

**PROFESSIONAL DEVELOPMENT**

# **CUSTOMER INTERVIEWS: A FIELD GUIDE**

**By Steve Johnson  
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# CUSTOMER INTERVIEWS

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*Personally I'm always ready to learn, although I do not always like being taught.—Winston Churchill,  
British prime minister*

Every marketing person will tell you that customer interviews provide deep insights on the product, its promotion, your sales team effectiveness, and your company strategy. What they often fail to do is explain, exactly, how to conduct an interviewing program.

You'll be amazed at how much information clients will share—if only someone cares enough to ask. If you want to know what customers are saying, just ask 'em! But don't think of it as research; think of these client interactions as conversations.

# 1.

## PREPARING

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*We start with the customer and we work backward.*

*We learn whatever skills we need to service the customer. We build whatever technology we need to service the customer.—Jeff Bezos, founder, Amazon.com*

## WHY YOU SHOULD INTERVIEW CLIENTS

Who better to tell you what you do right and wrong than a customer or a lost client?

Client discussions reveal their problems but also yours: problems with your product, your promotion, and your selling approach. Clients will tell you—in their own words—ways to improve every step of your product development and delivery. And this information is highly valued within your organization.

This is the essence of market-driven customer development: let market facts drive decision-making.

In fact, executives and colleagues are desperate for relevant market facts. Consider the danger of decisions made based on one conversation or based on opinions. Client interviews greatly reduce the risks to your business.

# WHO TO CONTACT

To do client interviews, obviously you'll need contact information: names, emails, phone numbers. You'll want to reach customers who have recently purchased your product plus clients who didn't. Also, try to contact customers who purchased your product but didn't choose the support options or didn't renew their maintenance agreement.

How many client names do you need? For existing customers, you probably need 2 or 3 contacts to get one interview. From a list of lost customers, you'll likely need 5 or more contact names to get one interview.

And this is often the most difficult part of any research project: getting the names. Sales and marketing teams are often reluctant to share client names, and your customer system may not contain valid information. You may need to elicit the aid of sales and marketing management for getting valid contact information for this project.

# WHEN TO CONTACT

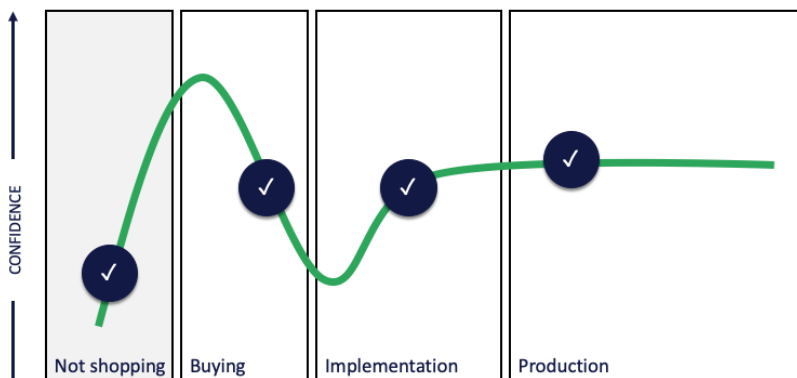
*You only learn where a product needs improvement through serious long-term use.—Dave Winer, industry thought-leader, software developer*

Every sales person will tell you there are times when it's dangerous to contact a client. In particular, it's especially problematic to contact a client at any time during the sales cycle. But when is the best time?

Every client rollout is different but you typically see clients go through phases of acceptance and confidence in their decision.

Gartner describes these phases in its popular "hype cycle" diagram. While they use "Visibility" of the project (that is, visibility within the organization) for the vertical axis, for our purposes, a better label is the customer's confidence in the

project. First you have the “peak of inflated expectations” when the client hopes the product will magically solve all their problems—just like the sales people said it would. Next you can see the “trough of disillusionment”—the period of buyer’s remorse that occurs after the sale. Luckily, as a successful implementation progresses, the client’s confidence increases.



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You want to avoid calling clients at the low points, particularly when they’re in the “trough of disillusionment.” I’ve noted four places on this diagram for customer calls, aligned with their phases of rollout: before they start shopping, just after the sale, after the initial installation, and after the implementation.

For information about how to improve your sales enablement and selling methods, interview a client within 4 weeks of the sale completion. This interview tells you mostly about how you’re perceived in the market since it’s really too soon to get detailed feedback about the product itself. You’ll learn about the alignment of buying and selling, the most (and least) effective sales tools, and comments about your sales team’s ability to connect with the client and respond to their information requests.

For information about the initial implementation of the product, conduct an interview prior to production rollout. You'll learn about the "gotchas" in your installation and implementation capabilities—both in your product and the associated services. You won't get deep product insights here because the client hasn't been focused as much on usage as much as implementation details such as configuration, data conversion, and modifying screens and reports.

After the implementation and prior to renewal is the best time for deep product insights, both the product capabilities and the impact of after-sale services, particularly technical or customer support. In this phase, you're looking for customer satisfaction. Will they tell their friends and colleagues? Will they renew when their subscription or license comes due?

The type of information you're seeking determines the appropriate time to reach clients in their implementation life cycle.

## THE INTERVIEW GUIDE

The big trick of interviewing is to compose a set of questions to guide your discussions. You don't want to wander aimlessly through a 30-minute conversation nor do you want to ask a bunch of closed-end survey questions that can be answered in a word or two.

Develop an interview roadmap to keep you on track and ensure that you've covered all you want to explore. 20 questions is a good target.

Here are the kinds of questions I like:

What do you hate about solutions in this space?

If you could design the perfect solution, what would it be like?

How would you improve the buying process for these things?

If you were searching for a solution today, what would you type into Google?



So take a moment to consider questions that will help reveal what you want to learn. Write them down, organize them into a logical flow.

See a [sample interview guide](#) in the last section of this ebook.

## NEXT STEPS

Who are you going to ask? When is the right time to ask? And what are you going to ask? These are questions to answer before you pick up the phone and start calling people.

# 2.

## INTERVIEWING

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*You will never find time for anything. If you want time, you must make it.—Charles Bruxton, British politician*

I tend to be fairly organized with my schedule. I like to set up calls at specific times so I'm prepared and engaged. Maybe it's anti-social but I rarely answer calls that come out of the blue.

It was once considered rude to send an email to someone you'd never met but nowadays people seem to prefer an email introduction before a phone call. I know I do. On the other hand, many still prefer a phone call prior to an email. After all, people are different! Let's combine these two into an appointment procedure that uses both effectively.

Adele Revella at the Buyer Persona Institute offers these suggestions for setting up an appointment for a client interview.

First, place a call to the person you want to interview. If they actually answer, ask if they have time for a short discussion. If they don't have time now, schedule an appointment for later in the week and follow up with an email confirmation. If you don't reach them at all, you'll either get voicemail or an assistant.

Create standard emails and voicemail scripts for each of these scenarios. (I've written some simple scripts to get you started. Download them [here](#).)

After an initial phone call, send an email either requesting the appointment or confirming the date and time of the

agreed-upon appointment. Include a calendar invitation in your email so they will put it on their schedule.

On the day of the appointment, send another email reminder so they'll be ready for your call; be sure to include the calendar invitation in your reminder message.

## BLOCK YOUR SCHEDULE

*If you don't make your own schedule, somebody else will. Then that person will control your work.—*

*Watts Humphrey, American software engineer*

For each scheduled interview, block an hour on your calendar. You'll need 15 minutes to prepare, 30 minutes for the interview itself, and 15 more minutes for wrap-up. And then do it all again for the next interview.

**Block 15 minutes before the interview.** Get yourself physically ready. Go to the washroom. Get a glass of water. Review the client info from your company databases and trouble ticketing system. Also check out their web site to be familiar with what they do. Get your head into the client information.

**Block 30 minutes for the interview.** An interview may take less time; it may take more. Plan on roughly 30 minutes. Never try to schedule an interview when your meeting schedule is tight.

**Block 15 minutes after the interview.** Before you talk to anyone else, you want to review your notes, expand on the areas where you've been cryptic or vague, and generally wrap up the interview. Remember, as soon as you talk about another client or another issue, you'll lose most of the information that you've kept in your head.

# RECORD THE CALL AND TAKE NOTES

*People tend to be more confident and more willing to state their opinions when they're talking on the phone.— Kristin Zhivago, author, Roadmap to Revenue*

I've found people are more forthcoming on the phone than they are face-to-face, particularly when they have something negative to say. You'll get loads of good information in a phone call so it's best if you can record the call. It saves you from having to write down everything while attempting to hold up your side of the conversation. A recording will make note-taking easier, especially for those great phrases you'll want to use as quotes later.

But for some reason, many who are new to interviewing are uncomfortable asking if they can record the call. Yet I almost never encounter an objection; those being interviewed rarely have a problem with it. Just ask: "Do you mind if I record this call? It will make it easier to take notes." Assure them you won't share the recordings with others.

When you're recording, make notes of time-marks you want to revisit. You'll want to look at these again later. Ideally, you'll want to get the recordings transcribed so you can scan the text quickly. There are many inexpensive services available and your company may already use a service.

If you can't record the call, you'll definitely want to conduct interviews with a colleague. They'll likely hear something you didn't and they can take more comprehensive notes than you're able to while you're concentrating on the discussion.

# THE INTERVIEW

*Customers will tell you things when being interviewed that they will never tell you while you are selling to them.—Kristin Zhivago, author, Roadmap to Revenue*

As with presentations, the first minute is critical. You have to prove you're not really trying to sell them something and you need to prove that you understand their issues. After all, we've all had to deal with call center people who are only following a canned script.

That said, memorize your first minute, using the voicemail and email scripts developed earlier as guides, so you don't fumble the opening.

You'll be following your interview roadmap but remember: it's not an interrogation; it's a discussion. Your roadmap guides you from topic to topic but you should feel free to let the conversation find its own path. Your clients may want to talk about their current issues so you'll need to let them express their thoughts.

The key to a successful interview is to avoid selling and telling. You're likely to hear the need for an additional option or service, and you'll want to offer it to them. Or you'll realize the client misunderstood a critical feature and you'll be inclined to explain it to them. But as soon as you start talking about your company and product, you'll lose them.

In particular, don't defend your product or your company reasoning. Decisions are made that affect some clients negatively. That happens. After all, you're not in the business of serving one client. For example, you dropped the basic support option because it was cost prohibitive. You may not even agree with the decision. But don't explain it or defend it. Your goal is to let the client express his or her frustration and then move on.

As much as we love to keep things digital, an interview is one place where you should take notes on paper. Don't let your technology get in the way. Print your interview roadmap so you can keep track of what's been asked and quickly spot the upcoming questions. Make it LARGE with lots of white space and narrow margins. Scribble notes, flag certain questions that you want to revisit, and even doodle in the corner if you want.

## **Remember this is a discussion, not a survey; give the buyer time to think.**

Ask a question and then pause for a 3-count. 1... 2.. 3.... For whatever reason, we seem to hate silence. A few seconds often feels endless. Just think of how frustrating it is to talk to teenagers; they ramble on at very high speed while you're still trying to figure out how to reply to a question from 30 seconds ago (or is that just me?) Give your buyer time to think.

Finally, avoid using your cell phone or a Bluetooth headset. A good old-fashioned landline (and a good, wired headset if you like) gives much better reception. I've had numerous phone conversations with such poor quality that I wasn't able to hear the questions and comments clearly so I just cut the conversation short.

## **FAVORITE QUESTIONS**

*The first answer is the one you already know.—*

*Adele Revella, founder, Buyer Persona Institute*

You're asking questions and getting some good answers. That's great. But sometimes you'll get a partial answer or a "soft" answer and you'll want to ask the question again. "Tell me more" is a fine prompt to get more specifics. However, you can't use it after every question so here are some good alternatives to extend the subject:

"Can you elaborate?"

“Could you give me an example?”

“Can you explain that again differently?”

“Of all the things that went on, why did that stick out in your mind?”

Now it's time to start wrapping up. You've been on the phone for 20 minutes or so and you've covered most of the questions you wanted to ask. Before you sign off, add one or more of these:

“What else do you want to share?”

“What should I have asked that I didn't?”

“If you were sitting down with our CEO, what would you want to say?”

## NEXT STEPS

*However beautiful the strategy, you should occasionally look at the results.—Winston Churchill,  
British prime minister*

Sometimes it's better to think of yourself as an agency rather than an employee. Don't admit to having access to any company systems. That is, don't look up their client history or trouble tickets for them; you don't want to turn an interview into a support call. Instead, tell the client that you'll notify the appropriate department who will do the follow-up.

Never give any client-specific information to your colleagues unless the client approves it. If there were any sales or support issues, ask the client if you can send the information to sales or support. Most clients will be glad to have you forward their information, and all clients will appreciate that you asked before doing so. Send the information (now, before you forget) to the appropriate department.

Immediately after the interview, take a few minutes to review and expand your notes. Then take a few minutes to compare your notes with those taken by your colleague.

Don't jump into another customer issue or you'll forget some of the nuances from this conversation.

And take a moment to reflect on what you've learned. Pat yourself on the back for completing a successful interview. Take a short break and then do it all again.

Once you have a few interviews, you'll begin seeing some trends and then you're ready to start analyzing for patterns. And that's what we'll do next.



# 3

## ANALYZING YOUR INTERVIEWS

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*The customer is a rear-view mirror, not a guide to the future.—George Colony, Forrester Research*

**Look for patterns.** The key to getting insights from what you’ve heard is to look for the patterns. Before using any of the techniques below, review your notes and transcriptions, and perhaps listen to the recordings again. Discuss your impressions with your interview buddy. What areas are you hearing again and again? Are you hearing problems or recommended solutions? What are the root causes of what you’re hearing?

**Tag clouds.** One super-easy technique to get you started is word clouds (also known as tag clouds). Paste all the transcriptions into a cloud and see what words jump out at you. The size of the word indicates its frequency. In this case, we’ll want to look more closely at phrases that include the words clients, customers, market, information, and management.

**Highlighters.** Freshman seminars in some colleges teach a method for using highlighters that I’ve adapted for “data mining.” Scan through your transcripts and use four colors to note information:

Yellow: general insight

Green: positives

Red: negatives

Blue: competitive information

Sometimes one comment is enough to cause you to take action. For example, “I got a 404 page when I clicked on the

link.” You don’t need any more instances of this situation to go fix the link. But usually you’ll need three or four—or ten—requests before you should propose an action. If one person says your monthly support costs are too high, that’s interesting. If ten more say it, it’s worth exploring further. Maybe you should consider multiple levels of support. Or expand the online support area to include clients-helping-clients. Or maybe your premium support really is too expensive for a significant portion of your clients.

You have a hypothesis now: “support may be too expensive.” Interviews are great for identifying issues but not very good at quantifying them. You’ll want to conduct a survey of a few hundred clients to see how many want to continue at premium and how many would entertain a less expensive option.

## **COMMUNICATING WHAT YOU’VE LEARNED**

I’ve found that marketing people are not very good at marketing themselves or their information. In general, they present data and assume that others can draw their own conclusions. But not everyone can look at a blueprint and see the finished building.

Who needs the information you’ve discovered? And what action should they take? You’ll need to think of how your audience processes information and what form is most persuasive, particularly when you’re asking them to change their point of view.

I once shared the results of a survey for a new product concept. And the results were not very good. In fact, they were really bad. On average our customers gave us a very poor grade on every aspect of the product. My VP of Development wanted to see the individual responses. When I shared them, I watched in surprise as he mined the data in real time. It was like watching Commander Data on Star Trek: The Next Generation as he scanned volumes of information. His eyes flicked across the screen and you could almost hear his mental gears thrashing. And he reached a different

conclusion. “Yes, the overall responses are bad but the newer responses are better.” (Do you remember the joke about the little boy who wanted a horse? Punch line: “There’s a pony in here somewhere!”)

Technical teams tend to want the raw data so they can draw their own conclusions while marketing people prefer key insights that provide guidance on the personas and positioning and messaging. Sales people don’t trust data as much as their own intuition, so they want to hear stories about individual clients, in the clients’ words.

And perhaps the biggest challenge for product managers and marketers is “speaking truth to power.” When speaking to the leadership team, particularly when the conclusions aren’t favorable, we tend to soften it with generalities. Executives want a summary of your conclusions and specific recommendations to address the issues you’ve discovered.

When presenting your information, the medium needs to align with the message. Use a report or spreadsheet when you need to provide detail. Tell a story about an interview that best represents your conclusions—with the name of the person, their company information, and quotes from the interview. Always end your discussion with a conclusion and a recommendation but feel free then to open up the session for alternative conclusions and recommendations.

PowerPoint is a fine tool to get you started but it isn’t the right tool for every audience. Use a report when there’s lots of information to consume. Use a presentation to share summary information. Tell a story to bring the data to life.

## FINAL TIPS

Now you’re ready to begin but before you contact a client, do some “deliberate practice.”

Start with a role-play with someone in sales or customer support. You’ll want to try out your opening, and get practice asking questions and probing for answers. Then get feedback from your colleague about what you could improve.

You'll notice some things that you need to tighten up or revise. If nothing else, this role-play will build your confidence.

Next, interview a friendly client. Someone you know personally or at least someone who has a positive relationship with your company. Be honest about what you're doing. "I'm interviewing clients and I'd like to start with someone who will be nice to me."

After a few practice interviews, you're ready to start calling more people. The more recent their experience with your company, the easier they'll be to reach; and they'll also provide more valuable information. Who better to tell you what you do right and wrong with your product than someone who recently chose to buy? Or someone who chose not to buy? Recent wins and recent losses are the best sources for insightful interviews.

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# 4

## YOUR INTERVIEW GUIDE

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*Adapt this guide for your organization and products. Be cautious not to add too many questions—you don't want it to become a survey; it's a guide to a series of discussions.*

### Introduction

Hello. My name is <name> and I'm one of the product people here at <organization>. I'm not selling anything. A small group of us are researching our market to learn about how folks like you approach <product category>. It's one way we validate our product plans.

I'd like to record this call so I can focus on you and not on taking notes. I won't share the recordings with anyone outside my research team. Is that okay? [NO | YES > Begin recording]

I have a number of areas I'd like to explore with you, mostly about your products and your customers. But this isn't a survey; let's just have a discussion.

### First let's talk about you and your company.

1. Tell me about yourself and your role.
2. Tell me about your portfolio of products.
3. What markets do you target with your products?
4. How do you expect your market to change over the next few years?

## **Let's drill down on your products and your customers.**

5. Who are the typical end-users of your products? and what are some common problem scenarios?

6. Tell me about a project you're working on that involves <category>

7. Take us through your thought process on selecting products? What is the scope? That is, how many projects are in flight at any time? How big are these projects? [# of designs; # of units]

8. Tell me some of the problems you've had on previous projects

## **Okay, let's switch gears here and talk about vendor selection.**

9. Tell me about your ideal vendor [products, services, capabilities]

10. Which vendors do you rely on for your designs today?

11. What parts, products, or services are your regular vendors missing?

12. Have any of your past products had less than expected performance or range? Do you know the cause? How did you correct it?

## **We have just a few minutes remaining so let's talk specifically about my company...**

13. What do you know about us?

14. Here's a high-level view of our roadmap. What are we missing?

15. If you had the ear of our company president, what would you say? [Walk through each of the major departments or functions—Engineering, Marketing, Sales, Services, Support]

# ABOUT THE AUTHOR

Steve Johnson is an author, speaker, and product coach focused on implementing modern methods that move products quickly from idea to market. His approach is based on the belief that minimal process and simple templates result in a nimble product team.

Steve's work experience includes technical, sales, and marketing management positions at companies specializing in technology-based products. His market and technical savvy allowed him to rise rapidly through the ranks from product manager to the executive suite. In his career, he has launched dozens of products.

Steve was a long-time instructor at Pragmatic Institute and co-creator of the popular QuartzOpen framework.

Nowadays, Steve works as coach and advisor, helping teams implement best practices in product management and marketing.

Steve's book, ***Turn Ideas Into Products***, describes a nimble planning process from idea to market. Learn more at <http://www.under10consulting.com/books>

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