**DEEE Interview Guide Template**

**INTERNAL: NOT FOR INTERVIEWEE DISTRIBUTION**

Purpose

In order to better understand the selected process, the project team (i.e., the team seeking to optimize a given end-to-end process) will conduct interviews with process stakeholders related to the relevant use case. The information obtained via interviews will be critical in incorporating the user experience and ensuring it is a major factor considered when documenting challenges or inefficiencies in the process, and when developing potential solutions. Through these interviews, the project team will further solidify its understanding of the user experience, identify pain points and areas for improvement, understand roles, and validate methods.

The following information is genericized such that it does not apply to a specific process; therefore, the objectives, personas, and questions should be revisited and tailored for each selected process and relevant use case prior to conducting interviews.

Objectives

Outputs of the interviews will drive inputs into the development of journey maps. Interview objectives are to:

* Understand the nuances of organization-specific processes
* Identify common roles and responsibilities across stakeholders in various organizations/functional groups
* Elicit and document user-identified pain points
* Understand each organization’s scope of the process (e.g., handoffs or division of responsibility between customer/provider or different functions)
* Gather information to refine the project team’s hypothesis of personas
* Reconcile differences between the documented process and stakeholders’ self-reported activities and actions

General Guidance

* Interviews should be focused on the stakeholder’s **experience and emotion** throughout the process, and not a process overview (the project team should be able to communicate or show their understanding of the process via a snake chart or similar artifact to level-set and enable this type of experience-oriented interview)
* Effectively communicate to the interviewee that the project team is there for their benefit and **provide some background** on the project goals (e.g., solutioning goals) and how the stakeholder’s participation will impact the effort
* When possible, ask the interviewee to **show the process** rather than simply describe it (e.g., open an application and process a transaction)
* When necessary, **set parameters before asking a question** (e.g., if question is specific to a certain sub-process, inform interviewee of area of interest) so the interviewee can expand on their answer, but stay within the bounds of what information is sought
* Indicate to the interviewee that they will be representing one of the identified personas (if applicable) to **emphasize that** **their voice matters**
* Key items to listen/look for and document:
  + Actors
  + Sub-Process
  + Sub-Process Scope
  + Sub-Process Inputs and Outputs
  + Exceptions
  + Emotions
  + Workarounds

Questions

The questions listed below are provided for reference when conducting interviews. These should not be used as a questionnaire, but instead as a guide for desired outcomes. The *Background/Goals* column explains the logic behind each question and the information desired as a result of the question. If interviewees do not provide the desired information, ask appropriate follow-up questions. **The table below and questions within are not to be shared with the interviewee prior to or during the interview.**

|  |  |
| --- | --- |
| **Question** | **Background/Goals** |
| **Role** | |
| What is your title and role in the process? | * Understand where the interviewee fits into their organization * Learn how to compare titles across organizations |
| What is your department’s title? | * Understand scope of what the interviewee’s department does * Learn how to compare departments across organizations |
| How long have you been in this role? | * Understand the interviewee’s level of experience and comfort with the process, relationships, and systems |
| What is your domain or responsibility as the process leader? | * Understand where the interviewee sees themself aligning/engaging with the overall process |
| What processes are you responsible/accountable for? Organization-wide or office-specific responsibility? | * Determine what areas we should consider the interviewee to be a SME/POC |
| What are your day-to-day activities in the process? | * Understand interviewee’s day-to-day as that will likely be a major factor in solutioning * It is a leading practice to show the project team’s current understanding to get the interviewee’s reaction / refinement |
| What must happen before you can do your work and who is involved? | * Understand relationships between process actors, inputs, and outputs |
| Is there anything within your current job function that is not needed? | * Identify redundant or otherwise unnecessary process steps |
| Have there been complaints of the system from colleagues within your role? | * Identify potential pain points that the interviewee might not personally feel |
| **Team/Department** | |
| What is the overall volume / scale of the process? | * Understand frequency of the end-to-end process * Estimate the total workload for all personnel |
| With what frequency does your team report to leadership? What information is reported to leadership or external stakeholders? | * Gauge the effort required for reporting |
| How many people/departments are involved in the process? | * Understand who is involved relative to what is described in the provided documentation |
| Which people/departments do you interact with most? Are there any handoffs? | * Understand organizational structure and validate process steps * Identify pain points related to handoffs |
| **Process** | |
| Where do you define the process beginning and ending? Are there certain events that signal the beginning or end? | * Understand what the interviewee sees as the scope of the process * Determine where the interviewee enters and exits the end-to-end process |
| What is a realistic timeline for the entire process? | * Compare the documented/expected timeline to the actual timeline |
| Are there “special” processes handled outside the normal process? At what point do they come back into the normal process? | * Understand any unique circumstances where processes are performed outside the normal cycle |
| Does anything come to mind where you or the team do not follow the documented process? If so, why? | * Understand where stakeholders deviate from the documented process and what workarounds they utilize * Determine if workaround is more/less efficient than documented process |
| What systems are you using for this process? Do these systems interact or is cross referencing required? | * Determine what systems are involved and where there might be system integration inefficiencies |
| What key dependencies exist in the process? Are there any bottlenecks you think could be eliminated? | * Identify bottlenecks or how the interviewee thinks the process can be streamlined |
| What is the error rate for the major steps of the process? How are potential errors identified? | * Uncover areas where there are repetitive mistakes and identify root causes of those issues |
| **General** | |
| What are your general feelings/thoughts towards this process? | * Understand the interviewee’s general sentiment towards the process |
| What are some general pain points in the process that you personally experience or know inhibits your team’s work? | * Understanding where there are roadblocks in the process |
| If we could focus on one area of the process, what would you choose, and why? | * Understand what the interviewee sees as the most impactful pain point |
| If you could provide any piece of process feedback to leadership, what would it be? | * Provide a venue for the interviewee to give leadership feedback |
| If process changes could help your organization, what do you think would make their implementation easier and more efficient for you and your team? Do you think you and your colleagues are open to process changes or automation? Has your group gone through any such changes in the past? If so, how was the overall experience? | * Gauge the interviewee’s feelings towards solution implementation * Understand if there is likely to be any organizational resistance to change in the process * Leverage the interviewee’s experience in organizational change, if possible |
| If parts of the process were to become automated, what other roles could employees be performing? Where else could their expertise be allocated? | * Gauge interviewee’s/organization’s general openness to automation * Understand if the interviewee/organization has identified areas where they could use additional personnel |
| Are there parts of the process that would not be able to be automated because they are ad hoc or require a separate process? | * Determine what parts of the process likely will not be automatable |
| **Closing** | |
| Is there anything we did not ask that you expected us to? | * Provide a venue for the interviewee to speak openly about any subjects that have been addressed |
| What other information should we know about the process? | * Determine if there are any sub-processes that were not included in the hypothesized end-to-end process |
| Do you have any suggested POCs we should speak with, based on this conversation? | * Determine if there are any stakeholders that were not originally identified * Confirm future interviews |