



Customer Interviews

WHAT YOU'LL FIND IN THIS DOC:

- Email Templates for Interview Invitations
- 15+ Questions for a JTBD Customer Discovery Interview
- Sample Script for a Customer Interview
- 15+ Questions for a JTBD Customer Research Interview
- 5 Key Questions for a JTBD Customer Research Survey

This document represents the approach and actual questions some of our favorite JTBD experts use as the foundation of every customer research interview.



The goal of Jobs-To-Be-Done (JTBD) interviews is to be able to outline the timeline and steps someone goes through from becoming aware they have a problem to solve; to deciding to solve that problem; to deciding to use your product. Along the way, you'll uncover anxieties, motivations & situations that lead to action or inaction as it relates to a particular struggle in your customer's life.

Typical interviews can vary in length, but we suggest starting with half an hour. If the person is an eager participant, you can always ask to extend.

We'd also recommend checking out this handy guide to [using open-ended vs. close-ended questions](#), to get a sense of what questions to avoid as you begin incorporating this style of customer interview into your process.



Email Templates

Invitation for Customer Discovery Interviews:

Hi <Name>,

I'm reaching out to a few <job title/user type> to get a stronger sense for how people like you are solving for <process your product/service solves>.

Any chance you'd be up for sharing your experiences solving for <customer struggle>? It'd be a quick 30-minute chat. :)

If so, feel welcome to name the easiest time here <insert link to your scheduling tool, if you're using one>, and I'll give you a call then.

Thank you so much!

<Your Signature>

Invitation for Customer Research Interviews:

Hi <Name>,

I'm reaching out to a few of our power users to get a stronger sense for how people like you are using <product>.

Any chance you'd be up for sharing your experiences using <product>? It'd be an easy 30-minute chat. No trick questions :)

If so, feel welcome to name the easiest time here <insert link to your scheduling tool, if you're using one>, and I'll give you a call then.

Thank you so much!

<Your Signature>



JTBD Customer Discovery Interview: 15+ Questions To Ask

Ready to discover who your ideal customers are? This list is for interviews with people you suspect will want to use your product/service.

1. What's your role at your company (job title, primary responsibility, etc.)?
2. What are the most important success metrics you're measured on?
3. Walk me through your most common workflows and where you encounter the most struggles?
4. What tools have you tried to solve for these?
5. If you weren't using any other tools, how did you typically <get this job done>?
6. Tell me about that. What worked well, and what didn't?
7. What would have to happen to compel you to look for something different?
8. When you have decided to try new solutions in the past, how much research did you do to find the right one for <company>?
9. Do you recall how you found them?
10. How did <the current solution> come into the picture?
11. What made you interested in trying it?
12. Were you the only one on your team looking for something else at the time?
13. What happened when you tried <product> that convinced you it was the right choice?
14. What were you skeptical of or concerned about during the trial process?
15. What would have made you say "No, this isn't for us"?
16. How does solving for this make your life better?
17. What's the big problem you still need solved?

**Note: these questions are written for conducting research on B2B products -- but can easily be adapted to fit B2C, as well.*



Need A Scripted Approach?

We also recommend this script template from Michele Hansen, author of [Deploy Empathy](#), for anyone not comfortable with a JTBD style of interview yet.

Opening Questions:

- Before we get started, I just wanted to ask if you had any questions for me?
- [Optional: if you're recording] Oh, just before we get started, is it okay if I record this interview? It's just so I can listen to what you're saying and don't have to be scribbling notes the whole time. It won't be shared outside.

"Meaty" Questions:

- Alright, to get started, can you just tell me a little about how you got to needing something for <process your product/service solves> in the first place?
- Can you walk me through what the end result you're trying to get to is?
- What other tools or things have you done manually to try to do this?
- Can you tell me about when you started thinking that maybe you could or should use something else to get this done?
- When was that?
- So when did you start looking for something new to <solve problem>?
- Before you started using <product>, what were you hoping it would solve?
- Is it helping with what you hoped it would help with?
- Before you started using <product>, was there anything you were unsure about or nervous about?
- Before you decided to use <product>, was there anyone else you asked about it or places you looked for information about it?
- Before you decided to use <product>, were there any other alternatives you looked into?
- Before you decided to use <product>, was there anyone else who needed to weigh in on whether it was the right fit before you could use it?



The “Reaching for the Door” Question:

After you’ve covered the above and feel like you have a good grasp of the timeline (roughly halfway through the time you’ve told them this interview will take), wrap the interview with this last question to give ample space for the great stuff that usually follows.

- Thank you so much for taking the time to talk to me. I’ve learned so much from you today. Is there anything else you think I should know?



JTBD Customer Research Interview: 5+ Questions To Ask

Ready to conduct marketing research on your best customers? This list is for interviews with people who have started using your product/service within the last 1-3 months.

The goal here is to talk to people who have already started using the service and are successfully set up so you can dig a level deeper into why it is they started using your service.

**Note: these questions are written for conducting research on B2B products -- but can easily be adapted to fit B2C, as well.*

1. Now that you're using <product> regularly, what are you able to do that you weren't before?
2. What features could you not live without?
3. How do those features make your life better?
4. Tell me about a time when you got surprising results or found unexpected value.
5. As <job title/role>, how has <product> changed the way your team works?
6. How has that impacted your team's goals or performance?
7. Can you think of any concrete examples of times this has happened?
8. What's the big problem it solves?



JTBD Survey: 5 Key Questions To Ask

Need a higher *volume* of customer responses than interviews allow?

Consider sending out a survey to complement your interview insights. While surveys won't provide the in-depth, layered *detail* you'll get during interviews, you should see a higher *number* of customers complete them.

This will help you identify which details from your interviews stand out as *actual patterns* across a larger percentage of customers.

1. Before <product>, what tools were you using to <do the thing your product does>?
2. When did you realize you needed a tool like ours? What was going on in your world that caused you to start looking for one?
3. How did you find out about <product>, and what stood out / made you interested in trying us?
4. When you tried <product>, what happened that made you feel certain it was the right choice?
5. Now that you're using <product> regularly, what's the #1 thing you're able to do that you weren't before?

Sources/Further Reference:

[Customer Interview](#) by Michele Hansen

["A Script for Kickstarting Your Jobs to Be Done Interviews"](#)

The [Jobs to Be Done Playbook](#) by Jim Kalbach

[Interviewing Users](#) by Steve Portigal

[Jobs To Be Done Template](#) by Forget The Funnel

[Demand-Side Sales 101](#) by Bob Moesta

[Peloton JTBD Interview Sample](#) with Bob Moesta