

Customer Interview Cheat Sheet

How to interview your customers and create lasting impact from the results

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“Anything that Does not Come from a Customer’s Mouth is Nothing More than an Educated Guess!” - Steve Rankel, Head of Customer Insights at AppFire

The reasons your C-suite thinks your customers buy and the reasons your customers actually buy are almost never the same. Following this guide will help you prove that and provide insights across the company that will get the attention and respect of your executives, and help you drive a better customer experience.

Why this works: Rapid Framing

Rapid Framing is a neurolinguistic technique that taps into the brain’s limbic response system – by giving structure to answers but room for creative brain activity and response. You are basically tapping into our human “you can’t forget a question” ability but offering a big box to answer.

Instead of asking “Why did you buy this product?” you’re going to ask **“Tell me the top 3 reasons you purchased from us, instead of any other vendor, including the option of doing nothing!”**

By asking someone this you set their brain up to:

- Stack rank, in priority order, what is most important for YOU to emphasize when you sell
- Remember only the key things that moved them to buy, and more specifically, got them to take ACTION!

Getting Started

- **Which Customers to Interview:** Find out what your company’s strategic initiatives are. The ones that keep your CEO awake at night, and that all teams are focused on driving. The initiatives the board wants to hear updates on. Most initiatives will focus on one of the following use cases, keep in mind it only takes 7 to 10 customer interviews to start establishing meaningful patterns:
 - Net New Customer Acquisition: Clients who have JUST purchased or implemented the solution if your focus is to create marketing materials for driving prospects into the top of the marketing funnel to drive net new customer acquisition. This means customers who are freshly signed who will remember the buying process well, not just ‘referenceable advocates’ who are 1-2 years in with your company
 - Product Expansion: Cross-sell, upsell, migrations: Identify clients who have made it on the other side of a migration or who you’ve successfully completed a ‘land and expand’ campaign with where they started with a single product and graduated to a platform. Ideally folks who were hesitant beforehand as they will have the best before and after stories. Your CSM team or existing accounts sales team should know of folks who fit the bill.
 - Innovation: If your company is looking to create new products, expand use cases, or drive product improvements, seek out your visionary power users. Those who understand the landscape of your space, but who are also practitioners with a deep understanding of the product. These folks may be highly active in support deflection communities or your product team’s inbox, always suggesting enhancements
 - Retention & Renewals: Seek out the friendlies who provide best practices to other customers in peer-to-peer communities or at your events, and those who are aligned to your company values. It can also be powerful to ask sales about a particularly tough renewal and interview those clients because

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- they'll be able to articulate how your company helped them overcome their fears, uncertainties, and doubts. You don't need to speak to your client who has been through the most renewals, it's better to speak to those who have been through the toughest. Your CSM team or existing accounts sales team should know of folks who fit the bill.
- The approach:
 - It's critical to frame this conversation with the customer in a way that emphasizes gathering feedback and **perceptions from the individual**, not "what your company thinks about working with us" which will cause them to immediately check with legal or worse... never respond to your request at all.
 - Sample Template to gain Customer Participation:

Hello,

I'm with the ____ team at ABC Company. In our efforts to ensure the best possible experience for our customers, I'm in the process of gathering candid feedback from a few of our customers, and ____ [INSERT a name the client is familiar with like account owner/CSM] mentioned that you have an insightful perspective.

Would you be open to chatting for 25-30 minutes?

[NOTE: If your company does have a budget to allocate towards gifting, we'd recommend no less than \$25 no more than \$100 and if you're reaching out to a director level or higher, I would recommend offering a *donation* on their behalf to their favorite cause so that they don't perceive this as a bribe. Most gifting platforms can accommodate this.]

In exchange for your generosity, we would like to donate \$100 to your favorite cause.

Thank you,

- Do not send a questionnaire ahead of time - have a conversation. The more conversational your interview is, the less customers feel like they are being grilled. If they request the questionnaire, say "I'm really just looking to have a candid conversation with you about these themes: product strategy, onboarding experience, future goals" These are example themes, just keep it very broad so they don't come into the conversation with a script!
- Capture your stakeholder's hypotheses on how the clients will answer these questions before capturing the customers' responses to show the contrast. Otherwise, your execs may hear the results and say "Right! Exactly what I said!" When in reality there will be a contrast

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Interview Tips

- Set Up:
 - Set up 30-45 minute calls on Zoom or a service with recording. Riverside FM is a service with free versions that records in HD, so the quality is higher than that of a Zoom call.
- Create distance:
 - “Assume I know nothing” or else the customers will not articulate the same amount of context, which is where the ‘golden nuggets’ really come out
- How to ask permission to record:
 - “I would love to be very present during this meeting, and although I’ll be taking notes, I want to make sure that I don’t miss anything you have to say, are you ok with me recording? I promise nothing you say will appear on the news before 11pm tonight...” If they say no, push for audio only. I’ve never met someone to say no to that, but if you do, just do an abridged version of the interview (aka don’t waste your time, but don’t offend them)
- Call Hygiene:
 - Mute yourself after every question for the remainder of the time they’re speaking. Even once they stop, stay on mute for a few seconds, people will often keep talking if you do this and will reiterate a point in a more clear way. At first during the pause, they may say “hello? Are you still there?” Just tell them you’re taking notes and apologize if it takes a moment to come off of mute, they’ll only ask once. DO NOT INTERRUPT!!! You might be tempted to jump in, but you’ll ruin their flow and might miss some of the best insights.
- Call flow:
 - Start with open ended questions to warm up (“Tell me about your role at your company” “How did you get into this line of work?”), lead into rapid framing then go for the jugular (aka “what has been the impact of working with us?”)
- Actionable Insights:
 - Transcribe your customer interviews, send them to your video team to carve up into snippets. These audio and video snippets can be turned into marketing materials, sales enablement materials, and will really help make the points your clients want to get across to leadership through the inflection in their voices without you needing to ‘call the baby ugly’ to your CEO.
- Analysis:
 - Look for patterns (and surprises) in the results. Once patterns emerge, create a category in a spreadsheet and add all the quotes that support that pattern, this will enable you to turn qualitative data into quantitative insights. If you’re struggling to see the patterns, reach out to kaily@slapfive.com for further guidance
- Action:
 - SHARE! If a tree falls in a forest but nobody is around to hear it, did it actually fall? These insights are only powerful if you take action and share them with the teams in your org who may be impacted. Create a specific deck for product, CS, Sales, Leadership. Share direct quotes, your analysis, and how the clients’ language differed from the leaders’ hypotheses going into the project.

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Sample Interview Questions:

1. Tell me about your role and your company
2. What was going on in the business that caused you to reach out to ABC Company originally?
3. After you signed with ABC Company, what happened next?
4. Is there anything that the onboarding/CS team could have done differently?
5. Is there anything that has surprised you in a positive sense about working with ABC Company?
6. What are the top 3 reasons you bought from ABC Company instead of anyone else, including the option of doing nothing?
7. What are 2 ways life (or your role) is different for you now than before you implemented our solution?
8. [Use Q's 8-11 if you are building out your advocacy program or want to better understand how to create a 2-way exchange of value in your existing program]
We're considering creating an advocacy program where you can learn thought leadership from experts in the field, meet your peers, engage in community discussions... What are the 2-3 things our Customer Advocacy program would need to include to ensure you'd receive enough value to participate? [provide examples: speak at events, speak with industry analysts, gain access to our executives]
9. What benefits would you or your team want to gain from participating in the program? [Access to executives from your organization, priority access to beta programs, peer-to-peer networking opportunities, speaking opportunities]
10. What are the best ways for us to communicate with you? (channels- email, slack, webinars, peer-to-peer destination site)
11. What has been your favorite experience participating in a customer program?
12. What are the top 2-3 challenges you face in your role on a day-to-day basis?
13. Is there anything we can provide support or content-wise that would help you in your day-to-day?
14. You provided some wonderful insights that I think could really benefit some of our other clients in your shoes, would you be open to being quoted?
[Alternative: Just approach after-the-fact with nice recorded snippets and ask to quote then]

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If you have a question or want more tips on HOW to use these questions and insights,
Get in touch with kaily@slapfive.com