DISCOVERY INTERVIEW: Sample Guide

Client Name

INTERVIEWEE BACKGROUND
In this section, document any key notes about the interviewee you need to know going into the interview. For example, you can include which Target Audience area they fall into and what they’re major attributes are. Also document who the interviewer and note taker were in the session.

<table>
<thead>
<tr>
<th>Interviewer</th>
<th>Note Taker</th>
</tr>
</thead>
</table>

OVERVIEW
This lays out the general flow of the interview including the timing and objective of each topic area.

<table>
<thead>
<tr>
<th># Min.</th>
<th>Topic</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Welcome &amp; Setting the Stage</td>
<td>• Warmly welcome the client and provide context for the interview</td>
</tr>
<tr>
<td>5</td>
<td>Client Information</td>
<td>• Get to know more about them and their background</td>
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</tbody>
</table>
| 30     | Probing Topic Questions            | • Dig into the areas of your clients’ lives and experience that you want to learn more about, such as:  
|        |                                    |   o Their specific experiences, needs and desires regarding unsecured debt  |
|        |                                    |   o Their reasons for coming to your agency                               |
|        |                                    |   o How they arrived at your agency                                        |
|        |                                    |   o Their interactions with staff                                          |
|        |                                    |   o Their experience with products and services provided by your agency    |
| 5      | Any Additional Questions & Wrap Up | • Allow the client to ask questions and wrap up interview                  |
SCRIPT & NOTES FROM INTERVIEW
In this section, you will lay out the prospective questions for each individual interviewee prior to the interview. During the interview, please take detailed notes in this section or on a separate page.

Welcome & Setting the Stage
- About {your organization}
- Purpose of the interview and project
- Why they were chosen to be interviewed
- How their responses will be used

General Warm Up
- Name
- How long have you been using the services of {your organization}?
- What services have you used at our organization?

Probing Topic Questions
- How did you first hear about {your organization}?
- What made you come into {your organization} the first time?
  - How did you feel when you came into {your organization} the first time?
- What challenges were you facing when you entered services (or are currently facing if not a client)?
- Tell me about your current financial situation.
  - What financial challenges remain for you?
- What are your financial goals for the future?
- Can you describe your experience receiving services from {your organization}?
- What are your thoughts on the DMP/service you’re enrolled in?
  - Why do you feel this way?
- Was there any confusion when enrolling in these services?
  - If so, how did this effect your decision making?
- Was there anything you would recommend we do differently when enrolling new clients?
- What motivated you to apply to the DMP/service?
- What keeps/kept you in the DMP program/service?
- Can you describe your interactions with staff members at {your organization}?
- Do you reach out to staff with questions?
  - If so, how often?
  - What kinds of questions do you ask?
  - Are staff members able to help you?
  - If not, what are the reasons you wouldn’t reach out to our staff with a questions?
- How do staff reach out to you?
  - What are the reasons you wouldn’t respond to our staff when they reach out to you?
- Are there any ways in which we can better support your success in the DMP/service?

Any Additional Questions & Wrap Up
- Allow time for interviewee to ask questions
- Close and thank the client
• Share how we’ll use the information provided

**KEY THEMES & TAKEAWAYS NOTES**

*After the interview, review the notes from the interview and categorize the information into the general topic areas you are working through in Smart Growth. For example, if a client describes major barriers faced during the client experience, this can inform the client journey map.*

• Challenge
• Logic Model
• Customer Journey Map
  o Process Items to Add or Change
  o Potential Barriers
• Target Audience
• Other Insights