

Better understand your customers with the

Customer Interview Guidebook

With Jeannie Walters, CCXP &



Why Conduct Customer Interviews?



Customer Interviews Work in Concert With Customer Surveys

Customer surveys can be helpful in better understanding the true customer experience, but tend to be impersonal and can be difficult to pull deep insights from.

Customer Interviews support surveys by providing what surveys can't: An actual two-way conversation with customers to truly understand their motivations, frustrations, and victories.

Customer Interviews Support Your Journey Mapping Investment.

Increasingly, **organizations are investing great amounts of time and money into customer journey mapping (CJM)**. And they should – CJM is a powerful tool in understanding and improving the customer journey.

But in my years of [consulting, coaching, training and workshopping](#) with organizations around the globe, I've found that **oftentimes leaders are so excited to begin the mapping process that they miss out on foundational steps** that are key to the success of their Journey Mapping initiatives.

Customer interviews are one of those key foundational steps.

Let's look at some other **Common Questions:**

? **Who should be interviewed, & how?**

? **Who should conduct customer interviews?**

? **What questions should be asked?**

? **How many interviews should be conducted?**



Who Should Be Interviewed, & How?

Seek a Broad Range of Experiences. Interview Where Interviewees Will Be Most Comfortable.

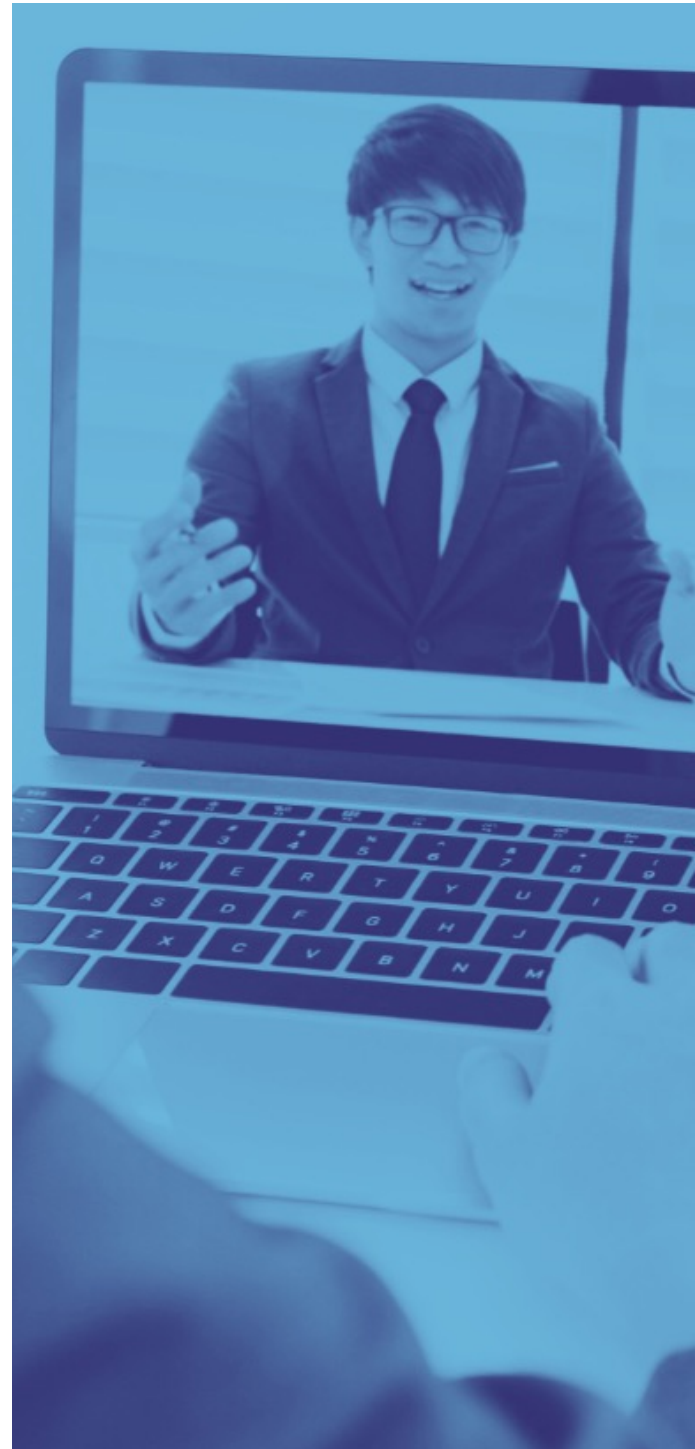
We recommend a video chat as our preferred option, because **being able to see someone's facial expressions and body language can be key to connecting to their emotions.**

With that said, when we conduct customer interviews for clients, we always give interviewees the option for a standard phone call.

Set interviewees up for success by making sure they're comfortable.

When it comes to *who* to interview, we recommend a broad range of experiences and contact types.

We'll look at some of these options later in the guidebook.



Who Should Conduct Customer Interviews?

Look for an Impartial Interviewer

Oftentimes, the best choice to conduct customer interviews is a third party outside of your organization. **Using a third party interviewer:**

- × Can make interviewees more comfortable being 100% honest
- × Can help avoid bias both in how questions are presented and how answers are interpreted
- × Can identify themes and trends to present interview insights in a more organized way

If you do conduct the interviews directly, I encourage you to find an interviewer that:

- ✈ The customer hasn't interacted with before.
- ✈ Isn't directly involved with the products, services, or touchpoints being discussed in the interview
- ✈ Can bring an objective perspective to the interview, welcoming criticism as much as praise.

The interviewer needs to be patient, encouraging and open to wherever the conversation goes!



What Questions Should Be Asked?

Combine a Consistent Set of Foundational Questions with Contextual Custom Questions.

To spot trends and assure consistency, it helps to have a handful of foundational questions that are asked in every interview. These are usually broad enough to apply across all or most of the types of interviews you'll conduct.

But if you *only* ask foundational questions that are broad enough to apply to everyone, you'll miss out on insightful answers that may be specific to one individual or group's experience.

That's why we recommend combining foundational questions with contextual questions as you go.

We'll review some ideas for both foundational and contextual questions later in the guidebook.



How Many Interviews Should Be Conducted?

Keep the Number of Interviews Small and Manageable.

It's easy to want to interview *everybody*.

While a greater sample size may usually mean better data, customer interviews should be focused less on the *quantity* of responses and more on the *quality* of them.

When it comes to collecting as much data as possible, customer surveys are your best friend. They offer an efficient, if impersonal, way to collect information on customer sentiment.

Customer interviews are special because they offer something no survey can: an opportunity to have a deep, meaningful conversation with a customer.

But those answers lose their meaning if the sheer volume of them requires that they be summarized as data points.

We recommend around 8 to 10 interviews at a time, after which those answers can be reflected upon, shared, and may inform any following rounds of interviews you plan to do.

Next up: Let's review Experience Investigators' recommended
Customer Interview Process 🙌

Our Recommended Customer Interview Process

Ready to plan and conduct your own customer interviews?
Follow these steps:

- 1 Decide what your goals are**
- 2 Decide who you're interviewing**
- 3 Decide what questions to ask**
- 4 Create an easy way for customers to sign up and provide initial information**
- 5 Record initial information ahead of time**
- 6 Conduct the interview**
- 7 Make a note to follow-up**

Our Recommended Customer Interview Process

1 Decide What Your Goals Are

To get the most out of our interview questions, we must know what we're trying to achieve by asking them.

Ask some of these questions to help determine your goals:

➤ **Do we want to focus on a particular part of the customer journey?**

This could include relate to particular touchpoints that you know can be tricky for customers – for example, handing off a new customer from a Salesperson to an Account Manager.

➤ **How do we want and expect the outcomes of these interviews to affect our larger leadership and organizational goals?**

Customer Experience doesn't exist in a bubble. Any investment should be tied back to what it means for your organization as a whole.

➤ **What capacity do we have to act?**

For example, do you know that your Digital Team is swamped? Is your marketing leadership especially bought-in to making improvements? Plan accordingly.

➤ **Have we communicated these goals to anyone in the org who needs to know about them?**

Who will be affected by the goals you have in place? Have expectations been clearly set, and is everyone on the same page?

Our Recommended Customer Interview Process

2 Decide Who You're Interviewing

We also must know *who* we're interviewing, and why.

Earlier we recommended interviewing a broad range of customers. **Consider these customer types:**

- New customers
- Long-term Customers
- Customers who experienced an issue that has since been resolved
- Customers experiencing an issue now or who had one that wasn't resolved
- Prospects that were close to sale but didn't close
- Customers who worked with multiple departments or account managers
- Current prospects

In the first part of this process, you determined what your goals would be for these interviews.

Now, use that information to guide *who* you should be reaching out to to interview.

Our Recommended Customer Interview Process

3 Decide What Questions to Ask

Earlier, we shared that questions should be a mix of **foundational** questions that likely apply to anyone you're interviewing and **contextual** questions that dig deeper into a particular type of customer's experience.

Consider these foundational questions:

- ✈ What did you like about (defined experience)?
- ✈ What would you recommend to (brand) to improve the customer experience?
- ✈ What disappointed you?
- ✈ Did you shop (or leave for) a competitor? If so, can you share what you liked better or worse about that experience?

Two more questions I love to ask at the end of each interview:

- ✈ If you had a magic wand, what would you change about the experience?
- ✈ Is there anything I didn't ask about that you want to discuss?

While you can prepare some **contextual** questions before your interviews, these are often best delivered by simply **listening** to interviewee answers and then **asking probing questions** to dig deeper to get to the heart of their experience.

Our Recommended Customer Interview Process

4

Create an Easy Way for Customers to Sign Up and Provide Initial Information

Anyone who agrees to be interviewed is using some of their limited time and energy for the sake of your organization. That's a pretty amazing gift!

Of course, it's critical to recognize that gift by making the whole experience as easy and predictable for them as possible.

- ✈ Create a simple signup link using a scheduling tool like Calendly
- ✈ Use the signup form to collect information that will help provide context for the interview
- ✈ Assure your scheduling tool sends out a calendar invite and an interview reminder



Our Recommended Customer Interview Process

4

Create an Easy Way for Customers to Sign Up and Provide Initial Information

Here's a simple script you can send to those you're inviting to interview.

Adjust as you like, fill in the blanks, and you're ready to start inviting some interviewees!

Hi. I'm **[your name]** from **[interviewing org name]**, and we're looking for honest feedback from customers about their experience with **[journey, touchpoint, department, etc.]**.

I know you were a customer of ours from **[date range]** and we've brought in a third party expert to help us listen to our customers and turn their feedback into a better experience.

It is quick and easy! As a thank you for participating, we'd like to **[send you swag/offer you a gift card/invite you to a special event, etc.]**

Here's a link to schedule your time: **[link to scheduling tool]**

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5 Record Initial Information Ahead of Time

Save Your Interview Time for the Questions That Require Face-to-Face Interaction.

In step four, I suggested that you use the interview signup form to collect initial information that can help provide context.

Collecting that information ahead of time has another benefit: It gives you more time during the actual interview to talk about what really matters.

Answers you collect ahead of time may include:

- ✈ Name & contact info
- ✈ Their status (current customer, former customer, never been a customer, etc)
- ✈ How long they've been a customer (if applicable)
- ✈ Products/services they've used
- ✈ Any specific experiences, opinions, or moments in their journey they want to make sure get addressed during the interview

Our Recommended Customer Interview Process

6 Conduct the Interview

Keep Your Interview Format Consistent.

We recommend interviews last no longer than 30 minutes, following this format:

5 Minutes: Introduction & Overview

This is an opportunity for a quick introduction and explanation of what's to come. It's also a perfect time to reassure your interviewee what's said is never reported back with names, so they are more comfortable sharing honest feedback.

20 Minutes: Questions

Start with just a few *foundational* questions, then ask *contextual* follow-up questions to dig deeper into the heart of their experience.

5 Minutes: Closing and Thank You

Thank the customer for their time and communication with you. Let them know how you plan to follow up with them (if appropriate) and set any future expectations.

This last part may not take a full 5 minutes, but that's okay — everyone feels great when a meeting ends a little early, and your customers are no different!

Our Recommended Customer Interview Process

7 Make a Note to Follow-Up

Closing the Loop with Interviewees is a Key – But Often Overlooked – Last Step!

Your final interaction with the interviewee shouldn't be when you say goodbye at the end of your interview.

Have a plan in place to follow up with the interviewee, based on the expectations you've set during your correspondence with them.

This follow-up could include:

- Sending a handwritten note from a leader or employee at your company they'd recognize.
- When appropriate, send branded swag, or even a gift card or donation to a charity in their name to show your gratitude.
- And of course, if their feedback leads to change inside your organization, let them know the difference they helped to make!

Ready to Get Started with Customer Interviews?

If you're conducting customer interviews internally...

Gather a small team of cross-functional leaders and start with step 1: Deciding what your goals are.

- Will you be using customer interviews to help you build customer journey maps? For what parts of the customer journey?
- Will you be using interviews to build more accurate and complete customer personas?
- Or, will you be diving deeper into a specific identified customer challenge?

If you'd like a partner....

Experience Investigators can help. From small businesses to Fortune 500s, we've worked with countless organizations to fulfill our goal to Create Fewer Ruined Days for Customers.™



Ways we can help include:

- Conducting customer interviews
- Leading customer persona workshops
- Coaching & consulting around customer feedback
- And much, much more.

Learn more at ExperienceInvestigators.com

**Congratulations –
You're on your way to making a
big difference for your
organization and your customers.**

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