How to do Customer Interviews

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Pre-Interview

- Learn. The purpose of customer interviews should be to help you learn something new; not simply to find the answer you want confirmed. Remind yourself of this purpose throughout the interview process.
- Create a list of questions you would like to learn about from potential customers. Narrow the the types of questions that you include, to the scope of your interview (e.g., problem interview, solution interview).
- For each question, think about whether asking the question directly to customers is the best indicator of their attitudes and behaviors, or if there are other indicators you should use (e.g., invite customers to show you the home screen of their mobile device, as a behavioral measure of apps the customer often uses). Triangulate indicators to provide a holistic understanding to your questions.
- Write down your best guesses of how you hypothesize the majority of your customers will respond to your questions. This is a tempting step to avoid, but don't do it. Otherwise after the interview, hindsight bias can lead you to believe many of your findings were obvious. This step also helps you question your assumptions about why the questions are important and relevant to include.
- Write down what you plan to do if you learn that your hypothesis is supported or unsupported. This is the most tempting step to avoid, but don't do it! You will be tempted because it can be difficult to decide how you will use the data. However, it's important because it will help you prioritize questions that lead to actionable results versus questions that are just interesting to learn about. This step helps prevent analysis paralysis after you complete your interviews, and will help you focus on the most important topics, and metrics that matter.
- Organize your questions into a logical sequence, or by type of content.[1] Consider an hour-glass format: begin with broad general questions; progress into specific and personal questions, then funnel out to broad questions at the end.[2]
- Don't be overly concerned about constructing the perfect interview guide masterpiece. Most important is that you move forward with planning and preparation in a timely manner and not get hung up on any one step. You will have the chance to initially pilot, and then iterate on your interview guide as you progress through your interviews.
- Keep in mind the role of qualitative interviews in the research process is to search for and discover new ideas, and develop and refine hypotheses. Future quantitative studies will be required to test whether the patterns observed in qualitative small

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[1] Bartholomew, K., Henderson, A. J. Z., & Marcia, J. E. (2000).
[2] Cannell & Kahn (1968). Interviewing.

samples occur among the overall population of people who are similar to the customers you interview.
- Open-ended questions (e.g., who, what, where, when, why, how) are best suited for qualitative interviews.

Interview

- Learn. Remember throughout the interview to focus on actively listening to your customers, not thinking of what you want to tell them. Your customer should be speaking at least 80% or more of the time.
- Relax and have fun! It's important to be conversational and put the customer at ease with your tone and body language. Use small talk to create a friendly tone and to help the customer relax.
- Start the interview by welcoming the customer and introducing yourself and any team members
- Explain that it's most important that they be honest and candid. Ask them to be as skeptical and candid as they would be in real life, if they were sitting down with their best friends and answering your questions. Describe that it's important for you to understand what their real opinions and preferences are so that you do not waste time building a product they would not use. Distance yourself from the topic, so the customers do not feel expected to perform certain responses that are not their true responses.
- Introduce the general format of your interview and how long you expect each section of the interview to take. If you notice that customers continually drift into tangents during your interviews, it can be useful to introduce structure, with an agenda describing the amount of time you would like them to devote to each topic area.
- Begin asking your interview questions. Remember to be conversational -- follow up on their responses to your questions, ask for examples or invite them to share more about something they said.

Post-Interview

- Ask for something to measure engagement and interest (e.g., money, referrals, friend's emails, personal information)
- Briefly rate the customer across your primary metrics

Example of a Customer Interview Outline

Goals

We want to discover ...
1. If this is the right early adopter customer segment (product-market fit)
2. Most frustrating problems with ...
3. How badly they want these problems solved
4. How they solve the problems today (existing alternatives)
5. Willingness to invest in our solution
6. What changes would they make to our existing value prop for MVP

Metrics
1. Team assessment of likelihood of being early adopter segment
2. Self-described intensity of problems in relation to other problems they want solved
3. Team assessment of engagement with problems and solution
4. Agreement to be beta customers
5. Referrals

Hypotheses
1. Early adopters will be …

Problems

We hypothesize that … potential customers will have the following problems:
● Problem A
● Problem B
● Problem C
● Problem D
● Problem E
● Problem F

Method

Round 1: We will target ... who have gone viral on Youtube, and use Android smartphones for a significant portion of their video workflow. Interviews will be blind and mask our company affiliation. We will conduct live interviews over Google Hangout. We will compensate participants with ... (since they are ... taking time from their work schedule for our interview, to reduce likelihood of skipping interview or arriving late, and reflecting the value of the team's time if they skip the interview).

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<u>Interview Guide</u>

WELCOME - set the stage (1 min)
Hi - thanks for joining us... confirm okay with recording ... scope of interview ... request candid feedback ...

COLLECT DEMOGRAPHICS (2 min) - test customer segment
Confirm relevant background info from screener

SET PROBLEM CONTEXT (10 min)
- In what app do you edit your videos?
- What do you like about your video apps?
- How often do you use your favorite video apps?
- Do you have any frustrations or challenges with your video apps?
- What would you like improved about the video apps?
- Think of some other problems you have with video ... in relation to those problems, how would you rank this problem relative to those problems?
- How did you first hear about it?
- What were you trying to get done (or make)?
- Why did you sign up?

PROBLEM DISCOVERY (4 min)
- What is your biggest frustration for capturing and editing video on your Android smartphone? Does anything about the process bother you or drive you crazy? *[Ask open-end before ranking below; Probe/prompt to understand -- ask why, how, what, where]*

PROBLEM RANKING ACTIVITY (8 mins) - test problem statements
We'll next show you a range of potential statements that may or may not be problems for someone like you. We'd like to learn whether these are problems for you, how you would describe these in your own words, and what would be your top three problems.

[Direct customers to …]
- Problem A
- Problem B
- Problem C
- Problem D
- Problem E
- Problem F

[Probe/prompt to understand -- ask why, how, what, where]

WRAPPING UP - the ask (2 mins)
- Could we sign you up for a beta?

- Can we get a name/email of a friend we can talk to next?

* Interview ends *

DOCUMENT/SCORE INTERVIEW (5 mins)
- ***Customer match*** (10 points = has behaviors or characteristics of an early adopter; 5 points = has relevant behaviors or characteristics, but will take longer to convince to adopt; 0 points = not interested, poor match)
- ***Successfully rank problems presented*** (10 points = strong interest in problems, irrespective of ranking; 5 points = couldn't decide which problems were painful, but still really interested in problems; 0 points = no interest in problems)
- ***Actively frustrated with relevant problems*** (10 points = problems are regular disruptions for the interviewee; 5 points = problems are semi-disruptive, but not a real nuisance; 0 points = not currently frustrated/annoyed with any aspects of problems)
- ***Join Beta*** (10 points = accept invitation and really interested; 5 points = accept invitation with mediocre interest, probably willing to use if we specifically ask, but wouldn't on their own; 0 points = decline)
- ***Refer friends*** (10 points = share contact information during the interview; 5 points = say friend might be interested, but need to talk to friend first before sharing info; 0 = no referral)

Other Examples of Customer Interview Scripts

Example of problem interview script. Maurya, A. (2011, Aug.). The achilles heel of customer development. Blog post.
Example of problem interview script. StartitUp. (Accessed 2015, April). Task: Problem interview script. Blog post.
Example of solution interview script. StartitUp. (Accessed 2015, April). Task: Solution interview script. Blog post.

Tips (forthcoming)

Tips for writing good interview questions
Tips for reducing interviewer bias
Tips for reducing customer bias
Tips for reducing measurement bias
Tips for preparing screeners
Tips for finding customers to interview
Tips for deciding how many customers to interview
Tips for scheduling and handling logistics with customers
Tips for analyzing results and knowing how to use the data you collect
Tips for customer incentives
Ethical obligations

Video Resources

University of Derby. (2013, Sept.). What makes a good interview: Advanced qualitative techniques. 5 min video.

Blank, S. (2013, Feb). Conducting a customer interview. 1 min video.

Potential topics to include in customer interviews
Blank, S. (2015, Feb). Jobs to be done. *How to build a startup: Lean LaunchPad.* Online course. 2 min video.
Blank, S. (2015, Feb). Rank Jobs and Day in the Life. *How to build a startup: Lean LaunchPad.* Online course. 1 min video.
Blank, S. (2015, Feb). Customer gains. *How to build a startup: Lean LaunchPad.* Online course. 2 min video.
Blank, S. (2015, Feb). Customer pains. *How to build a startup: Lean LaunchPad.* Online course. 2 min video.
Blank, S. (2015, Feb). Customer archetypes. *How to build a startup: Lean LaunchPad.* Online course. 2 min video.
Blank, S. (2015, Feb). Customer in context. *How to build a startup: Lean LaunchPad.* Online course. 3 min video.

Examples of what to do versus *NOT* to do during interviews (general examples)
i-Tech. (2014, July). Demo qualitative interview: With mistakes. 6 min video.

i-Tech. (2014, July). Demo qualitative interview: How it should be done. 14 min video.

References and additional reading

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Lange, M. (2012). *Comparative-historical methods.* Thousand Oaks, CA: SAGE.

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Sreejesh, S., & Mohapatra, S., & (2013). *Mixed method research design : An application in consumer-brand relationships (CBR)*. New York: Springer.

Tracy, S. J. (2012). *Qualitative research methods : Collecting evidence, crafting analysis, communicating impact*. Oxford, UK: Wiley-Blackwell.

Yusuf, F., Martins, J. M., & Swanson, D. A. (2013). *Methods of demographic analysis*. New York: Springer.