Team Management

Customer Interview Guide

**Defining Our Key Customers & Processes**

**Team: Date:**

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| --- | --- | --- |
| **List the most important products or services that result from the work of our team.** | **In order of importance list the most important internal customers who receive our work.** | **In order of importance list the most important external customers who receive our work.** |
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**Customer Feedback**

Team: Customers:

Complete one form below for each customer

|  |  |  |  |
| --- | --- | --- | --- |
| **Product or Service provided to this customer** | **Current Feedback: Type, frequency, specific, timely?** | **Desired Feedback: Type, frequency, specificity, timely?** | **Actions we will take to solicit this feedback?** |
|  |  |  |  |

**Customer Feedback**

Team: Customer:

Complete one form below for each customer

|  |  |  |  |
| --- | --- | --- | --- |
| **Product or Service provided to this customer** | **Current Feedback: Type, frequency, specific, timely?** | **Desired Feedback: Type, frequency, specificity, timely?** | **Actions we will take to solicit this feedback?** |
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**Customer Feedback**

Team: Customer:

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| --- | --- | --- | --- |
| **Product or Service provided to this customer** | **Current Feedback: Type, frequency, specific, timely?** | **Desired Feedback: Type, frequency, specificity, timely?** | **Actions we will take to solicit this feedback?** |
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**Customer Interview Guide and Interview Results**

Opening Statement: Why are we conducting interview and what do we hope to achieve?

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| **Category of Questions[[1]](#footnote-1)** | **Questions To Be Asked** |
| 1. | Opening Question:  Follow-up Question: |
| 2. | Opening Question:  Follow-up Question: |
| 3. | Opening Question:  Follow-Up Question: |
| 4. | Opening Question:  Follow-Up Question: |

**Interview Notes and Meaning**

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| Team: Customer Being Interviewed: Date: |
| Interviewees: |

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| --- | --- | --- |
| Category: | Question:  Follow-Up: | Answer:  Meaning: What did we find most helpful about this answer? |

|  |  |  |
| --- | --- | --- |
| Category: | Question:  Follow-Up: | Answer:  Meaning: What did we find most helpful about this answer? |
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Analyzing the Results of Your Interviews:

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| Team: Customer Being Interviewed: Date: |
| Interviewees: |

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| What is the single most significant lesson we learned? |
| What is the most positive feedback we received? |
| What is the most negative feedback we received? |

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| --- | --- |
| List the concerns raised by your customers: | On a scale of 1 to 10, how great is this concern?  (10 = we absolutely cannot live with this!; 1 = a slight concern) |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |
| 5. |  |
| 6. |  |

1. Such as reliability, courtesy, timeliness, etc. [↑](#footnote-ref-1)