DEPLOY EMPATHY

A PRACTICAL GUIDE TO INTERVIEWING CUSTOMERS

MICHELE HANSEN

DOTSQUARE PRESS

Copyright © 2021 Michele Hansen.

All rights reserved.

Cover design by Damien Terwagne.

Scripts, templates, and phrasing may be used in customer conversations, emails, or other direct customer interactions without attribution. (For the purposes of this notice, "customer" refers to a person who currently, previously, or who could plausibly pay for or use a product or service.)

Any public or presentation contexts, such as posting to a blog, newsletter, podcast, talk, presentation, book, or other situations that are not direct customer interactions require attribution.

Using, adapting, and sharing the scripts within a company or consultant-client relationship is permitted and indeed encouraged. In the case of a consultant-client relationship, attribution is required.

I hate wasting time and writing code that never gets used. The only way I've found to truly avoid that when building my SaaS apps is to talk to the people I want to have as customers. *Deploy Empathy* takes the anxiety out of having these conversations so you can get honest thoughts about what you're trying to accomplish.

- MICHAEL BUCKBEE, FOUNDER, EXPEDITED SECURITY

Deploy Empathy is an essential field guide for anyone working close to product and customers. The book is filled with practical advice on customer interviews with Michele's unique ability to not just explain the how but also the equally important why. Learning from her experience is like taking a master class in nurturing product insights out of potential and existing customers. There is truly something for everyone involved in the product lifecycle.

- JOSH HO, FOUNDER, REFERRAL ROCK

Over the last 15 years, I’ve helped developers sell software and marketers to build software. Convincing them to talk to customers and really listen to customer problems has always been a challenge. *Deploy Empathy* is the instruction manual for customer interviews I’ve always wanted. Finally, I can direct my clients to scripts and techniques they can use to learn more directly from their customers. Many of them would have saved months, some hundreds of thousands of pounds, had they applied the practices in this book.

- JONATHAN MARKWELL, SMALL SAAS ADVISOR, PLAINSCALING

Michele’s expertise and knowledge in customer interviews have been instrumental in shaping the way we launch new products and features. Before reading *Deploy Empathy,* I thought I was pretty good at talking with our users and translating those conversations into useful features. After applying some of her interviewing techniques, the feedback has become so much richer and illuminating. It is helping to shape our long term strategic objectives, not just setting immediate goals.

- MATTHEW LEHNER, CO-FOUNDER & CTO, ONEFEATHER

Doing customer interviews right is an art. It takes practice and skill to think on your feet to ask the right questions. Michele nails it on her podcast, *Software Social,* and especially in this book. I'm a long-time believer in talking to customers, and now I feel I have the techniques to get the best results.

- ROB BAZINET, FOUNDER, STILL RIVER SOFTWARE

"If I can do this, you can."

Apparently, the first time I uploaded data to Geocodio was June 28, 2016, so that had to be the year I experienced my first customer interview with Michele. I wonked out on her about pulling in Census data. Now, I'm the smallest of small-time users until now because my products didn't launch, but I'm building my third one and it looks like this bird will fly.

So, who did I track down to follow and emulate? Michele Hansen of Geocodio. What did I find? Her advice on doing customer research—a task that always made me meltdown whenever I thought about it. Her advice helped me understand that I'm actually excited to do customer research because I love talking about the problem with this product because I am receiving responses from people who actually feel the pain my product will relieve. Maybe one day I'll graduate to a gentle tone and simple questions, but until then I'm looking forward to culling the information I learn while talking to them.

- ANDREA BRICE, TECHNICAL HEAD AND FOUNDER OF WILLOWFINCH

In an ever-increasing automated world, *Deploy Empathy* is a humane, practical, and actionable manuscript, full of tools you can use right away to listen to your customers with empathy. It is a solid way to make better-informed business decisions all while turning customers into advocates.

- DAMIEN TERWAGNE, CO-FOUNDER, DAWN

Michele's writing is amongst the very best in the SaaS space at the moment. It's different. Where other books teach the “what works,” *Deploy Empathy* will put you in your customers’ shoes and teach you the all-important “why” behind what you're asking. As a developer who is currently attempting to validate a few ideas, understanding exactly how to approach people in a way that doesn't come across as a hardcore sales pitch has been a massive help, and this book gives you the exact words and techniques you need to use to get the best results. Without a doubt, *Deploy Empathy* has already saved us countless hours of coding something nobody actually wants.

- DARIAN MOODY, ENGINEERING LEAD AND CO-FOUNDER OF A COMPANY IN THE DISCOVERY PHASE

Deploy Empathy is a delightful resource for anyone who needs to get people to share sophisticated, important things about their work and business. It is a showcase of clever, fundamental, and—most importantly—learnable conversation skills.

Before reading *Deploy Empathy*, I thought that a long silence in an interview was an awkward pause. But Michele taught me that silence is just the sound that tremendously valuable information makes just before it arrives. Since reading the book, I’ve begun to revel in the so-called awkward pause, instead of fearing it.

- DANIEL BECK, FREELANCE TECHNICAL WRITER

This book prompted me to have my first customer call, and I learned so much! I found myself wanting to insert my own thoughts and opinions so many times—I didn't realize how often I did that until I consciously held back. But I did hold back, and it resulted in my customer opening up a whole lot more. Mirroring and summarizing is also such a power move. *Deploy Empathy* has been so helpful already, and this is only the beginning.

- ADAM MCCREA, FOUNDER, RAILS AUTOSCALE

CONTENTS

PART 1
USING THIS BOOK

1. EMPATHY IS A LEARNABLE SKILL 3
   What is empathy? 5
   Empathy for customers helps companies of all sizes 6

2. THE NEUROSCIENCE OF LISTENING 8

3. WHY I WROTE THIS BOOK 10
   How I got started with all of this 13

4. WHAT THIS BOOK CAN HELP YOU DO 15

5. HOW THIS BOOK IS STRUCTURED 17
   Part II: Key Frameworks 17
   Part III: Getting Started 17
   Part IV: When Should You Do Interviews? 18
   Part V: Recruiting Participants 18
   Part VI: How to Talk So People Will Talk 18
   Part VII: Interviews 19
   Part VIII: Analyzing Interviews 19
   Part IX: Pulling It All Together: Sample Interview and Analysis 19
   Part X: What Now? 20
   Appendix A: Cheat Sheet 20
   Appendix B: For Founders 20

PART 2
KEY FRAMEWORKS

6. EVERYTHING IS A PROCESS 23
7. THE CORE QUESTIONS 26
8. FUNCTIONAL, SOCIAL, AND EMOTIONAL 28
9. VALUABLE, USABLE, VIABLE, AND FEASIBLE 30

PART 3
GETTING STARTED

10. YOU—YES YOU—CAN DO THIS 35
It's okay if you're afraid you won't get anything useful out of talking to customers 37
It's okay to have doubts about whether you can do this 37
It's okay if you find the prospect of talking to people scary, difficult, awkward, or just plain exhausting 38
If you tend to excitedly offer your own ideas 39

11. LEARN HOW TO INTERVIEW: A STEP-BY-STEP GUIDE 42
Step 1: Read the "How to Talk So People Will Talk" section. 42
Step 2: Do a practice interview. 43
Step 3: Analyze the practice interview for what you learned *and* how you conducted it. 43
Step 4: Interview one person, then a few more. 44
Step 5: Analyze your interviews. 45
Step 6: Make interviewing a regular part of your process. 46

12. PRACTICE INTERVIEWING—NO CUSTOMERS NEEDED! 47

13. PRACTICE INTERVIEW SCRIPT 50
Practice Interview Questions 52

PART 4
WHEN SHOULD YOU DO INTERVIEWS?

14. INTERVIEWS OR NUMBERS? 55
Selecting the right tool for the job at Stripe 56

15. PROJECT-BASED RESEARCH 57
Targeted Research at Stripe 58

16. HOW MANY PEOPLE SHOULD YOU TALK TO? 60
Participant diversity 61

17. RESEARCH LOOPS 63

18. ONGOING RESEARCH 65
Ongoing research at Stripe 65
Short surveys with a follow-up question 66

New customers 69
Happy customers and canceled customers 70

PART 5

RECRUITING PARTICIPANTS

19. REDDIT AND FORUMS 75

20. TWITTER 80
Replying to tweets about the problem 81

21. LINKEDIN 83
22. FACEBOOK GROUPS AND EMAIL LISTS 86

23. EMAIL 88
Templates 90

24. SURVEYS 91

PART 6

HOW TO TALK SO PEOPLE WILL TALK

25. USE A GENTLE TONE OF VOICE 99

26. VALIDATE THEM 101
Validating statements 103

27. LEAVE PAUSES FOR THEM TO FILL 105
28. MIRROR AND SUMMARIZE THEIR WORDS 109
29. DON’T INTERRUPT 112
30. USE SIMPLE WORDING 114
31. ASK FOR CLARIFICATION, EVEN WHEN YOU DON’T NEED IT 116
32. DON’T EXPLAIN ANYTHING OR GET DEFENSIVE 120
33. BUILD ON WHAT THEY SAY 122
34. LET THEM BE THE EXPERT 124
35. USE THEIR WORDS AND PRONUNCIATION 129

36. ASK ABOUT PAST OR CURRENT BEHAVIOR 132
What to say instead of “What are your pain points?” 133
Alternatives to "What are your problems?" 134
The questions to use to ask about problems 135
Alternatives to “What do you need?" 136

37. BE A RUBBER DUCK 138

PART 7

INTERVIEWS

38. INTERVIEW PREPARATION 143
Conduct interviews over audio (and screen share only when necessary) 143
Mute your phone and notifications 144
Set yourself up to be able to focus 144
Aim for five people; repeat in cycles of five with a narrower scope if necessary 145
It's okay if the interview doesn't follow the exact question order 145
Stick to the amount of time you've told them it will take 146
Always write a thank-you note 146
Provide an incentive or send a thank-you gift only when appropriate 147
Always ask for permission before recording 148
Deal with the legal stuff, if relevant 150
Decide on a way to capture the information in advance 151
Capture any feature requests 152
Ask others to join you (either during the interview or for analysis) 152
Don't do more than two interviews in a day 153
Use appropriate formality 153
Never sell them on the call 154

39. HOW CAN I EVALUATE THIS IDEA? 156
Right Problem, Wrong Stakeholders 157
Evaluating an idea 158
Where this fits in the process 158
Customer/problem discovery script template 159
What's next? 161

40. WHY DID THEY BUY? 162
Switch script template 163

41. WHY DO THEY STICK AROUND? 166
Long-time customer interview script template 166

42. WHY DID THEY CANCEL? 170
The pain of cancellations 171
Special notes for cancellation interviews 173
Canceled customer interview script template 174

43. WHAT DO THEY THINK? 177
Special notes for interactive interviews 181
Avoid the word ‘confusing’ 183
Interactive interview script template 184

44. WHAT TO PRIORITIZE? 188
Example Card Sorting Activity 189
Card sorting interview script 190

45. THE “REACHING FOR THE DOOR” QUESTION 192

46. HOW TO ASK PEOPLE HOW MUCH THEY WOULD PAY 197
Analysis 201
The questions to ask 202

47. DEBUGGING INTERVIEWS 204
No-shows 205
Interviews are shorter than expected 206
The person seems nervous 207
The person is giving short answers 207
The person is being cagey 208
The person just wants to talk about feature requests 209
They expected onboarding 210
Multiple people are on the call from their side 212
They're talking about something unrelated 213
They're mad about something 214

PART 8
ANALYZING INTERVIEWS

48. DRAWING A SIMPLE CUSTOMER JOURNEY MAP 219

49. THE PAIN AND FREQUENCY MATRIX 222
Practice this now 225
Using this to analyze interviews 227
What this model tells you (and what it doesn't) 228

PART 9

PULLING IT ALL TOGETHER: SAMPLE INTERVIEW

50. SAMPLE INTERVIEW TRANSCRIPT 231

51. SAMPLE ANALYSIS 240
  What he's trying to do overall and where the problem the product solves sits 240
  The steps of the decision process, from trying something else, to struggling, to switching, to being satisfied using it 241
  The intellectual, social, and emotional dimensions that influenced the decision-making and his product satisfaction 243
  Pain, Frequency, and Willingness to Pay 245

52. QUICK ANALYSIS 247
  Immediate actions 247
  Longer-term thoughts 249

PART 10

WHAT NOW?

53. RELATED TOPICS 255
  Starting a business 255
  More rigorous customer research 256
  Processing and disseminating results 256
  Quantitative research 257
  Usability or Accessibility 257

54. FURTHER READING 258

Appendix A: Cheat Sheet 263

APPENDIX B: FOR FOUNDERS

55. RESEARCH AS A SOLO FOUNDER 269

56. FEATURE REQUESTS AS CUSTOMER RESEARCH 271
  Feature Request Response Template: Phone 273
  Feature Request Response Template: Text 274
  Cataloguing feature requests 275

57. SALES, CUSTOMER SUPPORT, AND CUSTOMER RESEARCH 277
Customer support is not customer research 278
Sales is not customer research 279
In conclusion 280

58. CUSTOMER SUPPORT 282
The grumbling users 283
Template: you messed something up, and someone is unhappy 285
You've messed something up, and they're upset 289
Someone thinks you did something wrong, but you haven’t 290
Someone is insulting you 291
Someone reports a bug 293
They're having an installation/integration issue 294
It's not all bad 294

59. RESEARCH FOR GOAL SETTING 296

Notes 299
Thanks 305
About the Author 307

[PART 1]

USING THIS BOOK

[1]

EMPATHY IS A LEARNABLE SKILL

Your time is too valuable to spend it creating things people don't want.

As counterintuitive as it may seem, talking to people can save you months or years of frustrating, fruitless effort.

You might be afraid that talking to customers (or potential customers) will be a waste of time. That they will only tell you things you already know. Or, worse, that it will be awkward and you'll accidentally offend people.

That's okay.

But you also might be looking for new opportunities. You might be wondering why people cancel. You might be wondering how to get more people to buy. You might be trying to figure out which features to add next. And your data may not be giving you clear answers.

> A spreadsheet of data can tell you *what* is happening, but it will never tell you *why*.

This is where adding customer interviews to your skillset can help.

This book will teach you how to deploy empathy in a specific, targeted, and structured way to pull opportunities out of customers that you and your competitors didn't even realize were there. People will tell you things—useful, actionable things—that you never would have found before.

Even if you have never interviewed customers before.

Even if your company doesn't exist yet.

Even if your company has been around for decades.

Even if you don't think you have time for interviews and only talk to customers in support or sales settings.

The skills you will learn can be used with potential customers, former customers, current customers, clients, stakeholders, people you advise, and even in your personal life.

You will walk away from this book with a toolbox of repeatable processes that will allow you to find opportunities and moments of unexpected insight time and time again.

The opportunities you find can be used across any part of a business—from what to write on landing pages to which features to prioritize to what kind of pricing model to choose to who your real competitors are.

To find those opportunities, you will first learn a set of conversation techniques that will help you listen with empathy and intention. It's okay if the ways of speaking presented in this book are unfamiliar to you. While it may come naturally to some, for many empathy is a learned skill.

But before you learn how to deploy empathy in customer interviews, let's address a common objection. Interviewing customers may sound squishy and subjective. It may sound like a "nice to have" rather than a critical part of a business.

So don't just take my word for it.

Writer Morgan Housel, one of the best business writers of our time, wrote in *The Psychology of Money*:

> "In a world where intelligence is hyper competitive, and many
> previous technical skills have become automated,

> competitive advantages tilt toward nuanced and soft skills, like communication, empathy, and perhaps most of all, flexibility."[1]

Fortunately, anyone can learn the skills mentioned by Housel. According to Brené Brown, "Empathy is best understood as a learned skill, because being empathetic, or having the capacity to show empathy, is not a quality that is innate or intuitive."[2]

WHAT IS EMPATHY?

As defined by design strategist Indi Young in *Practical Empathy*, empathy is "about understanding how another person thinks, and acknowledging [their] reasoning and emotions as valid, even if they differ from your own understanding."

In this context, empathy means entering the other person's world and understanding that their decisions and actions make sense from their perspective. As put plainly by former FBI Chief Hostage Negotiator Chris Voss in *Never Split the Difference*, "The beauty of empathy is that it doesn't demand you agree with the other person's ideas."[3] It is similar to the concept of "beginner's mindset": suspending your own preconceived notions before entering a situation to uncover new information that you would not have come across had you kept only your own ideas in mind. This suspension of judgment is critical for finding problems that you may not have realized existed.

Learning empathy alone—aside from applying it to product development, marketing, and business strategy—is also something that can make you a better leader. According to Brené Brown, "In the growing body of empathy research, we are finding that successful leaders often demonstrate high levels of empathy; that empathy is related to academic and professional success; that it can reduce aggression and prejudice and increase altruism." [4]

I encourage you to try these techniques with friends and family before talking to customers. With practice, the listening techniques and frameworks you'll find in this book will become second nature.

It is worth taking a moment to differentiate between empathy, sympathy, and solution-based responses. For example, if someone says, "My boss yelled at me today!" a sympathetic response would be "I'm sorry that happened to you" (which creates distance between the original speaker and the person replying), and a solution response would be "You should get a new job," which comes from a good place yet changes the subject away from the person's experience. By contrast, an empathetic response might be "That really hurt you," which encourages the person to expound on their experience. Regardless of your natural inclination, it is my belief that everyone is capable of adding empathetic responses and exploration paths to their communication toolbox.

EMPATHY FOR CUSTOMERS HELPS COMPANIES OF ALL SIZES

Your customers (or potential customers) have a wealth of insights for you, and you just need to ask them.

When you understand the details of why and how someone embarks on a process, you can then see where opportunities may lie.

That awareness of more opportunities—from new products to marketing existing ones to strategy and more—is why more and more companies have integrated listening to customers directly into their decision-making processes.

Payment processor Stripe is a notable example. According to Stripe product manager Theodora Chu, "at Stripe, the very first question you'll get for any product proposal is, 'Who are the users, and what do they care about?'" Stripe not only integrates customer research into the core of their decision-making, they also encourage entire teams—developers included—to interview customers directly.

I've had the privilege of being interviewed by their product managers, developers, and designers myself. Says Chu, "you're expected to talk to users throughout your time at Stripe, regardless of function."[5]

You'll read vignettes from Stripe's customer research practices throughout this book, as well as examples from my own company, Geocodio, and from founders at different stages. What all of these companies have in common—from small side projects to one of the most admired technology companies in the world—is that customers are integrated into their decision-making and everyday work processes.

Unfortunately, actively listening to customers is a resource that many companies overlook. Many large businesses have research arms, yet they are often insulated from the rest of the company. There is substantial value in having developers, product managers, marketers, and other functions—besides researchers—interview and interact with customers. Companies that insulate research—or, worse, neglect it entirely—leave that valuable resource completely untapped to their own detriment.[6] But that, in turn, creates an opportunity for competitors that are willing to do the work to understand customers.

You are therefore creating an advantage for your company just by having empathy for your customers and being open to listening to them.

[2]

THE NEUROSCIENCE OF LISTENING

Over the thousands of interviews I've conducted, I've found that customers we interview tend to become our most vocal supporters. The customers we've interviewed go on to be the ones who passionately share the word in their networks. The customers we've interviewed are the most likely to offer to do a testimonial, even without us asking.

Most of us are so used to being ignored by companies that when we find one that listens to us—and genuinely listens to us—it's startlingly refreshing. It makes people want to go out of their way to see that company succeed.

There is a deeper neurological reason why this happens.

According to functional magnetic resonance imaging brain studies, parts of the brain associated with motivation, reward, and enjoyment light up when people talk about themselves and their experiences with another person.[1]

Being listened to makes people feel happy, and the person talking associates those positive feelings with the person and concept they're talking about. In the case of a customer interview, that means those happy feelings get transferred to you and in turn, your company.

The mere act of listening alone is powerful. I want you to remember that study when you find yourself wondering whether you're asking the right questions, your interviews are long enough, or whether you're analyzing them in the right way. (Later on, we'll address each of those concerns.)

Just listening to customers alone has benefits for you and your company. Even if you do nothing with what you've learned afterward.

[3]

WHY I WROTE THIS BOOK

People often ask me how my husband and I have been able to grow our software company, Geocodio, to over one million dollars in annual revenue without external funding.

Do you want to know the secret?

Here it is: listening to customers is embedded in everything we do. Listening to customers is the cornerstone, foundation, and pillars of how we make decisions. By listening to customers and learning their processes, we learn how to get and retain customers by helping them accomplish things faster, cheaper, and easier.

Hearing that, people then wanted to learn how to interview customers themselves. I didn't feel like I had one solid place to send them, and I would find myself typing out long emails that were a mix of chapters of books, podcasts, and blog posts, with my own perspectives spliced in. (As you'll learn in this book, repeated manual work like that is a symptom of pain that can be solved by a product. In this case, a book.)

Most resources on customer research are only partly relevant to people trying to start or grow businesses and are written for user experience professionals. I needed a resource that presumed no previous experience with customer research and was also biased toward action.

This book is specifically intended to fill two gaps in the existing (and wonderful) body of work on customer research, much of which I reference throughout this book.

The first is specific words, phrases, and scripts to use when talking to customers, whether in an interview setting or support setting. Many books mention phrases and tactics, yet they often do not get into the nitty gritty of exact questions to ask in specific situations to the extent that would be needed by someone who has zero customer research training. The idea of this book is that, if you had to, you could read How to Talk So People Will Talk to get an idea for how to get people to open up, and then take one of the scripts into an interview with only minor adjustments. It is designed to be grab-and-go.

Second, with the exception of *The User Experience Team of One*, many of the books on user research are written with large, well-resourced teams in mind.

If you're in a team setting, I suggest using this book in tandem with *The Jobs to Be Done Playbook* by Jim Kalbach. Steve Portigal's *Interviewing Users* is excellent for those who have the resources and ability to meet with customers in person. Consultants might look to Erika Hall's *Just Enough Research*, which is written from a design agency perspective.

This book attempts to make customer research methods accessible to even the smallest of companies—including companies of one, in software entrepreneur Paul Jarvis' words.

Paul Jarvis' *Company of One* is one of the most influential books in the world of small software companies. Rob Walling's *Start Small, Stay Small* and Arvid Kahl's *Zero to Sold* are also part of that canon.

The sparking motivation for this book was to offer a way to help founders and prospective founders, often developers, run their own companies with customer understanding built into the core of their decision-making process. Building products and features that people don't want is *painful* and if people knew how to talk to customers and potential customers to get useful information, they wouldn't have to go through that.

Trying to introduce customer perspectives into the product development process later on in a company's lifecycle can be painful, too.

Anyone who has tried to introduce customer research into a company that makes decisions without talking to customers knows just how much of a slog it can be.

Cindy Alvarez's *Lean Customer Development* is written from the perspective of a product manager and has specific tips for introducing customer research into a resistant organization. If you are in that situation and have skeptical higher-ups, read Alvarez's book yourself and try to get your leadership to read one of Clayton Christensen's books, which are written from a high-level, executive-friendly perspective.

But what if more companies were built with customer empathy from the very beginning? Retrofitting customer research into the organization wouldn't be necessary, because it would already be baked in.

In the early days of Stripe, founders Patrick and John Collison personally answered support emails and watched users integrate the product.

According to Stripe product manager Theodora Chu, "they built up a strong sense of 'What do developers want? And how do we make our APIs better by virtue of spending time with developers and watching how they use our APIs." As a result, user research is something that's "baked into Stripe's DNA" because it's been there from day one.

And it still is for new employees. "One of the first things you do when you join Stripe is you try and answer a support ticket, and you try and help a user through their pain point…We care a lot about people who are focused on users in general. You're expected to talk to users throughout your time at Stripe, regardless of function."[1]

It is my grand ambition to help people learn how to listen to customers and integrate it into their workflow from the start. While they are only one group of readers of this book, I believe that developers and makers are the next huge wave of founders. Demystifying the skills to pull wants and needs out of potential customers would save them hours, months, and years of pain.

HOW I GOT STARTED WITH ALL OF THIS

Before I was a software entrepreneur, I was a product manager at a mid-size company. We'd look at analytics and talk to customer service and then make educated guesses about what we needed to do to a product to get the metrics to go in the right direction.

Even though I was a frequent visitor in the customer service department, it never occurred to me that we could talk to customers directly.

I remember the first time someone suggested the idea of user testing our products before we launched them. “How are we supposed to find time for that?” I thought to myself. A week of user testing and then another two weeks of tweaking based on that feedback just wasn't in the cards for our hectic four-to-six week product launch cycles.

It was only later, as my mind became more open to qualitative research and I had my own “Aha!” moments while talking to customers that I learned that it is absurd to start customer research the week before launch—because it needs to happen much sooner, as part of guiding the development of the product.

I saw for myself how it can improve product roadmaps, increase team motivation, and get numbers moving in the right direction.

Talking to customers was a revelation.

Practicing and applying empathy didn’t come naturally to me, and it’s something I’ve had to learn.[2] I was fortunate enough to learn customer research under the wing of an experienced design leader and a PhD user researcher. I observed their interviews for months before conducting my own.

It took me a long time to realize the value that can come from listening to customers and how to do so in a way that leads to results, and I try to keep that in mind whenever I'm talking about this.

If you’re new to this, you may not believe me until you start seeing the results and having those “Aha!” moments of learning for yourself. I recognize that interviewing customers and integrating them into your decision-making is a mental leap for a lot of people.

Let’s embrace your doubt. I accept that you may be worried that this will be a waste of time. If you follow the methods outlined in this book, you will get useful feedback out of your interviews and you can stop spending time on things that people don’t want. You’ll get there, and this book is your step-by-step guide.

[4]

WHAT THIS BOOK CAN HELP YOU DO

Perhaps you find yourself, either now or at other times, needing to do one of the following:

- Launch a product
- See if people would pay for something
- Understand why people are canceling
- Know why people *are* buying, so you can find more customers
- Determine which features to add next
- Figure out how to keep customers and why people buy again

If any of those apply to you, this book is for you.

This book is intended to make the tribal knowledge about talking to users that is largely constrained to the user research community accessible to a much broader audience.

This book is written for people who do not come from a user experience background. That includes everyone from developers to product managers to marketers to founders.

If you do have experience with interviewing, this book's primary usefulness to you may be as a resource to recommend to developers, product managers, and other team members as an introduction to interviewing that is approachable yet rigorously grounded.

This book is in part inspired by a line in veteran user researcher Steve Portigal's book *Interviewing Users*: "Much of this presumes that the fieldwork team is assembled from two types of people: those who are likely to be reading this book, and those who wouldn't even have imagined a book like this existed." This book is written with that latter group in mind. It is intended to be an approachable introduction that is heavy on practical application.

[5]

HOW THIS BOOK IS STRUCTURED

This book is organized linearly. It starts with mental models for thinking about customer problems, to figuring out when to do research, to recruiting participants, to preparing for interviews and creating a script, then to analyzing interviews and taking action.

But just because this book is organized linearly doesn't mean you need to read it linearly. This is intended to be a practical guide, so feel free to skip around and make it useful for yourself. (See Appendix A for the non-linear reading guide.)

PART II: KEY FRAMEWORKS

There are several underlying ideas and mental models that are referenced throughout this book. This book isn't heavy on theory, yet it's important to have these highly-actionable models in mind as you conduct and analyze interviews.

PART III: GETTING STARTED

Customer interviews are very, very different from the interviews you might observe in daily life. It's more like how a therapist talks to their patients than a journalist on TV.

This part is a step-by-step guide to interviewing like a user researcher would and will help you build up your skills before talking to prospective, current, and former customers or clients.

If you've already interviewed a customer or ten, you can probably skip this section and go right on to Part IV.

PART IV: WHEN SHOULD YOU DO INTERVIEWS?

This section introduces a mental model for thinking about when to do interviews: project-based research (when you have a specific problem you're trying to figure out) and ongoing research (for building and updating your general understanding of customer needs). I use this framework for my own research, and it's also used by Stripe.[1] You'll find your own research flow, and I present this model as a starting point to help you figure out when interviews are the right tool for the job.

PART V: RECRUITING PARTICIPANTS

The next part walks you through one of the biggest challenges for people at first: finding people to talk to, especially if you don't have any customers. You'll get specific copy to use to find interview participants on Reddit, Twitter, LinkedIn, Facebook, and email lists. If you already have customers, it includes copy and questions to use via email and short surveys.

PART VI: HOW TO TALK SO PEOPLE WILL TALK

How to Talk So People Will Talk is the most important part of this book.

Interviews are more like acting than a conversation, and this part will teach you specific tactics to use to help people open up and talk about relevant topics.

If you are pressed for time, read this part and then skip to Appendix A to get power packs for specific situations.

PART VII: INTERVIEWS

This is the part you will probably reference the most in the future: the essentials of interviewing. This part gets into the nuts and bolts of interviews and includes scripts for specific scenarios (like cancellation interviews, testing a prototype, or when you're in the early stages and exploring a problem). It also includes deep dives on specific questions, like how to ask someone what they would pay.

If you're one to skip around: Do not start using the scripts before reading How to Talk So People Will Talk.

Interviews don't always go according to plan, and that's okay. In the last chapter of this part, "Debugging Interviews," you'll get guidance on what to do in some common situations and how to recover.

PART VIII: ANALYZING INTERVIEWS

After that, it's time to dive into analysis methods. This part will introduce you to a simplified version of a customer journey map (it's okay if you don't know what that is) and a matrix for determining which problems and tasks might be good opportunities.

PART IX: PULLING IT ALL TOGETHER: SAMPLE INTERVIEW AND ANALYSIS

This section shows you the interview tactics in action and walks through different ways of analyzing interviews, including a long-form version and an analysis for when you're low on time.

PART X: WHAT NOW?

Here, you'll find further resources. This book has a narrow focus on the interview skills and tactics that are glossed over in other books. Accordingly, there are a lot of important topics that are intentionally excluded, and this part is a launchpad for exploring those other topics.

APPENDIX A: CHEAT SHEET

Appendix A is your handy guide to skipping around this book. Trying to figure out what to build? Need to know why people cancel? This section has power packs of chapters for specific purposes to make it easy to get the answers you need and get to work.

APPENDIX B: FOR FOUNDERS

Appendix B is specifically for founders of small software companies. It includes discussion of common customer support situations, turning feature requests into research, the differences between support, sales, and research, and one way to use customer research as part of goal setting.