ROLE CARD 6 · BANK · INTERVIEWER'S BRIEF

The new account

You are an instructional designer. You are going to interview a branch adviser in a bank.

The project

A short eLearning module for **new bank advisers**, who will have to **open an account for a new customer**.

Your goal: find out…

1. the **steps**, in the right order;
2. one **decision point** (when « it depends »);
3. the most **common mistake** beginners make;
4. **who to call** when something goes wrong;
5. the **words** a beginner wouldn't know;
6. anything the SME would **only tell you in person**.

How it works

- **2 min**: prepare your opening and five questions.
- **8 to 10 min**: the interview. Set expectations, ask open questions, probe, redirect politely.
- **1 min**: the read-back: « So the way I have it… Did I get that right? »

Remember

Thanks for making time for this. · This module is for… · What I'm hoping to accomplish is… · Could you walk me through…? · Tell me about a time when… · Depends on what? · What goes wrong most often? · What would that look like if a beginner were doing it? · That's interesting, but going back to our goal… · So, if I understand correctly… · Is there anything you'd only tell someone in person?