

Asking the Right Questions

Get the most out of your client meetings with these tips & questions.

Tips

1. Conduct research in advance to get to know your client's business and industry. Equip yourself with some recent news, business performance, and points of interest that will contribute to the conversation.
2. Be yourself. Build rapport quickly, ask them about themselves and be sure to listen attentively.
3. Challenge their responses, find their passions, get a sense of what they're willing to fight for.
4. Ask open ended questions, don't lead them.
5. Hone in on the details, listen closely and follow themes until you have all of the answers you need.
6. Don't sound scripted, let the conversation flow. Return to your questions when you've followed a theme all the way to its conclusion.
7. This is a conversation, not an interrogation. Keep your tone friendly and make them feel safe telling you everything they know and don't know.
8. Any question is valid. They are the experts on their business, you want to know everything they know. Curiosity is key, find the truth, and take notes!

Introductions

Tip: Be yourself, you are building a relationship based on trust & honesty.

- Have everybody introduce themselves, their role and relevant experience or interests.
- Ask about them, what excites them about this project, build rapport.
- What is the main reason you wanted to work with us?
- Explain our goals and why we are doing this: In order to understand their business, identify the problems we're trying to solve, and how we'll measure success for this project.

Business Fundamentals

*Tip: Even if you aren't dealing with the owner of the business, always refer to the business as theirs. Inspire their ownership in the business and this project. ie 'Who are **your** customers?'*

- Why does your company exist, what is the purpose of your business?
- What does your company do?
- What products, services, do you offer?
- Who are your ideal customers?
- How do you reach your customers, what are your channels?
- How do you track your customer's experience today?
- How does your business make money, what is the model?
- What is unique about your business, why should customers choose you?
- Does your company have an unfair advantage in its market?
- Who are your competitors?

- Who are your inspirations?
- What are your company's key metrics, what does it track?
- What is your number one priority for your business this year?
- What needs to be strengthened in order to achieve this goal?
- What steps have you taken towards this goal so far?
- Is there anything that may get in the way of achieving this goal?
- What has changed or is changing in your industry?
- How large is your company, employees, revenue, customers, etc.
- How is the company structured, who are the people, departments and scale?
- What are the long term goals of the company?

Project Goals

Tip: Figure out what makes this project important to their business. If it's not core to their business today, project how it could be, and how we could improve other parts of their business in the future.

- Why are you doing this project, what is the goal?
- What is it worth to your business to reach this goal?
- Who first asserted the need for this project?
- Why now?
- What secondary benefits can be gained through this project, what are they worth?
- What else needs to happen for this project to be a success?
- What is the timeline and why was it made?

- What is the outcome you are expecting?
- How will you track or gauge success of this project?
- What are the risks with this project?
- What are your expectations of our team?
- Have you done a project like this in the past, how did it go?
- What was the most successful project of this kind in recent memory at the company?

Client Communications

Tip: Try to understand what your client is excited about, and what their goals are. Empower them to achieve success for themselves and their business.

- What is your role at this business?
- What are your goals at your job?
- What is your role on this project?
- How do you feel about this project?
- Who is making the final decisions on this project?
- Who will be in charge of implementation of this project?
- Who are the other stakeholders, how will we work together?
- Have you worked on something like this before?
- Have you worked with a design team before?
- What level of collaboration or involvement are you expecting?
- Can we share work in progress and other learnings on social media platforms and communities?

Final

Tip: Summarize, in your words, your learnings from each section as you complete it. This will help validate or correct your assumptions, and also help you remember what they've said.

- Can we get access to analytics or be taken through them?
- Is there anyone else I should be talking to?
- Plan to follow up, if necessary.

What if?

The interviewee is scared?

1. Tell them you are speaking to others not just them.
2. Ensure confidentiality.
3. Prime them by giving comments from other people.
4. Focus on the existing processes not the solution.

The interviewee is a jerk?

1. Find out if you even want to continue.
2. Try and reschedule, we all have bad days.
3. Figure out if they don't trust you.
4. Figure out if they are a hater of the project.
5. Let them vent, at least you heard them.

Too many interviewers?

1. Select a leader interviewer in advance.

No more questions to ask?

1. Wrap it up, summarize your comments and ask if you didn't cover anything.
2. Ask if they have questions for you.

Cannot remember what was said?

1. Write down their answers asap!
2. Ask them after the interview if you can reach out again if need be.