

The customer interview guide

How to run your first 10 customer interviews and turn what you hear into messaging

By Rachel Andrea Go

Why talk to customers first

When marketing and sales focus on what they want to say instead of what customers want to know, you lose out on revenue. Your analytics show what customers did. They can't tell you why. Before you write a homepage, a case study, or a sales deck, sit down with the people who already bought from you and ask how they got there. If you don't ask, you're working in an echo chamber. The words customers use on these calls become your headlines, your positioning, and your sales team's answers. This is the research step I run before any customer-led content work.

Who to interview and how many

- **Aim for at least 10 interviews.** That's the minimum I set for customer interview insights. More conversations give you clearer patterns.
- **Split them across your top, average, and worst customers.** Your best customers show you what to double down on. Your worst ones show you the blockers, and the poor-fit leads you want to stop attracting.
- **Include the unhappy ones.** Feedback from detractors is as useful as feedback from promoters, and it's where you find the hesitations.
- **Know whether you're talking to the buyer or the user.** At small and mid-sized businesses they're often the same person. At growing and enterprise companies they're usually different people: the buyer weighs budget, the user wants the job done. Interview both when you can.
- **Add prospects if you have them.** Email subscribers and contacts who haven't bought yet can tell you what's holding them back.
- **Start with recent customers.** Customers who signed in the last 6–12 months still remember how they made the decision.

After the first round, make it a habit. Set a goal to speak with a different customer at least once a week so your understanding never goes stale.

Recruiting

Get a warm introduction. Cold outreach makes it harder to build rapport. Ask whoever owns the relationship (sales, onboarding, or an account manager) to loop you in by email so the customer actually reads your ask.

Keep the ask short. Lead with how you're connected, say what you're doing in a sentence or two, name the time commitment, and make the next step obvious. Say plainly that it isn't a sales call.

Here's a version of the outreach message I've used, adapted for customers:

Hi [Name],

[Account manager] mentioned you've been working with us since [month]. I lead marketing at [Company], and I'm talking with a handful of customers about how they found us and what made them choose us.

Would you be up for a casual 30-minute call in the next two weeks? This isn't a sales call, and there's nothing to prepare. As a thank you, [incentive].

If you send over your meeting link, I'll find a time that works for you.

Thanks, [Your name]

Pick a scheduling approach. A booking tool like Calendly is the most convenient option for customers. When you're asking a favor, consider asking for *their* meeting link instead. I did this on an interview series because I didn't want to ask for someone's buy-in and their effort at the same time.

Track every ask. Keep a spreadsheet with each person's name, the channel you used, your first message, and the date.

What a hit rate can look like. When I recruited for a published interview series for a B2B eCommerce logistics client, 15 of the first 20 people I reached out to responded positively. I scheduled 11 within two email exchanges, and eight of those interviews happened over the following two weeks. Those were warm contacts in the client's network who were invited to be featured publicly, so expect your own numbers to differ.

Thank everyone. Reward every participant, including the ones who had critical things to say. Match the incentive to your audience. For that series, I used a gifting platform that let each person choose their own gift.

Before the call

- **Own the meeting invite.** If you're the organizer, you control the recording and the transcript.

- **Put three things in the invite:** a line of context ("This is a chat between [name] and [you] about their experience with [Company]"), your starter questions for reference, and a recording disclosure ("This call will be recorded").
- **Set expectations.** Tell them how to join, how long it takes, what you'll cover, how you'll use their answers, and that it's a safe space to be honest without judgment.
- **Record with permission.** Recording-consent rules vary by location, so check what applies to you and confirm consent again at the start of the call.
- **Do your homework.** Read their LinkedIn profile, their company website, and their history with you. Pick 8 to 10 questions from the bank below that fit this person.
- **Book 45 minutes for a 30-minute conversation.** Thirty minutes is enough for a good interview. The extra 15 covers small talk and thank-yous.
- **Send a reminder** with the meeting link before the call.
- **Review for 15 minutes beforehand.** Reread your questions and their background so you walk in knowing who you're talking to.

The question bank

This is a menu. Pick 8 to 10 per call, swap in your own product and function, and follow anything interesting. Keep every question neutral. "How much did you enjoy the product?" assumes they enjoyed it. "What was your experience with the product?" doesn't.

Their role

1. Tell me about your role and what a typical week looks like.
2. What are you measured on?
3. Who else on your team is involved with [function]?

Before they looked

4. Before [Company], how were you handling [function]? What tools or methods did you use?
5. What did you like and dislike about that setup?

The trigger

6. When did you first think you needed something new? What was going on at the time?
7. Walk me through the moment you decided to start looking.

Evaluating options

8. Where did you go first to look for a solution?

9. Where do you usually learn about what's happening in your industry? Which blogs, podcasts, newsletters, or people?
10. What other solutions did you look at, and how did you find them?
11. What made you cross options off your list?
12. What were you skeptical or unsure about when you first came across us?
13. What questions did you have that our website or sales team didn't answer?

The decision

14. Why did you decide to try us?
15. Who else had to sign off, and what did they need to see?
16. What would have stopped you from choosing us?

After buying

17. After you signed up, what told you whether it was the right call?
18. What can you do now that you couldn't do before?
19. Is the reason you signed up still the reason you use us? How have your needs changed?
20. What would you change or add?

Their words for the problem

21. What's the hardest part about [problem]?
22. How would you describe the ideal customer for [product]?
23. If a peer asked you what we do, what would you tell them?

Running the call

- **Treat it as a conversation.** Interviews feel stiff. Conversations build trust, and people answer more honestly when they're at ease.
- **Start recording the moment you join.** On my first interview I waited until the first question and missed good context. You never know what small talk will reveal.
- **Open with a thank-you and tee up your first question.** Jumping straight into question one sounds abrupt.
- **Use the follow-up.** Your most useful question will be "Could you elaborate on that?" or "Tell me more about..." whenever you hear something interesting.
- **Follow the tangent.** A passing comment can reveal a new use case or a competitor you didn't know about.
- **Mute yourself when you're not asking a question,** and keep your questions document and the call side by side so you aren't flipping between tabs.

- **Notice your filler words.** I learned I say "so" a lot.

What not to do:

- Don't pitch, upsell, or demo.
- Don't defend the product when they criticize it. Note it and ask what happened.
- Don't ask leading questions or suggest answers when they pause.
- Don't run past the time you promised.

After the call: turning answers into messaging

1. **Get the transcript.** Most call tools can record and transcribe automatically.
2. **Capture verbatim phrases.** Put every useful answer into a spreadsheet with the person's name, segment (top, average, or worst), and the exact words they used. Don't paraphrase. Answers to the trigger questions are especially useful for describing pain points in your audience's own voice.
3. **Highlight what repeats.** The words, phrases, struggles, and motivations that come up across several calls show what your customers have in common.
4. **Tag each insight** as a job-to-be-done, a buying trigger, a hesitation, a trusted channel, a reason they chose you, or a dealbreaker.
5. **Route each tag to where it does work:** - **Buying triggers** go into messaging, headlines, and campaign timing. Double down on the triggers your best customers share. - **Jobs-to-be-done** shape positioning and tell you which case studies to build. Write them as "When [trigger], I want to [desire], so I can [job]." - **Hesitations** become a list of common blockers for your sales team and content that answers them before they come up. - **Reasons they chose you** are the strengths to highlight. **Dealbreakers** are what to avoid. - **Trusted channels** tell you where to distribute and which channels to prioritize. - **Verbatim quotes** go to your marketing team as examples of how buyers talk. Get the customer's explicit approval before quoting them publicly by name.
6. **Turn insights into content ideas for each funnel stage.** As the first marketing hire at an eCommerce fulfillment startup, I saw webinar Q&As, newsletter replies, and inbound questions cluster on one topic. I built a six-part email course from content we already had, and it got 400+ signups in its first month.
7. **Compare against what you already have.** Lay your findings next to your current personas, website copy, and sales deck. Often the gap between the two is the insight.
8. **Close the loop.** Tell the customers you interviewed what you changed because of their feedback.

The one-page checklist

Plan

- ☐ At least 10 customers picked, split across top, average, and worst
- ☐ Buyers and users identified
- ☐ Incentive chosen for every participant

Recruit

- ☐ Warm introduction from the relationship owner
- ☐ Short ask sent: connection, purpose, 30 minutes, not a sales call
- ☐ Outreach tracked: name, channel, message, date

Prepare

- ☐ You own the invite, with context, starter questions, and a recording disclosure
- ☐ Expectations set, including how you'll use their answers
- ☐ 8 to 10 tailored questions chosen
- ☐ 45 minutes booked, reminder sent
- ☐ 15-minute review before the call

Run

- ☐ Recording on as you join
- ☐ Thank-you, then first question
- ☐ "Could you elaborate on that?" whenever something's interesting
- ☐ No pitching, defending, or leading

Use

- ☐ Verbatim phrases in a spreadsheet
- ☐ Repeats highlighted, insights tagged
- ☐ Each tag routed to messaging, positioning, sales, or channels
- ☐ Content ideas listed per funnel stage
- ☐ Findings compared against current personas and copy
- ☐ Thank-you sent, and participants told what changed