

HOW TO CONDUCT CUSTOMER INTERVIEWS

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Location, Location, Location

Record if you can, ask first!

Be **polite** – these people are doing you a favor

Cover all areas – marketing, sales, product, support, billing

Balance **Value** with **Volume** – be flexible

If legal, leave branded goodie bag

Prepare more questions than you need – but ask the key questions first

Write up notes as soon as possible

Share your insight with your company

Don't forget the **dull stuff** – number of employees, job titles, Google searches etc.

By far the most difficult part of conducting customer interviews **in person** is finding enough of the right sort of customer to talk to. Of course if you live in a city full of customers then this step is easy – start in your hometown!

But, if you have to travel you need to make the most of your visit:

1. Aim for **5 customer visits** in a 1 week trip,
2. Run a query on your CRM system to show you the number of your existing customers per city/region to **create an ordered list of areas**. You might need to fly to a given city or area, but you shouldn't need to travel too much *between* each interview.
3. Be smart about specific needs and risks, by speaking to your salespeople. The city of Chicago might show **15 possible visits**, but are they the right size? **Do your salespeople think it's appropriate to try and visit?** Use some common sense

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Dear <customer name>

I hope this message finds you well and that you are continuing to find <your product name> useful in your organization.

Our team will be in Denver from July 18th to July 22nd. It would be our pleasure to have the opportunity to meet with you during our visit. Our aim is to hear directly about your experiences with <your company name> products, gather your insights, and understand your suggestions, so that we can continue to develop the product in the right direction to help our customers in the best way possible. Note this isn't a sales visit! We just want to hear from you about your views on the products and suggestions for the future as we strive to tailor our products to better serve our customers.

We understand how valuable your time is, so we are flexible and happy to accommodate your schedule. Whether it's a coffee catch-up, a lunch meeting, or a visit to your office, we are open to whatever is most convenient for you.

Please let us know if you are available during this time and what time would suit you best. We are looking forward to the chance to discuss and further strengthen our partnership.

For any further information or queries, please feel free to reach out. I'm here to help.

Looking forward to our meeting.

Be polite – these people are doing you a favour

For various reasons it can be very difficult to get customers to agree to interviews. They might be away, they might be busy, they may have strict privacy rules. If an area shows 10 potential calls, you would be lucky to get half of those to even take a call, let alone accept a visit. You want to see your most valuable or interesting customers – but crucially, while you are on the other side of the country, **why not see everyone you can?**

This is where you need to be agile. You don't want to confirm a meeting somewhere then find out that the best location is on the other side of the US. I would advise against a broad mail shot instead approach customers in batches of 2 or 3. **If you get a couple of early wins in Boston, pursue that** and see if you can make that a hub for a visit. If not, move on to the next city.

Balance Value with Volume – be flexible

Here is my default list of questions. I start with this for each visit then adjust depending on who it is:

- 1.Name of org
- 2.How many employees
- 3.What industry
- 4.What does the company do
- 5.What's your role and job title
- 6.What is your biggest challenge
- 7.Could you describe what you think *<your company name>* does
- 8.Where did you first hear about us?
- 9.What do the terms *<"term 1, term 2, etc">* actually mean to you?
- 10.Who else did you consider?
- 11.Why us?
- 12.Which conferences do you go to?
- 13.What websites?
- 14.Any influencers
- 15.On social media?

Prepare more questions than you need – but ask the key questions first

Make sure you get all the details about the organisation, the department, the key persona, what Google searches they do, what event they attend, who is involved in the buying process, which countries they sell to, which compliance legislation they use and so on.

Don't forget the dull stuff

Lot of the great insights I have had from interviews to use have come from small details or offhand remarks. They might list a few interesting names products or features and you want to get all of that detail down.

Recording an interview is by far the best way of doing this. But you must ask first! Don't just put your phone down to record and assume.

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You might be from the marketing department, but you represent your whole company.

The customer is likely to have bought for a whole range of reasons, from functionality to sales process to support, to admin and communications, price and much more.

You might be a marketing person, but if that customer bought purely on innovative functionality, then that's what you need to hear about and talk about. Then you can take it back to the product team, help them and therefore help your company.

Cover all areas – marketing, sales, product, support, billing

It's great to bring a small gift to the company as a token of your appreciation. And it's nice for that to be something special or branded. Tote bags are great, notepads that sort of thing.

But don't spend too much and ask first if it is appropriate. Be aware of the anti-bribery legislation for example, I definitely wouldn't do this if working for a government agency. And even non-government organisations are very wary about taking gifts from vendors

If legal, leave branded goodie bag

Customer interviews are very tiring, and the temptation is to get back to your hotel room every night and sleep before the next day!

Resist this if you can. Your memory of the discussions will be at its best that evening so take your recording transcribe it and make edits there and then. One of the best things about in person customer interviews is the nuance and subtlety that you get, which you just never get from a written response.

This is why customer interview tours are exhausting.

Write up notes as soon as possible

The feedback you get is for your whole company. Once transcribed combat remove any personally identifiable information or anything else that could be considered private.

But then share as widely as possible in your company. You never know what gems you will have picked up that somebody in another department will be very thankful for.

Share your insight with your company

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