CUSTOMER INTERVIEW

TOOL BOX

CUSTOMER INTERVIEW TOOLBOX

BEST PRACTICES FOR PRODUCT MANAGERS TO CONDUCT GREAT CUSTOMER INTERVIEWS

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INTRODUCTION

CONGRATULATIONS!

If you're reading this guide, chances are you've landed on the beginning of something big. You have an idea! Whether it's an idea for a new product, new feature, or a new company altogether, one thing is certain—the work has just begun, and endless discovery lies ahead. Realizing this, you deem it wise to enlist the help of current and (hopefully) future customers to validate the utility of your new idea (or prototype, or minimum viable product, etc.).

If you're new to the concept of validation, you're on the right track. Customers and potential users of your product constitute extremely valuable sources of insight. In fact, just about every form of business validation can be covered through customer interviews—from product validation, to market validation, to idea validation. The customer opens the floodgates to a river of information, littered with golden nuggets.
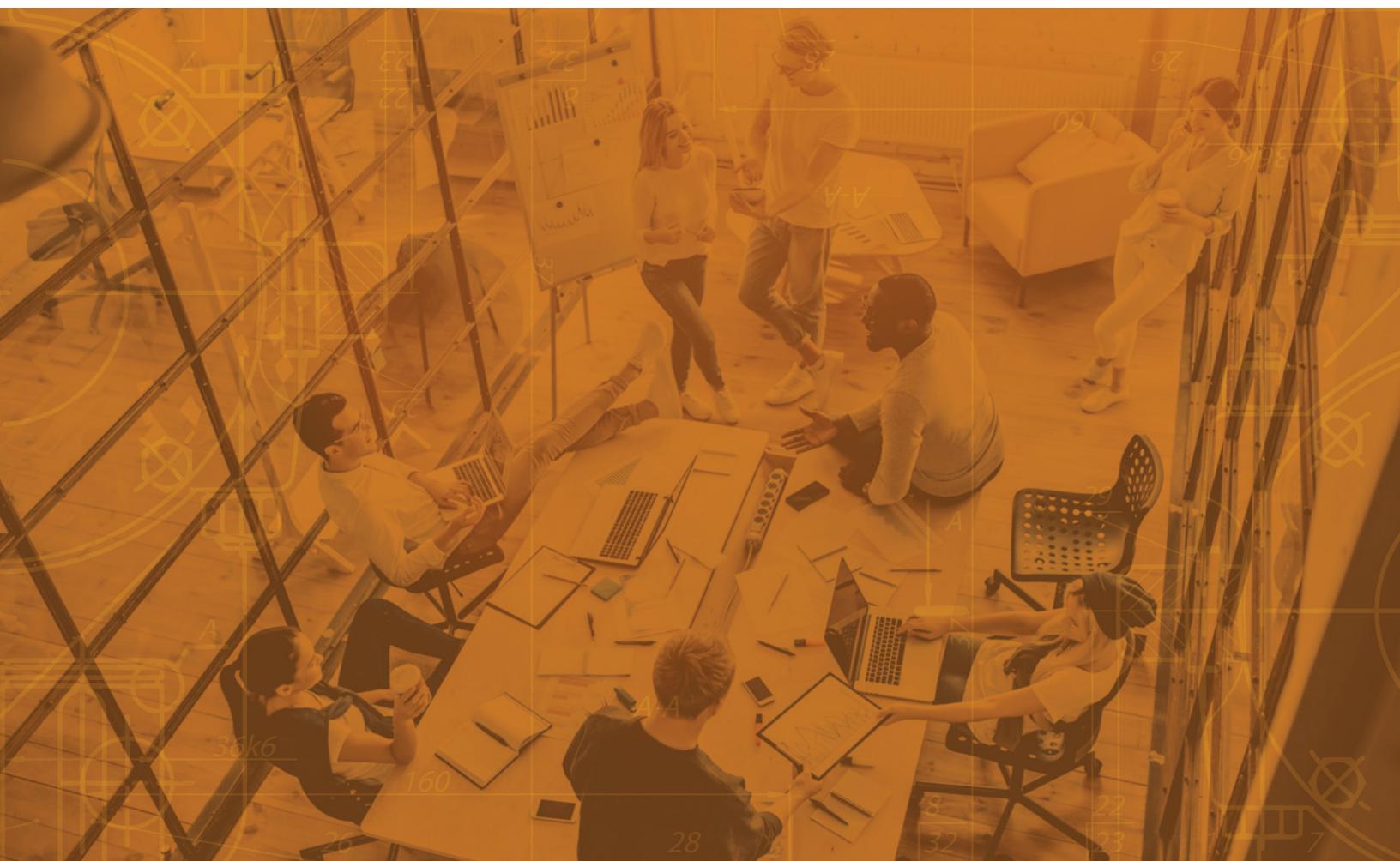
Note that this holds true for startups and established companies alike. Sure, the questions you ask prospects will change on a case-by-case basis, but the underlying process remains the same. Every idea has its audience. Every audience has its opinions.

So what exactly can customer interviews do for you?

For starters, the more insight you have from customers and prospects, the more fuel you'll have to drive informed product decisions. But it doesn't end there. Here are some key questions that customers can help you answer:

- Are we solving the problem the right way?

- Is our messaging effective?

- Have we prioritized the right initiatives on our roadmap?

- Are prospects ready to buy?

- How much will prospects pay?

- Can we achieve product-market fit?

- What's the minimum feature set required to generate sales?

The list goes on and on. Since we're just getting started, here's a good way to simplify things: **If it's an important business question related to your product, strategy, or bottom line, customers can probably help you answer it.**

BEST
PRACTICES
FOR CUSTOMER
INTERVIEWS

1 BEST PRACTICES FOR CUSTOMER INTERVIEWS

Customer validation doesn't guarantee success, but it's the easiest and lowest-cost way to reduce risk for new products. Interviewing customers may seem like an obvious win, but we've actually noticed many product teams let this initiative fall by the wayside.

By weaving customer validation into the fabric of your product discovery process, you'll be ahead of the curve. Let's start to get in the right mindset for effective customer interviews by reviewing some best practices.

1. START TALKING TO CUSTOMERS BEFORE YOU THINK YOU NEED TO.

Start interviewing customers as soon as you can hold a meaningful conversation about your product or idea. The sooner the better. That likely means coming up with some early hypotheses. What are you validating? What is the market? What is the target persona? Ideally you'll also have some early thoughts on pricing and customer acquisition.

Once you have those basic assumptions, you'll have enough to start talking with prospective customers. Your hypotheses don't need to be right. They just need to be concrete enough to tell you who to speak with, what their problems might be, and how your product or idea may address them.

2. MAKE YOUR INTERVIEWS LONG ENOUGH TO COUNT.

Interviews likely need to be at least 30-45 minutes to yield useful information. You need enough time to establish rapport and ask your initial questions, as well as enough time to ask the questions you hadn't thought about at the beginning.

The amount of time you spend often depends on the stage of customer validation you're in. For later-stage interviews where you may be proposing a potential solution, it's realistic to need up to an hour, or even longer.

3. CONDUCT ENOUGH INTERVIEWS TO GET AN ACCURATE SENSE OF YOUR POTENTIAL MARKET.

There is no universal magic number when it comes to customer interviews, because every product is different. Your focus should be on collecting insight from a wide range of perspectives in order to develop a comprehensive idea of your product's potential. For some, this may take a dozen interviews. For others, it could take 50.

With an idea that is further along, there is generally more at stake. Expect to need a higher volume of interviews when seeking to understand the minimum product required to solve customer problems.

4. WHEN POSSIBLE, SPEAK TO PROSPECTIVE CUSTOMERS FACE-TO-FACE.

There's no better way to conduct customer interviews than in person. Face-to-face communication allows you to read body language and facial expressions. If you visit a prospect at work, you'll see their environment. Something as simple as the stacks of paper on their desk might lead you to ask questions about things you never would have considered mentioning over the phone.

If in-person interviews are out of the question, resort to your next best options: video chat or phone call. Avoid email interviews and impersonal surveys when possible. Communicating asynchronously causes unnecessary delay and limits those impromptu follow-up questions that you didn't think about until initial answers were provided.

5. DO THE RESEARCH AHEAD OF TIME TO ENSURE YOU'RE INTERVIEWING THE RIGHT PERSON.

It's important to understand who exactly you're talking to, and whether or not they hold a seat at the decision-making table. Are you talking to someone who helps manage the budget or an end user? How do these different personas view your product differently?

It's essential that you speak to a wide variety of people holding different roles and view them all as "customers." If you're only talking to the end-users of the product but not the person who's writing the check for it, you may be in for a surprise down the road.

6. LET THE CUSTOMER DO THE TALKING.

As the interviewer, you should do less than 50% of the talking. Reserve the majority of your speaking for asking questions. Remember, you're not interviewing this person to sell your product. You simply want to learn from them.

As we'll explain further later on, one helpful technique is simply asking "Why?". This is a great way to get to the true underlying problem that your product needs to solve. Most of your questions should be open-ended to encourage your customer to speak more and explain their thinking.

7. DON'T PRESENT YOUR PRODUCT OR SOLUTION TOO EARLY ON IN THE VALIDATION PROCESS.

In the beginning, you're not validating a product. You're validating a problem. Before you thoroughly understand the problem you're solving, you should be talking very little about your potential product.

After you understand the problem, however, a high-level presentation explaining the value propositions of the product and a few of its key features is often enough to convey the big picture.

8. USE THE BUDDY SYSTEM FOR INTERVIEWS AND DOCUMENT YOUR FINDINGS.

Documenting your interviews is important. By your tenth interview, they will start to blend together and you'll have trouble remembering important details.

Tag-teaming your interviews allows one person to take notes, while the other can focus solely on asking the right questions. Plus, two minds are better than one! Everyone interprets things differently, so try experimenting with pairings from different teams and backgrounds.
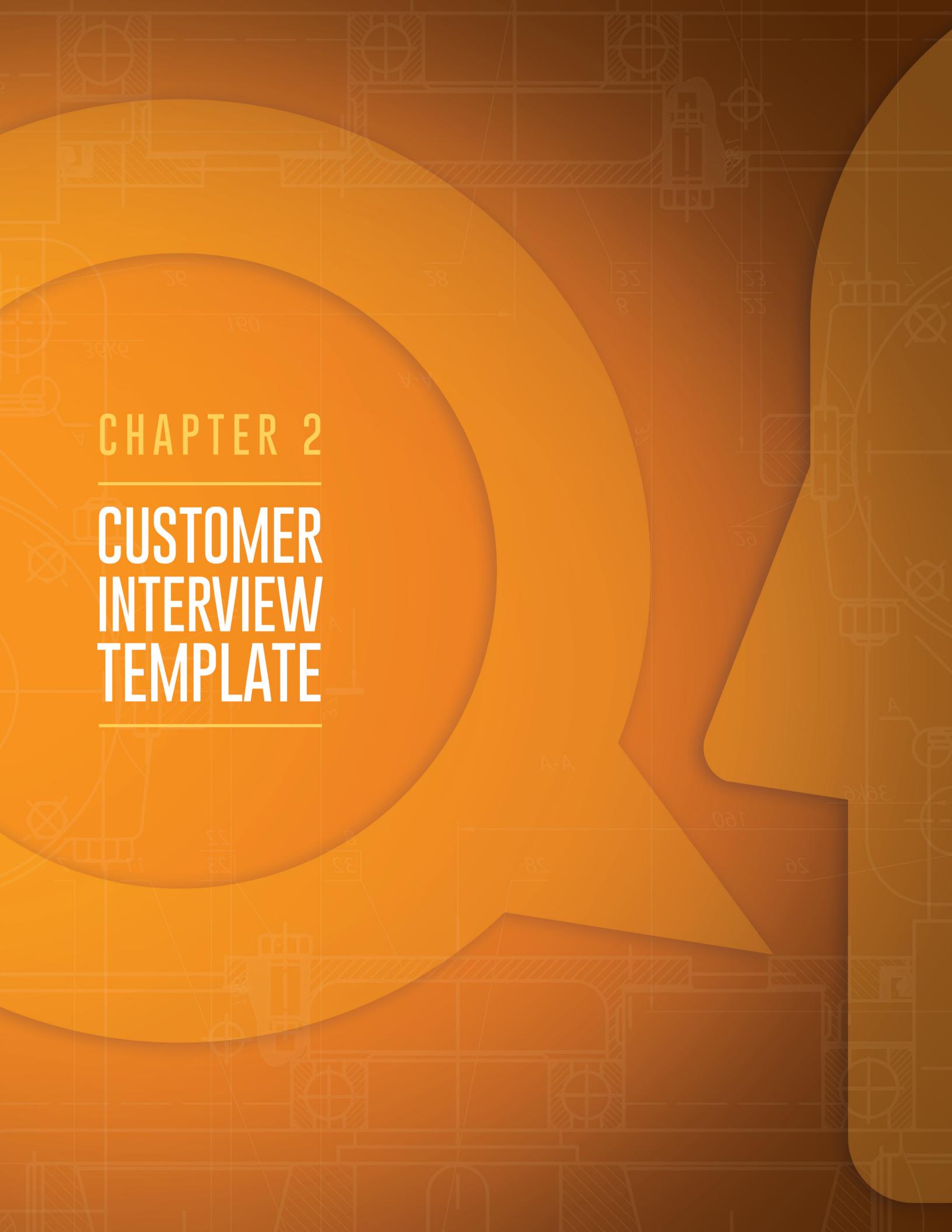
9. ASK QUESTIONS THAT FOCUS ON PROBLEM-SOLUTION RELATIONSHIPS.

In the next section, we'll cover 12 example questions to ask in your customer interviews. Open-ended questions are key to any successful interview, as they swing the door wide open for insightful customer feedback.

Open-ended questions also give prospective customers opportunities to describe friction points in their daily work, identify opportunities for improvements, and ideally, validate your own hypotheses about the problems your product might solve.

BONUS TIP: QUOTE OF THE DAY

At the end of each interview, review your notes for one stand-out quote that summarizes the chat. Document this quote! With each new interview, you'll get another "Quote of the Day." Over time, these quotes will highlight themes and any glaring problems (or upsides) regarding your product or idea.

CUSTOMER INTERVIEW TEMPLATE

2 CUSTOMER INTERVIEW TEMPLATE

Speaking of best practices, did we mention organization? If you're like many product managers, the insight in the previous section is only as helpful as the framework that can be used to record it all.

Below is a simple customer interview template to help you plan, conduct, and document your interviews. The template covers some key areas for a successful customer interview. The first two sections, "Logistics" and "Background Information" call for some data points which can and should be recorded before the interview. For example, what product or idea is the interview for? When is the interview? Who is the prospect?

The majority of your interview notes will go in the third section, "Key Discoveries." Some prefer to record their notes directly into a template like this, but don't let yourself be restricted. Sometimes the best approach is to record notes and fill in the template after the fact. As long as you're recording insight in some sort of orderly fashion by which you can identify patterns and trends, you'll be well on your way to conducting successful customer interviews that serve to improve your product.

Note that this template is designed for the product discovery phase of product development. We know that your idea may be further along in the lifecycle, or that you may want to tweak this template to better fit your own process. If that sounds like you, here's a link to the template as a Google Doc. Feel free to make a copy and edit as needed!

ProductPlan

LOGISTICS

PROJECT / PRODUCT / IDEA:	
INTERVIEW DATE:	
OUR TEAM PARTICIPANTS:	
AUDIO RECORDING LINK:	
PURPOSE/INTENT (WHAT ARE WE TRYING TO VALIDATE?)	

BACKGROUND INFORMATION

CUSTOMER / PROSPECT NAME	
POSITION / ROLE	
COMPANY AND WEBSITE	
CLASSIFICATION / DEMOGRAPHICS	
CURRENT SOLUTION(S)	
CONTACT INFO	

KEY DISCOVERIES

PROBABILITY OF BUYING / USING (E.G. WILL NOT BUY, MAYBE WILL BUY, HIGHLY LIKELY TO BUY)	
KEY PROBLEM STATEMENTS WE HEARD	
KEY VALUES PROVIDED BY OUR SOLUTION (IF ANY)	
OBJECTIONS TO USING OR BUYING OUR SOLUTION	
CHANGES TO OUR MVP? (E.G. FEATURES TO ADD OR DELETE)	
OTHER SUGGESTED FEATURES	
OTHER INTERESTING THINGS WE LEARNED	
COMPELLING QUOTE THAT SUMMARIZED THE CALL	

11 GREAT CUSTOMER INTERVIEW QUESTIONS

3 11 GREAT CUSTOMER INTERVIEW QUESTIONS

CUSTOMER INTERVIEW QUESTIONS CHEAT SHEET

With some best practices and a foolproof template in your toolbox, it's time to hit the ground running and schedule up some interviews. This is it! What could go wrong?

We know, it's not so simple. Below are some tactical questions we recommend asking. These questions are designed to extract the most useful information from your customer or prospect. Note that they put Best Practice #9 to action - they're all open-ended!

1. "WHY?"

This is by far the most versatile question to include in your arsenal. Product managers should think like investigators. They should ask "why" to figure out the real reason for an answer. Why did a customer disagree with your pricing model? Why did they really want a particular feature?

2. "HOW DO YOU DO THAT TODAY?"

Asking this question works well if a customer asks for specific features or capabilities. Or if they are using competitive products. How exactly are they currently dealing with the problem your product is meant to solve? From here, you can evaluate the discrepancy between currently available solutions and your own.

3. "HOW DO YOU KNOW YOU'VE HAD A SUCCESSFUL (DAY, MONTH, YEAR)?"

This is a great question for understanding motivation. It's also one of the best customer interview questions to ask the decision-maker who would ultimately be purchasing your product. Success metrics can either be quantitative or qualitative. What's important is that you understand whether or not your product will help improve this metric in some way. If it does, this becomes a valuable nugget to include later in your marketing messages and value propositions.

4. "HOW DO YOU FEEL ABOUT…YOUR CURRENT SOLUTION? …A FEATURE? …THE PRICE?"

Try to be empathetic when asking questions and try to get inside the head of the customer. Asking how they feel about their current solution, your solution, the price, etc. is a great way to reveal some insights. Of course this is not a question that you ask right off the bat. Save this one for after you've established some rapport.

5. "WHAT'S THE MOST FRUSTRATING THING ABOUT…THE CURRENT SOLUTION …A FEATURE …YOUR DAY?"

Trying to understand what is most frustrating to customers will often elicit some great responses. You can also ask this about other products if you're considering displacing a competitive product or feature. Answers to this question may help you hone in on potential differentiating features.

6. "WHAT DO YOU WISH YOU COULD DO WITH (A PRODUCT, A TASK, A FEATURE) THAT YOU CAN'T DO TODAY?"

This is a fairly standard product management question. You want to try to understand how things might be different with a particular product or job function. Get more insight into the value of the customer's requested capability by following up with "why?" Why do they want that function?

7. "HOW WOULD YOUR (DAY, JOB, TASK) BE DIFFERENT IF YOU HAD THIS?"

This question is a good one for understanding before and after scenarios. You want to understand how your customer's life will be different if they adopt a particular feature or product. Are they going to save time? Are they going to make money? Are they going to be happier? This also serves as a great way to check-in and make sure the prospect's expectations are set appropriately.

8. "IF YOU SOLVE THAT PROBLEM, HOW MUCH MONEY WILL YOU SAVE OR MAKE?"

Of course, this question doesn't always have to focus on money; it could be "time saved" or "hassle avoided." If you are introducing a new product or feature, you want to understand how it's going to make money, save time, or relieve pain. With this insight, you'll better understand your product's perceived value, which will eventually inform your pricing strategy.

9. "CAN YOU GIVE ME AN EXAMPLE?"
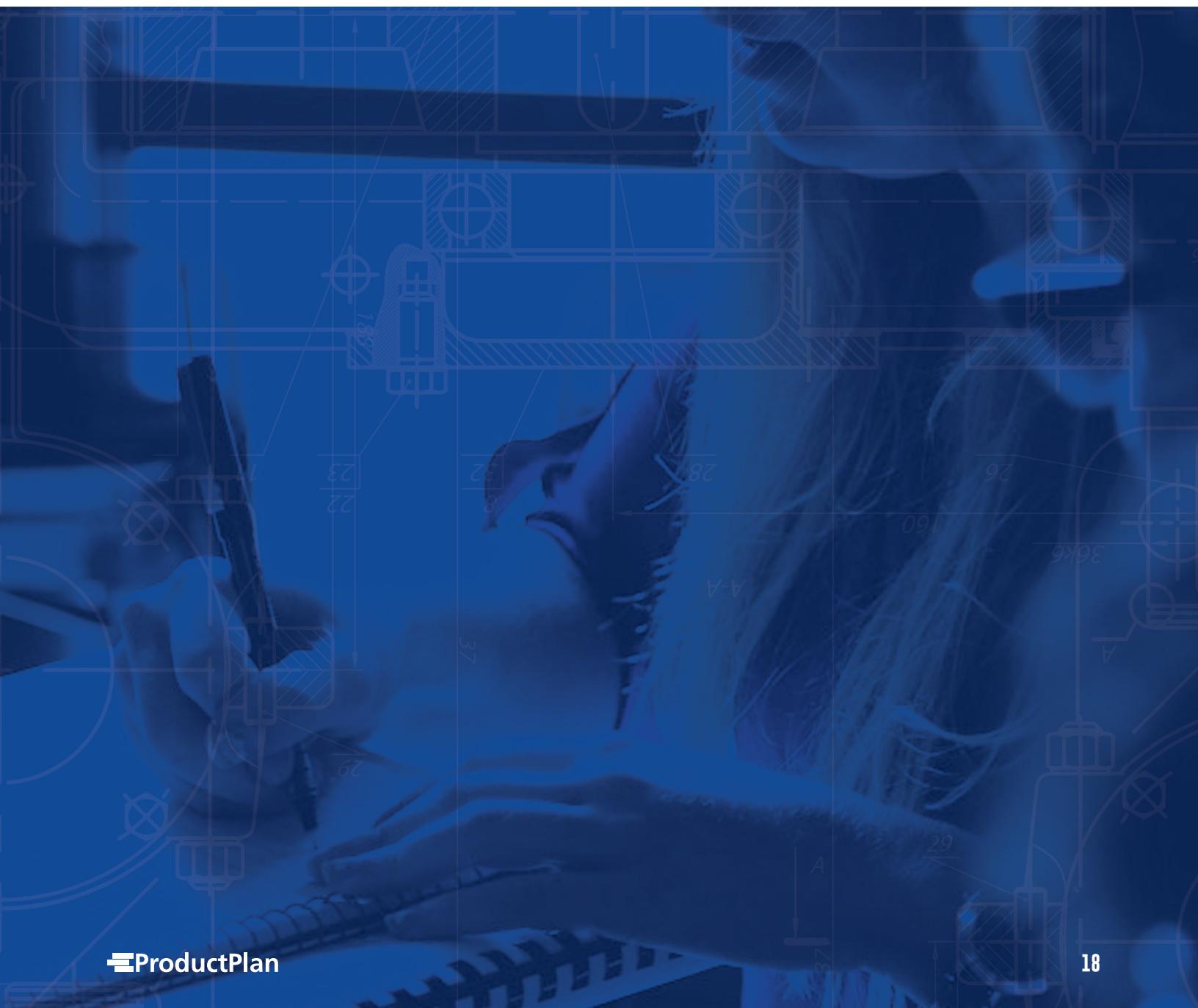
If a customer asks you for a specific feature or capability, asking for an example is a good way to shed light on what they really want.

10. "IF THIS WERE AVAILABLE TODAY WOULD YOU BUY/USE IT?"

This question is great for new product development. Of course, as with most product management, there is never a black and white answer. Rather, answers from customers are often nuanced and biased. But this question is still a good one to ask. If you are proposing a new product or new premium feature, ask whether they would buy it near the end of the conversation. Then sit back, let there be some uncomfortable silence, and wait for an answer.

11. "WHERE DOES SOLVING THIS PROBLEM FALL ON YOUR PRIORITY LIST?"

When you are proposing a new product or feature, customers are often excited about it. You're giving them the vision, and people tend to get on board and want to support you. This question helps you understand their likelihood of actually taking action based on that excitement. If solving the particular problem is priority number 4 or 5, you're probably okay. If it's further down on the list (or not on the list at all), you might have some challenges ahead of you.

CONCLUSION

4 CONCLUSION

We realize that learning how to conduct effective customer interviews is just the beginning in your quest to build better features and products. The next step is to learn how to act on the feedback you acquire through conversations with customers.

To conclude, we'll leave you with some final thoughts to help you translate findings from customer interviews into strategically-informed action items. As you begin to analyze your first batch of customer feedback, here are a few common tips to keep you focused:

DON'T LISTEN TO THE LOUDEST VOICE
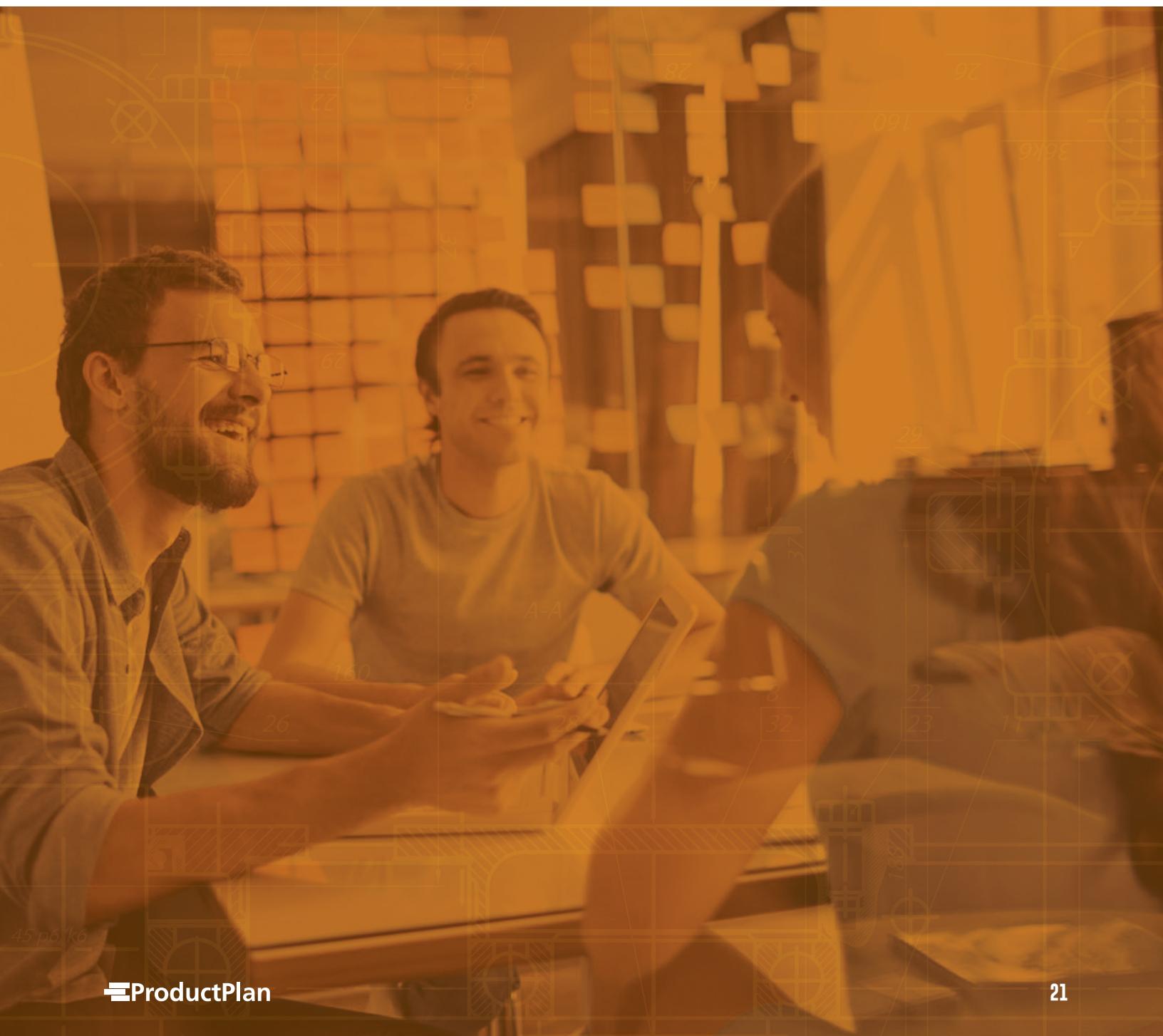
It can be tempting to listen to the "loudest voice," but it's not always the best idea, especially early on in your product's development. Remember that you want to look for themes and trends in your feedback, and a single customer making the same request repeatedly (and loudly) does not provide sufficient evidence of a trend among your greater userbase.

DON'T TAKE THINGS AT FACE VALUE
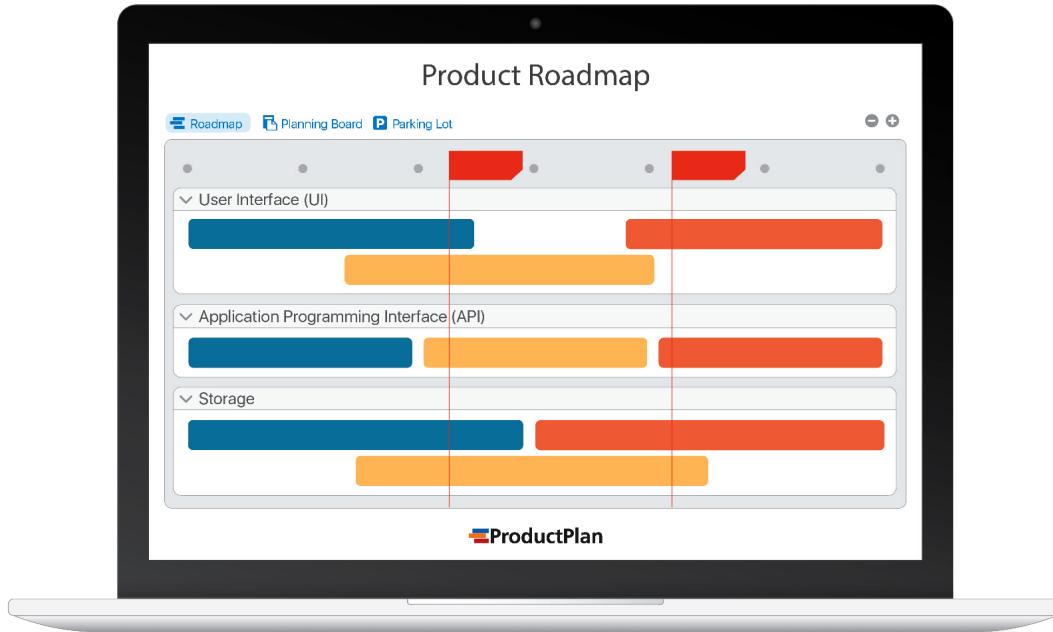
If you want to extrapolate useful insight from customer feedback, you need to dig to the core of every request. When your customer asks for a certain feature, what is it that they actually want? What is the greater problem they are trying to solve? What the customer asks for is not always the best solution, but it is always a great hint at their biggest problems.

DON'T FORGET TO PLAN FOR THE FUTURE

Customer interviews are never complete, and they'll remain important for the entire lifespan of your product. If you play your cards right, your product and your customer base won't stay small forever. You may reach a point where you feel that you have too much feedback to manage. To avoid this, you must create a sustainable, documented process for collecting and managing feedback from the beginning. You'll thank yourself down the line.

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ProductPlan is the easiest way to plan, visualize, and communicate your product strategy. We believe roadmaps are essential to create organizational alignment and ship successful products. Our intuitive features for building, managing, and sharing roadmaps help teams across the globe convey the big picture in one place.