



Example Customer Interview Guide: Existing customers

Product / Service Usage:

- When did you start doing business with the organization?
- How did you hear about the organization?
- What other competitors were you evaluating when you chose to work with the organization? What made you select the organization over competing solutions?
- How has your usage of the org's products / services changed since you first started working together?
 - Increased, decreased, purchased additional products / services, expanded use to new locations, etc.
- How much variation is there in the total amount of the product or service you're purchasing over the course of the year? What are the key drivers?
 - E.g. seasonal trends, changes in end-customer preferences, bulk purchases based on promos

NPS / Key Purchasing Criteria:

- On a scale of 1 to 10, how likely would you be to recommend the organization's products or services to a friend or colleague? Why?
[Repeat question for other competing products or services the customer uses]
- What are your key purchasing criteria ("KPCs") for selecting a product / service from one company vs. another?
 - Price, quality, scale, speed, service, breadth of offerings, etc.
- How would you rate organization X relative to the competition on your KPCs?
- What do you like most about the organization? What appears to be the niche/ unique value proposition of the organization?
- What is the organization's biggest shortcoming? Is there anything holding you back from purchasing additional products/ services from the organization?

Outlook:

- How do you anticipate your usage of the organization's products / services changing over the next 2 yrs?
- How interested would you be in purchasing additional products / services from the organization if it offered new product lines or expanded to new geographies?

Example Customer Interview Guide: Prospective customers

Marketing:

- How do you generally find out about companies that provide property management services?
 - E.g., Specific industry magazines, Newsletters, Postcards/letters in the mail, Subscribe to any email newsletters, Attend industry events, Any specific websites, Colleague in the field (word of mouth)
- What type of information are you looking for? (Prompt: Pricing, Client list, Testimonials) What impresses you as you look through marketing materials?
- Do you prefer reaching out to companies when you need them or having companies approach you to discuss their available services?
- If you do meet with a company about their services, what information are you looking to hear about? Tell me about a meeting that really impressed you—what impressed you about this company and the meeting? How about any meetings that were not as impressive—what was lacking?

Product / Service Usage:

- How frequently do you purchase the product or service? Do you purchase from one provider or multiple? If multiple, how do you decide how much to purchase from each manufacturer?
- How much variation is there in the total amount of the product or service you're purchasing over the course of the year? What are the key drivers?
 - E.g. seasonal trends, changes in end-customer preferences, bulk purchases based on promos
- How are sales contracts structured? One-time, short term, long-term?
- How has your usage of the product or service changed over the past five years? How do you anticipate it will change over the next 5 years?

Sales Process:

- What is the sales process?
- How long is the sales cycle? Days? Weeks? Months?
- How do you evaluate vendors? Issue RFP, ongoing assessments from inbound calls, etc.
- How often do you evaluate switching from your existing vendor to a new one? What is the reason for doing so (e.g. dissatisfaction with existing vendor, end of contract, shift in internal needs, etc)
- Who are the key decision makers involved?

Key Purchasing Criteria:

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