Customer Interview
Script & Toolkit

This toolkit provides everything you need to conduct effective customer interviews:

- Proven interview script with 20+ questions
- Follow-up questions for deeper insights
- Interview preparation checklist
- Note-taking template
- Analysis framework
- Email templates for outreach

Based on "The Mom Test" by Rob Fitzpatrick and best practices from Y Combinator

Ø=ÜË Before the Interview

Goals of Customer Interviews

- Understand the customer's problem deeply
- Learn about their current solution and workflows
- Validate problem severity and willingness to pay
- Gather insights for product development

The Mom Test Rules

Talk about their life instead of your idea:

- Ask about problems, not solutions
- Focus on past behavior, not future intentions
- Listen more than you talk

Preparation Checklist

' Research the interviewee and their company

' Prepare your questions (but stay flexible)

' Test your recording setup

' Have a note-taking system ready

' Schedule 30-45 minutes

' Send calendar invite with clear purpose

Ø=Ü¬ Interview Script

Opening (2-3 minutes)

Thank you for taking the time to speak with me today. I'm working on [general problem area] and would love to learn about your experience.

Before we start:

- This will take about 30-45 minutes
- I'm here to learn, not to pitch anything
- There are no right or wrong answers
- May I record this for note-taking? (Optional)

Section 1: Background & Context (5 minutes)

Q1: Can you tell me about your role and what you're responsible for?

Follow-up: What does a typical day look like for you?

Q2: What are your biggest priorities right now?

Follow-up: What metrics or goals are you measured on?

Q3: Walk me through your current workflow for [specific task]?

Follow-up: How much time do you spend on this per week?

Section 2: Problem Discovery (10-15 minutes)

Q4: What's the hardest part about [problem area]?

Follow-up: Can you give me a specific example of when this was a problem?

Follow-up: How did you handle it?

Q5: Tell me about the last time you encountered [specific problem]?

Follow-up: What did you do?

Follow-up: How long did it take?

Follow-up: Were you satisfied with the outcome?

Q6: What tools or solutions do you currently use to solve this?

Follow-up: What do you like about them?

Follow-up: What frustrates you about them?

Follow-up: Have you tried other solutions?

Q7: If you had a magic wand, how would you solve this problem?

Follow-up: Why is that important to you?

Q8: How much does this problem cost you?

Follow-up: In terms of time?

Follow-up: In terms of money?

Follow-up: In terms of missed opportunities?

Section 3: Solution Validation (10 minutes)

Q9: Imagine there was a solution that [describe benefit]. How would that change things for you?

Follow-up: What would you be able to do that you can't do now?

Q10: What would make you switch from your current solution?

Follow-up: What features would be must-haves?

Follow-up: What features would be nice-to-haves?

Q11: Who else is involved in decisions about [problem area]?

Follow-up: What would they care about?

Follow-up: Who would need to approve a purchase?

Q12: How much would you be willing to pay for a solution that [solves problem]?

Follow-up: What's your current budget for this?

Follow-up: How do you typically evaluate ROI for new tools?

Section 4: Closing (5 minutes)

Q13: Is there anything else about this problem I should know?

Q14: Who else should I talk to who experiences this problem?

Follow-up: Would you be comfortable introducing me?

Thank you so much for your time. This has been incredibly helpful. May I follow up with you as we develop a solution?

Ø=ÜÝ After the Interview

Immediate Actions (Within 1 hour)

- Write down key quotes and insights while fresh
- Note body language and emotional reactions
- Flag any surprising or unexpected responses
- Send thank you email within 24 hours

Analysis Framework

For each interview, document:

Problem Severity: How painful is this problem? (1-10 scale)
Current Solution: What are they using now?
Willingness to Pay: Would they pay for a solution?
Key Insights: What did you learn?
Feature Requests: What capabilities did they mention?
Red Flags: Any concerns or dealbreakers?

Pattern Recognition (After 10-15 interviews)

- What problems come up repeatedly?
- What language do customers use to describe the problem?
- What are common workflows?
- What features are consistently mentioned?
- Who is the most affected by this problem?
- What price range seems reasonable?

Ø=Üç Email Templates

Template 1: Cold Outreach

Subject: Quick question about [their problem area]

Hi [Name],

I noticed you work on [relevant area] at [Company]. I'm researching challenges that [job title] face with [problem area], and I'd love to learn from your experience.

Would you have 20 minutes for a quick call this week? I'm not selling anything - just trying to understand the problem better.

Thanks!
[Your name]

Template 2: Follow-up After Interview

Subject: Thank you + quick follow-up

Hi [Name],

Thank you for taking the time to speak with me yesterday. Your insights about [specific insight] were incredibly valuable.

A few key takeaways from our conversation:
• [Takeaway 1]
• [Takeaway 2]
• [Takeaway 3]

I'd love to keep you updated as we develop a solution. Would you be open to me reaching out in a few weeks?

Best,
[Your name]

& þ Common Mistakes to Avoid

'L Talking About Your Idea Too Early

Problem: Leads to biased feedback and validation seeking.
Solution: Ask about their problem first. Only mention your idea at the very end, if at all.

'L Asking "Would you use this?"

Problem: People are overly optimistic about hypothetical futures.
Solution: Ask about past behavior: "How did you handle this last time?"

'L Leading Questions

Problem: "Don't you think X is a big problem?" biases the response.
Solution: Use open-ended questions: "Tell me about your experience with X."

'L Taking Compliments as Data

Problem: "That's a great idea!" means nothing.
Solution: Look for commitments: time, money, referrals.

'L Skipping the Awkward Questions

Problem: Not asking about money or problems with current solution.
Solution: These are the most valuable questions - don't skip them.

' Signs of a Good Interview

- You learned something unexpected
- They gave specific examples and stories
- You got introduced to other potential customers
- They asked when they can try the product
- They offered to pay or pre-order