

Customer Interview Guide

Before the meetings

- Check someone else hasn't already spoken with them (innovation, sales, ops, mgmt)
- Frame the conversation (i) what's our company mission, (ii) our mission, (iii) the help we need, (iv) why they are the best person to help, (v) what's in it for them.
- Define the 3 main areas we need to validate on the call beforehand and focus on that
- Offer a gesture of goodwill (\$50 voucher or equivalent within company policy)
- Define when and how we'll follow up (immediately afterwards with a thank you, 7 days later with a 'learning' to share)

The Mom-Test reminder

1. Talk about their life instead of your idea
2. Ask about specifics in the past instead of generics or opinions about the future
3. Talk less and listen more

Avoid

- Opinions: What do you think about our idea? Fishing for compliments.
- Generics: What do you usually do? Likely to get fluff.
- Hypotheticals: Would you? Could you? Their guess is as good as yours.

Instead

- Previous behaviours: Talk me through the last time this happened.
- Dig deeper:
 - Why does that matter?
 - Was that frustrating?
 - Tell me more about that?
 - What makes you say that?

- What was the last time that happened?
- Can you help me understand the thinking there?
- Did you consider other options?
- What else?

1. Potential buyer questions

Before the call: List out 3 main areas that we want to test or validate and decide which questions to ask and which to leave out.

The role

- Tell me a little about your role and how it fits into the wider organisation
- How long have you been in the role?
- How did you end up in this role?
- How many people are in your team?

Where she spends her time

- Where do you spend your time on a typical day?
- Is last week a good example of a typical week?

Existing use of technology

- Do you use any online tools today? Any specifically for [___key activity]?
- Why haven't you used any in the past?
- What has happened to trigger the interest in these tools?
- How do you know whether [___target results]?
- What's working well?
- What do you find frustrating about them?
- Are there any products that you tried and stopped using? Why?

Key challenges

- What are your 3 biggest challenges that keep you up at night today?
- Tell me more about it?
- Are they getting better or worse?
- Did anything change recently to make them worse?
- What do you see as the key needs for your company?

Likes and dislikes

- What do you like most about your role?
- What is your least favourite part of the job?
- What else?
- When did you feel most proud in the last month? What happened?
- Do you feel the wider company understands wellbeing?
- If not, can you give me an example of when you felt misunderstood?

Goals and measurements

- Who do you report to and what do you report?
- Do you have any KPIs for [___key activity]?
- How often do you measure them?
- Do you manage a budget?
- How does that work?

Existing process for [___key activities]

- Could you walk me through how you do [___key activity] today?
- Which was the [___key activity] you implemented?
- Walk me through how it was implemented?
- What get the best results?
- How do you know?
- What doesn't get results?
- What went wrong?

Trends

- What do you see as the key trends in [___key activity] today?
- What would change the game?

2. Existing buyer interview questions

Before the call: List out 3 main areas that we want to test or validate and decide which questions to ask and which to leave out.

1. What are your top 3 challenges in your role as 'job title'?
2. How did you find out about Vitality Works?
3. What specifically made you give Vitality Works a chance?
4. What is the primary benefit that you receive from Vitality Works?
5. How would you improve Vitality Works to better meet your needs?
6. What would make you stop using Vitality Works in the future?
7. What would you likely use as an alternative if Vitality Works were no longer available?
8. What type of organisation would best benefit from Vitality Works?

3. Existing end-user interview questions

Before the call: List out 3 main areas that we want to test or validate and decide which questions to ask and which to leave out.

As for potential user plus:

Last Use

- When did you last used [product]?

- What did you do on [product]?
- How long ago was it?
- Why did you decide to use it?
- What decisions had to be made (by whom) internally for you to use it?
- Could you walk me through the process?
- What was the most frustrating part of the process?
- How would you measure the value of [product] versus not using [product] in that example?

General

- How did you discover [product]?
- Did you consider any alternatives? Which ones and why [product]?
- Have you recommended [product] to anyone in your professional network? Who?
- How would you describe [product]?
- Is [product] better for large companies or small companies?
- Would you continue to use [product]? Why?

4. Marketing persona interview questions

Demographics

- Company Name
- HQ Location
- No. of employees
- Name
- Position
- Tell me a bit about your division

Your Position

- What's your goal?
- Key challenges affecting your business?

- Best part about their job
- Worst part of their job?
- What creates urgency in their work?
- Use of technology
- How do you bring in new business?
- How many projects at once? Steady state or peaks and troughs?
- Do you need to have qualifications?
- Hardest thing about getting qualified.

Beliefs

- What does it take to be successful in your industry?
- What do newbies take a long time to appreciate fully?
- How do you create a good reputation?
- How did you get to where you are today?

Values

- What was the last hard decision you had to make?
- What made it hard?
- Are you happy with the outcome? Why?
- What makes you feel most proud at work?
- What do most people misunderstand about what you do?
- [Which division gives you the most kudos at your company?]

Media

- What publications are most relevant to your work?
- Who are the thought-leaders in your industry?
- What are you interested in reading about?

Big Win

- What was the last big milestone / big win / success story that happened in the business?

- What happened?
- What does this mean for the business?

5. Missed sale debrief

- What caused other firms to be eliminated prior to the final round?
- What qualities put us in the finalist round?
- What qualities were "a draw" between us and the winning company?
- Have you done any other work in the past with the winning company?
- Were there any parts of our proposal that were confusing?

After hypothesising the 'real' reason..

- Were there companies that [satisfied the potential reason] and weren't selected? Why?
- Why did [the 'real' reason] matter to you?