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Interviewing Customers for Your Customer Scenario Mapping Session

The Pre-Session Interview Enables Great Customer Scenario Choices

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Patricia Seybold Group / Methodology

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NETTING IT OUT

Customer-centric organizations involve customers directly in co-designing virtually every aspect of their business. They don't simply infer customer requirements from customer feedback, surveys, and focus groups. They go to great lengths to get customers' active participation in redesigning their internal systems and processes to be more customer adaptive.

Our Customer Scenario® Mapping methodology is a proven approach to gathering customer requirements and understanding customer context. In the preparation phase of a mapping project, you select target customer and partner segments and select companies and individuals to participate in the Customer Scenario® Mapping session.

And then you take the step that causes your anxiety—and that of the customers—to evaporate, to be replaced by curiosity and excitement. This step is the customer (or partner) interview. It is during this activity that you begin to realize how valuable these participants are and how much you are going to enjoy working with them. It becomes clear that with the experience and talent of these customers and partners, your session is going to be a fabulous success. So you want to organize this important step and get the most out of it. We offer this guide to the preparation, execution, and communication of the customer and partner interviews.

OVERVIEW OF THE INTERVIEW STEP

What

We advocate interviewing customers for a variety of purposes. We have provided our guidelines for group interviews,[1] which are conducted with internal stakeholders when you begin a project, when you need to identify the Customer Scenarios® your project addresses, and when you run into roadblocks.

The pre-session interview, which is the focus of this report, is conducted prior to the Customer Scenario® Mapping session. The subjects are the customers and partners who will be participating in your mapping session.

Yet another interview takes place during the Customer Scenario® Mapping, and that is the discussion of issues that begins each Customer Scenario Mapping session.

Why

In the Customer Scenario Mapping methodology, pre-session customer interviews provide the insight you need in order to design great Customer Scenarios, establish effective mapping teams, identify the right internal stakeholders to participate, and set the right expectations internally.

[1] See "Building Buy-In for Customer-Centric Initiatives," by Patricia B. Seybold, April 21, 2005, http://dx.doi.org/10.1571/me4-21-05cc.

When

The customer interviews begin once you've got commitment for the Customer Scenario Mapping session and have recruited some customers to participate. Ideally, you can complete the interviews several days ahead of your mapping event, so that you can validate your initial ideas about the scenarios to include and the makeup of the mapping teams. In Illustration 1, which depicts the eight activities in a Customer Scenario Mapping project, the customer interviews occur in Step 5: Gather customers' and/or partners' issues.

Who

The Customer Scenario Mapping project team should organize and conduct the interviews. There are two groups of people to interview: the customers and partners who are attending the mapping session. We believe that customers and partners should be approached in the same way, using the same questions, for the pre-session interviews.

Customer Scenario® Mapping Roadmap

Customer Scenario® Mapping (CSM) is a 15-year-old and mature methodology that enables customer-led process innovation. Your customers work together to redesign their own ideal processes for accomplishing their desired outcomes with assistance from your cross-functional teams of partners and employees. You co-invent your customers' ideal processes. You learn an incredible amount about their contexts, their conditions of satisfaction, their moments of truth, and how they measure success. Together, you explore ways to anticipate and to meet their needs today and in the future. The eight major activities in a Customer Scenario Mapping project are:

1. Identify scope of project
2. Plan the Scenario Mapping event(s)
3. Identify relevant target customer/partner segments
4. Recruit customers/partners for a mapping session
5. Gather customers' and/or partners' issues
6. Identify scenarios that encompass these issues
7. Recruit additional stakeholders
8. Set expectations

Illustration 1. There are eight major steps in a Customer Scenario Mapping project.

PURPOSE OF INTERVIEWS

Prepare Your Team

Before the mapping session begins, you'll need to figure out what Customer Scenarios to map and how the teams are composed. Your entire project team will want some insight into who is coming and what their issues are. The interview will help you accomplish the following:

- Identify the participants' roles
- Identify or validate customer and partner segments
- Understand the participants' key issues
- Validate that you internal hot issues match your customers' hot issues
- Understand the participants' business goals that relate to your company
- Establish a relationship with each of the participants

Prepare Your Guests

Your participating customers and partners are more than a little curious about what they've signed up for. They like the idea of helping co-design the activities that impact them. They are eager to help. But since they've probably never participated in a mapping session, they'll want to know more about it. Here are the things they are likely to ask or want to know:

- What am I expected to do?
- What do I need to know or prepare?

- Who else will be there?
- Who is handling logistics?
- Do I have the right date, time, and location?
- Will I be asked inappropriate questions about how I do business in front of my competitors?

Hidden in some of these questions is a bit of anxiety on the customer's part that you are going to ask him for expertise he doesn't have. It's possible he's a bit worried that he'll end up paying travel expenses he hasn't been authorized to spend. And he may be suddenly filled with dread that he will be stuck in a room with people obsessed with trivia—for example, a marketing executive faced with IT developers or the reverse.

The interview is your opportunity to reassure your customer on all these points of potential anxiety.

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PREPARATION

Know the Project Objectives

You've received the budget and approval to run a Customer Scenario Mapping session to gather feedback and/or requirements in critical areas. It's a good idea to document, in a few paragraphs, the project's objectives, the expectations you've set, the internal sponsors, and the internal issues that are the focus of the session. This paragraph should be included in all of your communications on the project, including interview scripts, interview summaries, invitations to internal stakeholders, and your summary report after the Customer Scenario Mapping event.

You should already have interviewed the sponsors of the event—those whose budgets or commitment are supporting you. Why? Interviewing your internal stakeholders ensures that you've got their issues captured and their expectations properly set. Capture your sponsors' goals, and send them back to all the sponsors so they have a common picture of the goals of the session.

Learn About the Customers

You have to know a little bit about a customer's business before you call. You might spend as little as 15 minutes and as much as several hours preparing for one of these interviews, depending on the time available to you and your comfort level in talking to strangers.

At a minimum, you should visit the customer or partner Web site and find out what her company does. See if the person you are interviewing is represented on the site with a biography or report. If this is a large corporation, you'll want to get an idea of the high-level organization and your customer's position—for example, the company is organized by product lines, and the person you are interviewing is in the adhesives division.

If you have friends in sales and support, ask them what they know about the person you are interviewing.

Identify Interviewer Teams

Ideally, two people on your team will conduct each interview. You'll each hear something slightly different, and you can compare notes and discuss what you heard after the interview. It is just about impossible to catch everything yourself.

It would be wonderful if you could tape the interview, but you probably can't. If this is the first time you've talked to someone, he or she is not going to be comfortable giving you permission to tape the conversation. Making the request could end your relationship before it begins. Take notes or bring a scribe.

Write Your Scripts

We recommend writing out your opening and your closing. You want to be crisp and confident, and it's a good idea if all the interviewers tell the same story. You don't have to read the script, but you definitely want to be able to glance at the salient points when you are speaking.

You'll also want to prepare some FAQs. We've already mentioned quite a few questions you can expect from the person you are interviewing. You should write down the answers to these questions and share them among the interview teams. In addition to making sure your answers are crisp, the scripts help you give an appropriate and informative answer. You don't want to reveal details out of context and then find yourself scrambling to provide the explanations—using up your valuable interview time.

Scheduling Interviews

You should plan on a 20 minute or 40 minute interview; 20 minutes for high-level executives, and 20 or 40 minutes for technical customers. Why 20 and 40? Executives (and their administrators) rarely begrudge 20 minutes. They will block out half an hour and start late, and you'll still get what you want. Technical staff will be willing to schedule an hour with you, but they are likely to use some of the time on a topic that isn't germane to you but that they just have to get off their chests. If you plan to collect what you want in 40 minutes, you can afford the time for the detour.

Should you contact your interviewee by phone or email? We've had the best luck phoning, leaving a message explaining our request, and following up with an email that includes the same request. Make sure the email has all of your contact information as well as your title. You may also want to send the interview questions; this helps the customer feel comfortable about the interview and may prompt him to include staff. Don't send instructions on how to do Customer Scenario Mapping; your customer or partner doesn't need to know how to map, and the information will be ignored or be the source of alarm. ("I don't know how to map; I'm not going!")

If your phone call is picked up by an administrator, this is great news. All you have to do is convince this person that your request is important, and she will make sure the meeting gets scheduled. She can tell you how your interviewee prefers to interact (phone or email) and what the interviewee looks like, so you can greet the person by name at your session.

What if you don't get all the interviews scheduled? It is ideal to have your interviews done the week before your session. You won't. There are interviewees whose schedules will conspire to make them elusive during your interview period. An administrator might help you find an alternate to interview—someone who works closely with the person you want to interview and can talk about current issues. You might get a chance as the Customer Scenario Mapping session starts to rush over and gather the person's top-of-mind issues or ask if he is interested in the scenario you've penciled him in for. It's life in the fast lane.

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THE INTERVIEW

Keep sight of your purpose; don't hang up without a strong idea of what this customer's issues, frustrations, and hopes are. If you understand her issues, you'll know what scenario will engage her.

We've prepared a sample script for you to work from, presented in Table A.

Interview Script
Opening
Thank you for taking the time to speak with us. We're very excited that you'll be participating in our customer co-design session. We understand we have 20 minutes. Is that correct? To prepare for the session, We'd like to briefly gather your top-of-mind issues and key objectives this year, in relation to my company.

Interview Script *(continued)*	
Interview Questions	
What are your goals for your relationship with us?	
What are your tasks and objectives (related to scope)?	
What are the hardest things (in this domain) for you to do, or what frustrates you the most?	
What issues/problems/frustrations do you have?	
What do you wish you could do that you can't, and how would you like to have that happen?	
When do you need to do these things? Under what circumstances?	
Closing	
Thank you for your time. This has been very helpful to us, and your participation will be invaluable. Do you have any other questions before we sign off? Thank you.	
FAQ	**Response**
What am I expected to do?	Part of this session will be a group discussion of issues in doing business with us. Most of the session, we'll be working in teams to design the ideal support for activities that are important to you. Our main purpose today is to find out what your issues are so we can put together the right teams.
What do I need to know or prepare?	You don't need to prepare anything. We won't be asking how you do business today. We will be asking about your top issues with our [focus area—e.g. support or licensing].
Who else will be there (and will they be tedious)?	The session will include a number of people in similar roles, as well as people whose roles are [list]. Your team will be comprised of people who have similar issues and a similar perspective. We've recruited [names and companies] for this session as well.
Will I be on a team with people from other companies?	Yes, you'll be teamed with people who have a role similar to yours.
Will I be asked inappropriate questions about how I do business in front of my competitors? Will I be asked questions I can't answer?	We'll be having a general discussion of issues and then designing an ideal approach to important tasks. It is up to you what facts and opinions you choose to volunteer.

Table A. This table shows a sample interview script.

Tips

You may feel a bit in awe of some of the customers and partners you are interviewing. I've never found the classic stage-fright cures—imagining your audience naked or remembering that he puts his pants on one leg at a time—to be helpful. But it does help to remember that being asked questions on the phone is a tremendously ordinary event for your customer, that he appreciates your care in preparing the event, and that your customer needs this meeting to feel comfortable and confident about the session. Thank your customer politely and get on to business. The highest courtesy is in being prepared and in being efficient.

In some cases, you may find that you are interviewing a group of people instead of a single customer or partner. This is fine, but you'll probably take more notes, more rapidly, as the participants fire off their thoughts. In your note taking, it is very important that you keep track of the issues and thoughts of the person who will be attending, so you can place that person on the right Customer Scenario team. If you can't tell who is speaking at any point, ask.

WRAP UP: COMMUNICATING INTERVIEW RESULTS

Our best advice for communicating the results of the interviews is to prepare your report outline early—before you start your interviews. That way, you're poised to capture the interview details that you'll need. You'll be glad you did—or you'll wish you had when you find yourself chasing down titles or addresses when you're hard on the deadline for delivering the summary.

Our best advice for communicating the results of the interviews is to prepare your report outline early—before you start your interviews.

Your summary should include at least the following:

- Interviewee name, title, and company
- Interviewee role with respect to your company
- Key issues
- Relevant business goals and projects
- Compliments—anything highly positive
- Key outcomes that this person cares about
- Suggested Customer Scenarios appropriate to this person

Who and When

Prepare your summary for the Customer Scenario Mapping project team and internal participants to read prior to the Customer Scenario Mapping session.

You should also plan to share the summary with a broader internal audience, either as part of the Customer Scenario Mapping session report or as a separate document. In some cases, you may want to delay distribution of the interview summaries to a wider audience until after your mapping event. If other staff members have not entirely bought in to this idea and/or don't realize that you are interviewing their customers, sending an interview summary may be like waving a red flag in front of a bull. You're going to need to focus your energies to organize your mapping session, rather than be distracted by explanations and justifications to people who are throwing up roadblocks.

Conclusion

Interviews get easy with practice. After you've done a few, you'll find that you really enjoy them—and that you're developing a reputation for interviewing excellence. On the way, if you have questions or would like to share some stories, we'd love to hear from you.