Interview Guide

1. Define Objectives & Scope

- ✓ Clearly identify the purpose of the interview (e.g., requirements gathering, process improvement, stakeholder insights).
- ✓ Determine the key topics and questions to be covered.
- ✓ Identify the right stakeholders to interview (e.g., end-users, managers, SMEs, executives).

2. Plan & Prepare

- ✓ Select the type of interview:
  - Structured – Fixed questions, ideal for quantitative insights.
  - Semi-Structured – Mix of predefined questions with flexibility for follow-ups.
  - Unstructured – Open-ended discussion for exploratory research.
- ✓ Prepare a questionnaire or discussion guide with:
  - Open-ended questions ("Can you describe your biggest challenge with the current system?").
  - Follow-up prompts to dive deeper ("Can you provide an example?").
- ✓ Choose the interview format:
  - Face-to-face – Best for engagement and rapport-building.
  - Virtual (Zoom, Teams, etc.) – Convenient for remote participants.
  - Email/Chat – Useful for quick feedback but lacks depth.
- ✓ Schedule interviews in advance and set expectations with participants.

3. Conduct the Interview

- ✓ Start with introductions and explain the goal of the session.
- ✓ Build rapport with small talk and make the participant feel comfortable.
- ✓ Ask clear and concise questions—avoid leading or biased questions.
- ✓ Listen actively and take detailed notes (or record with permission).
- ✓ Encourage elaboration with prompts like:
  - "Can you explain that in more detail?"
  - "Why do you think that issue occurs?"
- ✓ Manage time effectively—stick to key topics while allowing flexibility.

4. Analyze & Synthesize Findings

- ✓ Review interview notes and extract key themes, pain points, and insights.
- ✓ Identify patterns across multiple interviews (e.g., common challenges or requests).
- ✓ Categorize insights into business needs, functional requirements, process gaps, or risks.

5. Validate & Report Insights

- ✓ Summarize findings into a structured Interview Summary Report, including:
  - Key stakeholder concerns and insights.
  - Challenges and improvement opportunities.
  - Recommended actions based on responses.
- ✓ Validate findings with interviewees or SMEs for accuracy.
- ✓ Present insights to project teams, stakeholders, or decision-makers.

Tips:

- Ask neutral, open-ended questions to avoid bias.

- Build trust and rapport—make stakeholders feel heard.
- Take detailed notes or record the session (with permission).
- Be adaptable—probe deeper when necessary.
- Avoid technical jargon—use simple, clear language.
- Keep the session concise (30-60 minutes) to respect stakeholders' time.