Customer Discovery Interviews

Mariam Hambarchyan

Behavioral Scientist

AgriTech Accelerator

7/20/20

Research Process

Study planning and design

- Identify the **scope** of the study and document it thoroughly
    - Timeline
    - Resources in terms of costs and tools
    - Team: *exactly* who is responsible for what
    - Objective and goals: critical and nice-to haves
    - Milestones and check-ins (and do a postmortem at the end)
    - What deliverables are expected

- **Design**
    - Identify the iterations/prototype version you want to test
    - Clearly define exactly what conditions you want to compare to each other (if applicable)

Recruiting

- As much as possible, recruit potential customers to be your research participants, using the same channels you would use to sell your product

- If you have a product, talk to or test with:
    - Churned users (most critical)
    - Existing users who are happy
    - Power users
    - Any user who has changed behavior: using your product more or less

Conducting analyses and reporting findings

- Exploratory and confirmatory analyses

- Look for trends and themes in interviews and code anything that can be turned into quantitative data to analyze and visualize it

- Analyze quantitative data like comparing means and visualize it, using Excel, R, Phyton, etc.

- Create a report to share with team – slides work best

After you collect data, record it well

- Each row is a user, so you can easily sort
- Each column is a variable, that can be qualitative or quantitative
  - Name of user
  - Persona
  - Rating or ranking scores
  - Interview questions (keep their exact words in long form, make the cells large and wrap text)

Continuous User Feedback Loop

Mastering *customer obsession*

100
We built it, but they didn't come

200
We got out of the building and talked to our customers

300
We analyze metric dashboards weekly & commission well-designed research studies

400
We have a continuous feedback process with a feedback river, feedback system of record, and deep synthesis

Sachin Rekhi

Why 300-level customer obsession is *not enough*

Metrics can help identify what's wrong, but <u>not why</u>

Research studies are infrequent & quickly <u>out-of-date</u>

Sachin Rekhi

Continuous user feedback river

- User-centered & user-obsessed product development = success

- Do user research early and continuously
    - One set of discovery interviews or a couple of surveys done once is NOT enough, user research should really be in your company's DNA, as a continual quest to understand the user and deliver value with solutions that address their pain points

- Create a #user_research Slack channel to discuss all things related to research planning and execution

- Separately, streamline sharing all user feedback by making a #user_feedback channel to establish a feedback river — an open channel for any team member to get continuous real-time feedback on the product across a multitude of sources

Sachin Rekhi

What goes in the #user_feedback channel?

- User research study findings – interview notes, survey results, usability tests
- Satisfaction tracking – NPS, Sean Ellis Test, satisfaction scores
- Usage metrics dashboards and analytics
- Sales or download data
- Churn data and cancelation reasons
- Feedback from your customer success team
- Contact us feedback submissions
- Feedback in social media and reviews from the app store
- Internal testing employee feedback
- Feature requests
- Help search queries

Sachin Rekhi

Feedback system of record and deep synthesis

- The data in the #user_feedback Slack channel is used to create a feedback system of record – a single source of truth for consolidated and aggregated feedback across a multitude of sources
    - Speeds up processing of feedback
    - Easier to incorporate into roadmap
    - Avoids recent feedback bias

- Use whatever record tool that is best for you and keep feedback summaries light-weight and actionable

Tools for feedback systems of record

Google Sheets   X Excel

Trello   Atlassian JIRA   asana

salesforce   Aha!   WIZELINE

Sachin Rekhi

What feedback do I act on?

- Is it from your right target market?

- Which persona do you actually want to focus on?

- Does it fit with your current business needs?

- Be careful with listening to what "users say they want," and, instead, listen for their actual needs and pain points

If I asked people what they wanted

"wanted"

they would have said

"faster horses"

-- Henry Ford

Personas

- Representations of a cluster of users with similar pain points, behaviors, goals, attitudes, and motivations

- Fictional, yet still realistic human-like snapshots of relevant and meaningful commonalities developed based on rich qualitative user research

- 3 to 7 personas will cover the majority of an audience and must go beyond mere demographic segments

- Helps the entire team 1) align on product development and marketing goals, 2) prioritize product roadmap, and (3) foster empathy

Resource

ABOUT

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis no istrud exerci tation ullamcorper. Duis autem vel eum iriure dolor in hendrerit in vulputate velit.

Ut wisi enim ad minim veniam, quis nostrud exerci tation ulla mcorper suscipit lobortis nisl ut aliquip ex ea commodo con sequat nibh euismod tincidunt ut.

♡ LIKES

Open source software
Cloud technology
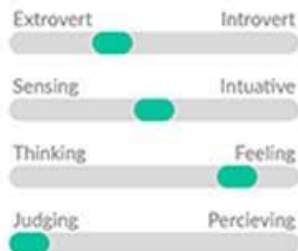Using her smartphone
Photography

☺ DISLIKES

Losing data
Poor communication
Slow internet connections
Unclear project briefs

GOALS

- Achieving greater productivity in software enineering

- Finding web-based software to automate her workload

- Oganazing her daily activities

- Gaining greater experience software engineering

- Saving time and money

Jessica Jones

27 years old

Software Engineer

San Francisco, California

"To be a good software engineer you have to be willing to break the rules to strive for something new."

PERSONALITY

Extrovert — Introvert

Sensing — Intuative

Thinking — Feeling

Judging — Percieving

TRAITS

Techsavy

Early adopter

Money conscious

Hard working

FAVORITE BRANDS

Google
Nikon
Sony

Discovery Interviews

Discovery interview roadmap

- Get to know them and their habits

- Identify their pain points

- Learn about experience with alternatives

- Introduce product/prototype/concept and ask for qual & quant feedback

🤫

- It's ideal to withhold sharing detailed background information on the company, problem, and solution prior to conducting the interview

- You will most likely need to give a broad description during your recruitment process, but try not to disclose what you believe their pain points are and in what specific ways you are seeking to solve their problems

- Sharing too much information at the beginning may influence the interviewee to identify something as a pain point only because you suggested it

- It has the potential to narrow their thinking and influence recollection

- It is recommended that you slowly start introducing this type of detailed information, as you get to the later parts of the interview, to get specific feedback on your solution

Set the stage

- Begin by introducing yourself

- Set the stage for the interview — "we are conducting early-stage discovery research. Your experience will be helpful in identifying specific needs and how we might be able to meet them. Anything you say will be helpful at this stage, no matter how small you think the detail may be. I appreciate your time and willingness to contribute to developing new technology."

- Communicate the duration of the interview (if possible, aim for 1 hour)

How faithfully should you follow the script?

- Think of this script as a guide. You do not need to ask all of these questions. It is likely you will not even have the time to do so.

- Creating a comprehensive list of questions will enable you to gather in-depth insights, but it's also important to prioritize which questions are a must-ask.

- Be open to the interview going in a different direction than you anticipated.

- Keep the order of the questions somewhat flexible, but refrain from sharing much about your solution until you reach that section at the end.

- Particularly in early exploratory interviews, you might learn new things that are fruitful to dig into with follow-up questions. Feel free to add questions on the spot as well as edit your script for future interviews.