Client - Facing Planning Associate Interview

The following interview guide can be used to collect data from planning associates and their managers. The goal of this interview should encourage users to talk more about the depth of learning they have, their concerns about speaking with clients on this topic, and identify when users will consume the learning.

1. Do your clients often inquire about investment options they hear from the media?

2. If so, do they typically ask your opinion on these topics or do they more directly request you act on their "tip"? (This question helps us understand if learners expect resistance to their suggestions and helps us know if they are "competing" with the media influencer?)

3. If clients often inquire about media suggestions, how do you typically address these requests?

4. Do clients prefer jargon-filled answers? (If yes a follow-up question may be: would they see simplistic answers as patronizing? This type of question is trying to determine if our explanation can be too simplistic or insulting. Clients that parrot media influencers may see themselves as "experts".)

5. Do you like researching topics and doing deep dives on information? (This helps us know if we can include basic info on the module and expect them to research the topic more fully on their own. If they do not do this, we may want to provide some sources for learning)

6. A client sends you a unique question and does not need an immediate answer, when would you research it? (Immediately? At lunch? At night? Right before your next meeting? This question is more about extra learning habits; it is assumed that our learning module is intended to help them answer clients quickly and definitively.)

7. Where would you research it? (At your desk? Some personal space? On your commute home?)

8. Do you prefer doing extra research on a desktop or mobile device?