



The
Customer Clarity
Quick. Start. Guide.

15 critical questions to ask
your customers **NOW**.



Your customers know more about your business than you do.

When it comes to the product or service you are offering, your customers are the experts. After all, they are the buyers and users of your product. And since your business relies on their support, it's what they know and believe that really matters.

According to business management expert Peter Drucker, **"The customer rarely buys what the company thinks it's selling."**

The actual reasons or motivations that drive your customers to buy are often not what you expect. That's why it's critical to talk to your customers to clearly understand what they are trying to accomplish – and why. These insights are the key to retaining your existing customers and finding profitable new customers.

Unfortunately, this is where most companies drop the ball. A recent Forrester Consulting survey of over 600 companies showed that only 23% of CEOs believe their organization understands why its customers act the way they do.

The odds are that your competitors are also in the dark. So, if you're looking to get a leg up – read on.

So, what often gets in the way of having customer conversations? It could be that you're swamped with the daily challenges of running your business. Or maybe you've considered it but don't know how or where to begin.

We designed this guide to get you started on your way to conducting impactful customer interviews that will help you market smarter, make better decisions, and drive growth.

The following pages detail who to talk to, what questions to ask, and tips to make the process painless and effective.

Feel free to reach out to me with questions if you get stuck during the process. My email is therman@vedaintell.com or book time to chat in my calendar [here](#).

Wishing you all the best for continued success,



Tom Herman



Who to talk to, what to ask, and how to get it done.

What are we trying to discover?

There are three critical questions every company must be able to answer:

- 1. Why do your customers buy?** What are they trying to accomplish or solve by using your product/service? What motivates them to make a purchase?
- 2. Why do they choose you over your competitors?** What specifically does your company do better than your competitors?
- 3. Why do your customers leave you?** Was it something you did (or didn't do)? Did their needs change? Did they find something newer/better/cooler? Were they a poor fit from the get-go?

Your ability to accurately answer these questions (no guessing!) directly impacts your ability to effectively manage and grow your company. And the ONLY way to obtain these insights is by talking to your customers.

Remember that the answers your customers give today will likely be different from those in the near future – as your market and competitive environment are constantly changing.

So, it's essential to conduct this exercise at least annually and more frequently if there has been significant change within your company, market, or industry.

Who to talk to

If you are just starting, we suggest interviewing three primary categories of customers to provide a full spectrum of insights :

- Existing Customers**
- New Customers**
- Lost Customers**

We define **existing customers** as those who have been with your company for a year or more and have made many purchases. These are your proven, loyal customers that your organization depends on.

Next, we define **new customers** as those who have recently made their first purchase with your company. This first purchase must be fresh – ideally within the past month or two.

And finally, we define **lost customers** as those who haven't purchased from your company in over one year.

These category definitions are general guidelines. Feel free to adjust them based on your specific business and industry.

In the next section, we discuss how to find customers to interview and how to get the process moving.



Who to talk to, what to ask, and how to get it done.

Where to find them

Access your team's CRM, POS system, or email management software to select your interview prospects based on the criteria outlined on the previous page.

Choose a dozen customers from each category with an initial goal of completing three customers interviews in each category.

How to request and schedule interviews

Send each of your selected customers a personalized email asking them to share their thoughts over the phone (or over Zoom). Click [HERE](#) for email outreach scripts you can use.

Consider using a free resource like [Calendly](#) or [Koalendar](#) to schedule the calls and send reminders. Select a window of hours during the days you will be conducting the interviews and let the customer pick their time.

To accommodate different schedules, you may want to include some early morning, late day, and early evening time slots.

Incentives to get customers to participate are usually not necessary but can be helpful. You can offer a free product or a discount code for existing and new customers. For former (lost) customers, a \$25 Amazon gift card works well.

Interview tips and techniques

- When you're just starting, keep interviews short. Aim for three to five questions and about 10 minutes per call.
- Ask for permission to record the interviews or having a dedicated note-taker. You don't want to miss anything.
- Begin calls with an ice-breaker. A friendly "Tell me about yourself" works well.
- Remind the customer that there are no wrong answers and brutal honesty is ok.
- Let the customer speak. If they hesitate or struggle to explain something – let them work it out. Great insights often follow.
- Ask follow-up questions to get additional details. See the list below for ideas.
- Before ending the call, ask the customer if they have any questions for you. Follow up on any questions you can't answer on the spot.
- Immediately after the interview, spend 10 to 15 minutes capturing all you learned.

Follow up questions to go deeper

- "Interesting. Can you tell me more about that?"
- "What led to that decision? Can you walk me through your thought process?"
- "And why do you [NEED/WANT/CARE ABOUT] that?"
- "Why did you decide to do it that way?"
- "What else was going on that made that the right choice?"



Ask the right questions of the right customers.

EXISTING Customer Questions

1. How does our product/service make your life better?
2. In your opinion, what makes our product/service better than other options in the market?
3. What would you like us to keep doing, start doing, or stop doing to make your experience better? [Probe for each]
4. If you had one minute to convince a friend to switch to us, what would you say?
5. If our product/service was no longer available, which of our competitors would you turn to, and why?

NEW Customer Questions

1. Thinking back, do you remember how you found out about our product/service?
2. When you decided to buy our product/service, was there a specific problem you were trying to solve or job you were trying to get done?
3. What were you using before purchasing our product/service, and why did you decide to give us a try?
4. If you had to narrow it down, what was the #1 reason you decided to buy our product/service?
5. Now that you're using our product/service, how does it compare to your initial expectations?

LOST Customer Questions

1. Thinking back, what happened that pushed you to start looking for an alternative to our product/service?
2. What company's product/service are you now using?
3. What factored into your decision to switch to this company?
4. In your experience, how is this new company's product/service better than ours? Please be specific, you won't hurt our feelings.
5. What changes would our company have to make to earn back your business?



Congrats, you did it! Now, put what you've discovered to work.

Summarize your findings and apply the results

First, pat yourself on the back! You've done what so many businesses overlook – having meaningful conversations with their customers.

Now, for each interview, summarize the answers given for each question. Pay particular attention to words, phrases, and concepts raised by more than one customer.

Rank customer responses in order of occurrence to get an accurate picture of what your customers see, feel, and experience. Compare these findings to the beliefs that you and your team currently hold.

You can now apply the insights gathered through your customer interviews to fine-tune your marketing, customer service, and company strategies, including:

- Refine and strengthen your brand messaging.
- Identify purchasing triggers you can leverage to drive sales.
- Improve the customer experience for better loyalty & retention.
- Identify new market segments to target.
- Strengthen your product/service and its positioning.
- Identify and correct issues that lead to customer churn.
- Understand who your competitors are in your customer's eyes.
- Pinpoint competitor strengths and make necessary improvements.

And so much more.

Next Steps

1 Take the Customer Clarity Quiz

A free self-assessment to see how close you are to your ideal customers. Just 12 questions and takes 3 minutes. Visit www.vedaintell.com/customer-clarity-quiz or check out our website at www.vedaintell.com.

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