Gaining Market and Customer Insights through In-Depth Interviews

Market Research MasterClass

Week Three

Pragmatic Alumni Community

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Course Syllabus

Week	Learning Objectives	What You Will Learn	Attachments	Assignment
1	Define the scope of the research project Create an issue tree	• How to frame up the project, in order to socialize it with your co-workers / supervisor / client, and gain consensus on what problem(s) you are trying to solve with the research • Definition of an issue tree, how to construct one, and what level of detail to include at this stage	• SCQH article • Issue tree example	Create SCQH and issue tree
2	Describe the target personas	• How to create persona profiles, and how to prioritize which persona(s) should be targeted for research	• Persona templates	Create persona document
3	**Create an interview guide** **Recruit customers for the research**	• **What constitutes a good interview guide for particular lengths of interviews (e.g., 30 minutes vs. 60 minutes), how to start and end an interview, and the importance of open-ended questions** • **Methods for identifying, soliciting and securing agreement from your interviewees**	• **Interview guide example**	**Create interview guide**
4	Conduct phone, video or in-person interviews	• How to prepare for a good phone interview, as well as processes and technologies to help them be successful	• Best practices when conducting an interview • Recording of past interviews	5-10 minute audio / video recording of a mock interview
5	Analyze interview transcripts Identify recurring themes, voices and key takeaways	• The value of recording and transcribing interviews, and a method to identify the right data contained in the interviews • How to "boil the ocean" and pull-out the most-important messages from the body of interviews	• Transcript examples • Affinity diagrams	Read three transcripts and develop an affinity diagram
6	Develop a report of the research	• Common report templates and storylines, and how to frame the results appropriately for the audience you're presenting to	• Final report examples	Slides or document summarizing market intelligence gleaned from research

Where are we in the Masterclass?

- Last Week → Defined the key *personas* we are targeting for our in-depth interviews
    - We have a clear vision of the persona's role and why we can gain insights from them

- This Week
    - → *What should we ask* those personas when we talk to them?
    - → *How do we recruit* people to agree to spend time talking to us?

Characteristics of Good Interview Questions

- Open-ended questions

  - How do you …? Why do you …? Tell me about …

- Conversational style

- Your job is to *listen* and probe for details/specifics … *get the person talking*

  - Put them in the place of authority; make them feel like the expert; observe/hear their emotions

- Don't ask a lot of yes/no questions

  - Bad question: Do you teach career readiness skills in your courses today?

  - Better questions: How do career readiness skills fit into your courses today?

Note: It IS a good idea to ask a yes/no question when you want to confirm something the customer said ☺

Tips for Good Interview Guides

- Define high-level, open-ended questions
  - Also, define drill-down / prompting questions
- Think of a good opening question to get the person talking and comfortable with being interviewed
- Refer back to your issue tree
- Words matter … how you ask a question matters
- The guide is a *guide*
  - You won't always ask the questions in the exact order you list them out
  - Use the guide to help keep you focused on what you want to cover
- Be conscious of how long you want interviews to take (30, 45 or 60 minutes??) and generate the guide accordingly

Length of Interview	Number of Main Questions
30 minutes	4-6
60 minutes	7-10

Interview Guide Example from Techie Co.

#	Question	Drill Down / Listen For
1	When and how did you first learn about Techie Co.?	• Who referred you, and why did you follow-up? • What compelled you after seeing an advertisement? • Who did you talk to first? In person or phone? • What impressed you about our product initially? • What if anything turned you off about our product initially?
2	Why did you decide to purchase from Techie Co.?	• What was the situation / catalyst you were dealing with? Problems you were facing? • Did you evaluate other alternatives? Which vendors?
3	What has your experience been with Techie Co.?	• Positives? • Negatives / areas for improvement? • What if any bumps in the road have there been? What did our product do to rectify those issues?
4	What do you feel is our company's value proposition?	• What peace of mind does our company's services give you? • What does your partnership with our company enable your organization to do better? • In the grand scheme of things, how critical is our service to your organization's success? • Tell me about the ROI.

Interview Guide Example #2

#	Question	Drill Down
1	Tell me the story about how you made the transition to distance and remote teaching	• What was the most challenging part? • Who did you rely on for help? • Who helped you?
2	How many of your peers struggled to adopt their course to be online?	• What do they find most challenging?
3	What resources did you find/use to help you move your course online?	• What made them useful? • How did you find them? • Were they free resources? • Were they provided from educator associations you're part of? • Were the resources tied to distance learning pedagogy? How to use technologies?
4	What do you know now that you wish you knew before you were rushed to go online?	

Benefits of Interview Guides

✓ Helps you think through the interview in advance

✓ Maps-out what your want to ask and how you want to ask certain questions

✓ Ensures you are scheduling the right amount of time for the interview

✓ Keeps you focused during the interview, so things don't get off track

Thinking about Recruitment

- One of the most-important activities of any in-depth interview effort is ***recruiting and securing candidates to participate*** in the interviews!

- This is rarely easy and low-effort ☹

- Most-likely, you must be thinking about recruitment at the beginning of the project, alongside of defining your issue tree and personas … there's no use in doing this if you can't get access to the people you want to talk to!

- Recruitment methods will be different depending on who you are going after (e.g., customers, potential customers, users of competitive products, etc.)

Thoughts on Recruiting Existing Customers

- First determine if you can do this yourself, or if you need others to help you (most likely the latter)
  - Do you have relationships with customers that you can recruit?
  - Do you have to leverage your colleagues' relationships with customers?

- When leveraging others, provide them the information they need to recruit for you
  - Research objectives
  - Key questions we're seeking answers to
  - Personas we desire to interview
  - Length of interview
  - What's in it for the interviewee?
  - Email template for someone to use when reaching out to the customer

Email Template for Recruitment

My organization is seeking input from secondary and post-secondary educators about their recent transitions to remote and distance teaching methods. We are seeking 45-60 minutes over a video conference (e.g., Zoom) to talk one-on-one with educators about the following topics:

1. Educators' challenges with distance teaching methods
2. Resources, tools, people and organizations educators have looked to for assistance in distance teaching
3. Our vision and concept for an open online library of educator resources, aimed at helping improve educators' abilities to teach remotely (educators will be shown sketches of the concept and be asked for their opinions)

Video conference calls can be scheduled Monday - Saturday, between 7:00 AM - 7:00 PM, during the weeks of September 14, 21 and 28. We will work within educators' busy schedules and be respectful of their time.

If you are interested in participating in a Zoom call, I will forward your contact information to the product manager, Chad Eckes, who will follow-up with you to schedule a time.

Let me know if you have any questions or if I can be of assistance with anything. Thanks again!

Thoughts on "What's in it for Them?"

- Ideally, you can offer the recruit something of value in exchange for their time
  - Insights on the market and what you're hearing from other customers
  - Opportunity to get connected to other customers you're interviewing
  - Written report with results from your research
  - An empathetic product manager who wants to learn from experts to make the product better ☺
- Sometimes, it might take monetary incentives, if the personas are hard-to-reach and very very busy

Thoughts on Recruiting Prospective Customers or Others

- Again, determine if you can do this yourself or need others to help you
  - Do you have relationships with people that you can recruit?
  - Do you have to network through your relationships to get to the target personas?
  - Do you think you can "cold-call" people to get them to participate?
  - How easy is it to find targets using your CRM, social media or purchased lists?
  - Do you have to leverage your colleagues' relationships?
  - What's in it for the colleague?
  - What's in it for the interviewee?
  - Should you hire a market research recruitment firm?

Tips for Recruiting

✓ Clearly state your objectives/reasons/purpose for conducting research

✓ Explain why you want to talk to THEM … why are they *special*

✓ Offer something of value in return for the person's time

✓ Be genuine, approachable, courteous and appreciative in your outreach and communications

Your Week Three Assignment

- Share or develop a whole or partial interview guide

- Post to the Discussion Group by Monday February 1 at 12:00 PM Pacific

- Review at least one other member's interview guide and provide comments/feedback

- Stretch-yourself Assignment → Develop a recruitment email

Thank you and have fun!