |

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| VALUE PROPOSITION |
| What problems do users have that this offering/product/service aim to solve? |  |
| What is the core value prop of the offering? |  |
| What are the main marketing messages (if any)? |  |

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| COMPETITION |
| What similar tools are in use today? |  |
| Target Market? The competition’s Value Proposition? |  |
| What are their relative strengths/weaknesses? |  |
| How is this offering different to the competition? |  |

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| YOUR CUSTOMERS |
| Target market(s)? |  |
| What customer base is your team selling to? |  |
| What problem do they have that *their* offering solves?  |  |
| Typically, who is their competition? |  |
| How are they differentiated? |  |

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

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| 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 offering/product/service will provide? |  |
| Where do you imagine your new (or redesigned) offering/product/service will fit?  |  |

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| USER GOALS |
| What defines success? (if an experience goes well, what happens, commission? bonus?) |  |
| What is a bad result? (If an experience does NOT go well, what happens?) |  |
| If users could ask for anything to make the process better, what would they ask for? |  |