



Interview Guide – CPA Persona

Introduction

Hi, my name is [name] and I'll be walking you through the interview today. I am joined by my colleagues [name] who will be taking notes during our session.

Thank you for agreeing to speak with us today. The research team is working on building personas, fictional representations of real users, to help our company empathize and understand our users' needs and wants. We want to learn more about your work flow and day to day, so today we would like to ask you some questions about you, your office, and your clients.

As a thank you for your time you will be emailed a virtual Amazon gift card for \$100. You will receive this email directly from Amazon by the end of today.

Our interview will last approximately 30 minutes. If you need to stop the interview for any reason we will do so. If it's ok with you, I'd like to ask for your permission to record this interview. The recording will only be used to help with our note taking. Do I have your consent to record today's interview? {BEGIN RECORDING}

Great! Before we begin do you have any questions for me?

Questions

First, I have a few questions about you and your office:

1. Provide an overview your services and offerings.
2. What is your fee structure?
3. Describe a typical day for you.
4. Name the different types of software you use daily.
5. What software enhancement would make your life easier?
6. What is your process for suggesting the purchase of new office software?
7. Do you research or trial software prior to purchasing?
8. What are some of your biggest challenges?



9. Where do you see yourself professionally in 5 years?

Great! Thank you for the details you have provided us. Now let's talk about your clients.

1. How many clients do you have?
2. What do your clients expect from you?
3. What drives interactions with your clients?
4. How do you approach tax preparation for your clients?
5. Describe your typical client:
 - a. What is their gross yearly income?
 - b. Age?
 - c. Profession?
6. Describe your ideal client.

What else would you like to share with us?

Does the team have any questions?