

THE INVESTIGATOR'S BALANCE · RESOURCE 6 OF 7

Interview Preparation Worksheet

Prepare so you can be humane in the room and rigorous on the record. Plan the process, the open prompts, and the evidence you will test — before the conversation begins.

How to use this: Complete one worksheet per interview. Open prompts come first; verification questions come after the person has told their account in their own words.

1 · MATTER & INTERVIEW

MATTER / CASE NO.

INTERVIEWEE & ROLE

DATE / FORMAT

2 · PREPARE — CONFLICT SCREEN & ROLE SCRIPT

Conflict screen complete? ☐ No conflict ☐ Safeguards in place ☐ Escalated / recusal considered

ROLE, SCOPE, AND CONFIDENTIALITY I WILL STATE UP FRONT

3 · ELICIT — OPEN, NON-SUGGESTIVE PROMPTS

OPENING PROMPT(S) TO INVITE A FULL NARRATIVE IN THEIR OWN WORDS

VALIDATE-THE-PERSON LANGUAGE READY TO USE (ACKNOWLEDGE DIFFICULTY WITHOUT ACCEPTING FACTS)

4 · EXAMINE — WHAT TO VERIFY & TEST

RECORDS / DOCUMENTS / TIMELINE TO MAP

ALTERNATIVE EXPLANATIONS TO TEST

SPECIFIC FOLLOW-UP / CORROBORATION QUESTIONS (ASKED AFTER THE OPEN ACCOUNT)

5 · CLOSE — LOGISTICS & NEXT STEPS

WHAT I WILL EXPLAIN AT THE END (PROCESS, NEXT STEPS, NO-RETALIATION, HOW TO ADD INFORMATION)

Be warm in the room. Be strict on the record.

Dr. Marquita M. Booker, Esq. | By-The-Book Workplace Investigations | Human-Centered, Fact-Focused Companion Hub

Disclaimer: For educational purposes only; does not constitute legal advice. © By-The-Book Workplace Investigations. All rights reserved.