

Customer Interviews Guide

Purpose

Run unbiased, repeatable conversations that uncover *real, quantified* pains, current workarounds, constraints, and buying triggers—so you can make a **Go / Pivot / Kill** call grounded in evidence.

When to use

- After drafting a clear **problem hypothesis** and selecting a specific **ICP wedge**.
 - Before solution demos or pricing conversations.
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Interview goals (keep these front-of-mind)

1. Validate **pain existence, frequency, and severity**.
 2. Map **current workflow & workarounds** (time/cost/risk).
 3. Surface **constraints** (IT, legal, procurement) and **buying path**.
 4. Capture **willingness to change** and early **pilot signals**.
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Structure (30–45 minutes)

- **00:00–02:00 | Setup**
Thank them, share purpose, request permission to take notes/record.
- **02:00–15:00 | Recent story (“last time”)**
Walk through the most recent occurrence of the problem end-to-end.
- **15:00–28:00 | Workflow & workaround deep-dive**
Steps, artifacts/screens, time spent, handoffs, failure points, costs/risks.
- **28:00–35:00 | Impact & priorities**
Quantify time/money, downstream effects, “why now.”
- **35:00–40:00 | Constraints & buying path**
Budgets, decision-makers, IT/security, procurement steps.

- **40:00–45:00 | Close**

Summarize what you heard, ask for referrals, and (optionally) test pilot interest.

Essential questions (ask verbatim, then probe)

1. **“What’s the biggest challenge you face with *[problem area]*?”**
 - *Probe*: “When did this last happen? What was going on right before it?”
 - *Pin to context*: “Where were you in your workflow when it hit?”
 2. **“How are you currently solving this?”**
 - *Probe*: “Show me the spreadsheet/email/tool you used.”
 - *Quant*: “Roughly how long does that take each time? How often?”
 3. **“What would an ideal solution look like?”**
 - *Probe for outcomes, not features*: “What changes first? What *wouldn’t* you want to change?”
 - *Guardrail*: “If nothing else changed, which 1–2 outcomes would matter most?”
 4. **“How much time or money does this problem cost you?”**
 - *Quant*: “In the last month/quarter, about how many hours or dollars?”
 - *Ripple effects*: “What got delayed? Who else was pulled in? Any compliance or customer impact?”
 5. **“What tools have you tried before?”**
 - *Probe*: “What worked, what broke, why did you stop? Price? Fit? IT constraints?”
 - *Satisfaction*: “On a 1–5 scale, how satisfied are you with your current workaround?”
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Probing follow-ups (to make answers concrete)

- “Walk me step-by-step through what you did *right after* you noticed the issue.”
- “What did you try *first*? And then?”
- “How do you know it’s ‘good enough’ today?”
- “If you had a magic wand, what would change *tomorrow*?”

- “What would prevent you from trying something new?”
 - “Whose budget would a fix come from? Who signs off?”
 - “If I called you in 90 days, what measurable change would make this a ‘no-brainer’?”
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Quantifying impact (simple, consistent measures)

Capture **per incident** and **per month/quarter**:

- **Time:** hours spent by role × frequency
- **Cash:** direct spend on tools/contractors
- **Risk:** missed revenue, SLA penalties, compliance exposure
- **Stress:** note emotion words (frustrated, anxious, scrambling) alongside quotes

Tip: Ask for artifacts (reports, screenshots, email threads). They anchor numbers to reality.

Constraints & buying path (don’t skip)

- **IT/Security:** data residency, SSO, integrations, vendor lists
- **Legal/Compliance:** data types, retention, audit requirements
- **Procurement:** steps, thresholds, timing, stakeholders
- **Budget:** line item owner, cycle, approval limits

Questions

- “What integrations would be non-negotiable?”
 - “What would security want to review?”
 - “What’s the typical purchasing path for tools like this here?”
 - “Who would be skeptical, and why?”
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Signals of real pain (evidence you can trust)

- **Recency:** “last week/yesterday” vs. “sometimes.”
- **Specifics:** concrete times, names, files vs. vague opinions.
- **Workarounds:** effortful, multi-tool processes they *hate* but still do.
- **Consequences:** measurable cost/risk and executive attention.

- Pull: they ask **you** for next steps or volunteer pilot constraints.
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Bias guardrails (Do / Don't)

Do

- Ask about **past behavior** (not hypothetical futures).
- Repeat back what you heard; confirm or correct.
- Sit in silence; let them fill it.
- Tag exact quotes and emotions.

Don't

- Pitch early or show mockups unless asked at the end.
 - Ask leading questions ("Would you pay \$X?").
 - Overweight one big logo; sample across your ICP.
 - Confuse **frequency** with **severity**—measure both.
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Recruiting & screener (who you should talk to)

Where: warm intros, practitioner communities/Slack, industry forums, panels.

Screen for: role, hands-on involvement, frequency of the problem, tools in use.

Screener sample (3–5 items)

- Role + tenure
 - "In the past 30 days, how often did *[problem]* occur?" (Daily / Weekly / Monthly / Rare)
 - "Which tools do you use when this happens?" (select all)
 - "Are you involved in selecting or approving tools for this workflow?" (Yes/No)
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Decision gate (post-interview batch)

Advance if your segment shows most of the following:

- **Consistency** across 15–20 interviews (themes repeat).
- $\geq 60\text{--}70\%$ experience it **weekly+**; **importance** $\geq 4/5$; **satisfaction** $\leq 2/5$.
- **3–5** express **pilot interest** (time or money).

- Clear **buying path** and identified **budget owner**.

Otherwise **pivot** your hypothesis or **kill** and move to a higher-signal segment.

Scripts (ready to use)

Opener (no-pitch)

“Thanks for taking the time. I’m researching how *[role]* handles *[workflow/problem area]*. I’m not here to sell anything—just to learn how it works in real life. Is it okay if I take notes?”

“Last time” prompt

“Can you walk me through the *last time* this happened—step by step—from when you first noticed it to when you wrapped up?”

Quant prompt

“About how long did that take? How many people were involved? If you had to put a number on it, what would you estimate the cost or impact was?”

Close + pilot test (optional)

“Based on what you shared, we’re exploring ways to reduce *[specific pain/outcome]*. If we set up a small, low-risk pilot focused only on that outcome, would you be open to trying it? What would you need to see for it to be a no-brainer?”

Common pitfalls

- Talking to non-buyers or infrequent sufferers → **tighten your screener**.
- Accepting opinions without artifacts → **ask to see the files/screens**.
- Asking feature wish-lists → **stick to outcomes and constraints**.
- Recording everything but deciding nothing → **score and gate** immediately.