Interviewing and Surveying

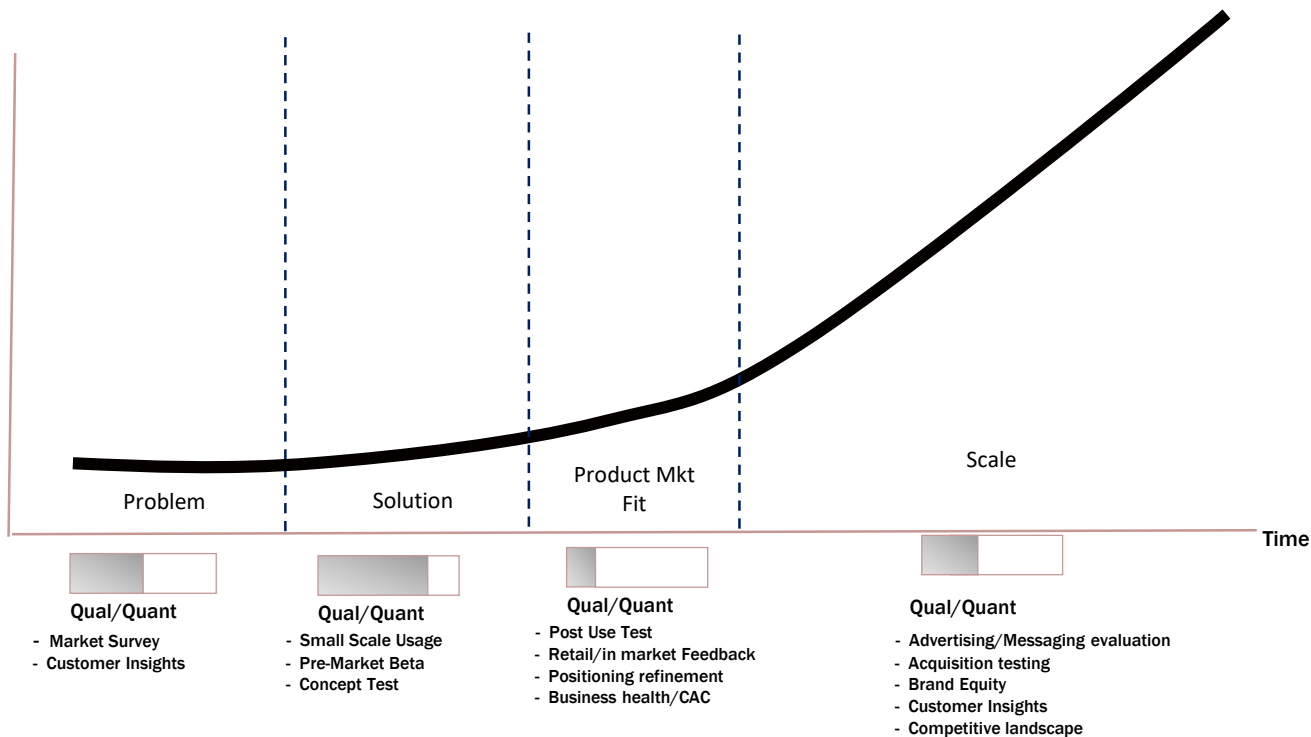Essential skills for Founders

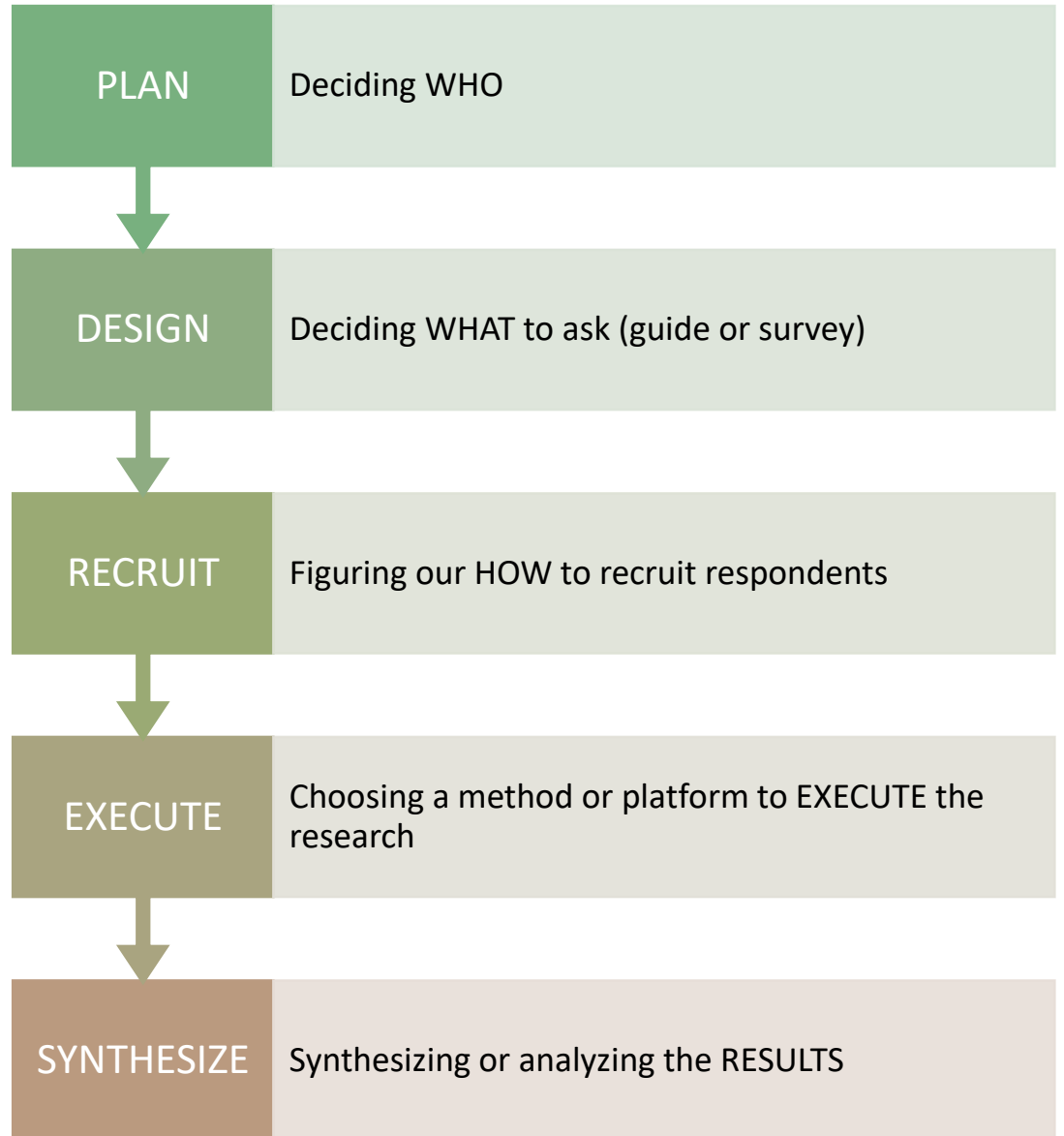# Interviewing and surveying customers are necessary in all stages

Scale

Product Mkt
Fit

Problem

Solution

Time

Qual/Quant

- Market Survey
- Customer Insights

Qual/Quant

- Small Scale Usage
- Pre-Market Beta
- Concept Test

Qual/Quant

- Post Use Test
- Retail/in market Feedback
- Positioning refinement
- Business health/CAC

Qual/Quant

- Advertising/Messaging evaluation
- Acquisition testing
- Brand Equity
- Customer Insights
- Competitive landscape

Interviewing and Surveying both involve 5 steps

PLAN — Deciding WHO

DESIGN — Deciding WHAT to ask (guide or survey)

RECRUIT — Figuring our HOW to recruit respondents

EXECUTE — Choosing a method or platform to EXECUTE the research
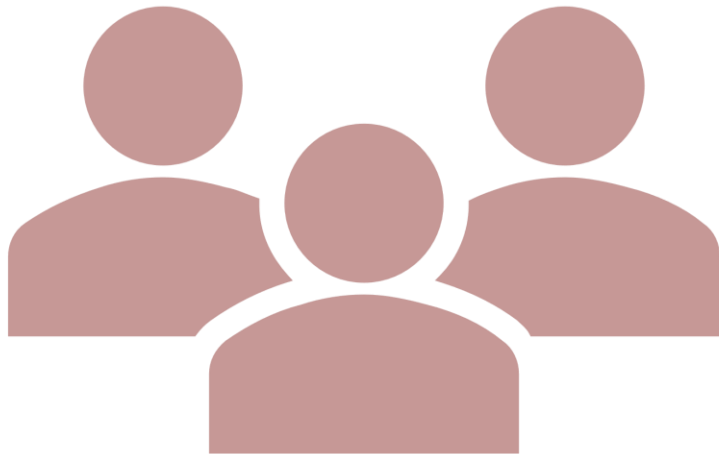
SYNTHESIZE — Synthesizing or analyzing the RESULTS

Interviewing

Three types of interviews

- 1:1
- Dyads or Triads
- Focus groups

There are four things to consider when deciding "WHO" you want to interview

- Relevancy

- Previous knowledge of your solution

- Cost/Feasibility

- Relationship to you

In most of your early stage work, you want "fresh," relevant respondents who are unknown to you

:

Two exceptions:

Friends & family:

- Debugging an MVP
- Checking comprehension of value prop

Current or Previous Users

- U/X U/I changes
- New features

Recruiting relevant, unknown to you respondents

Friends of friends

Consult an influencer

Online :hangouts" or interest groups(reddit, facebook, etc)

Place an online ad wait list, Craig's list

Online recruiting platforms (userinterview.com,)

Always a good idea to know who you are talking to – pre-survey

"screener survey"

?

5. What activities outside of the home and/or work, IF ANY, do you do regularly? For example, do you regularly engage in?
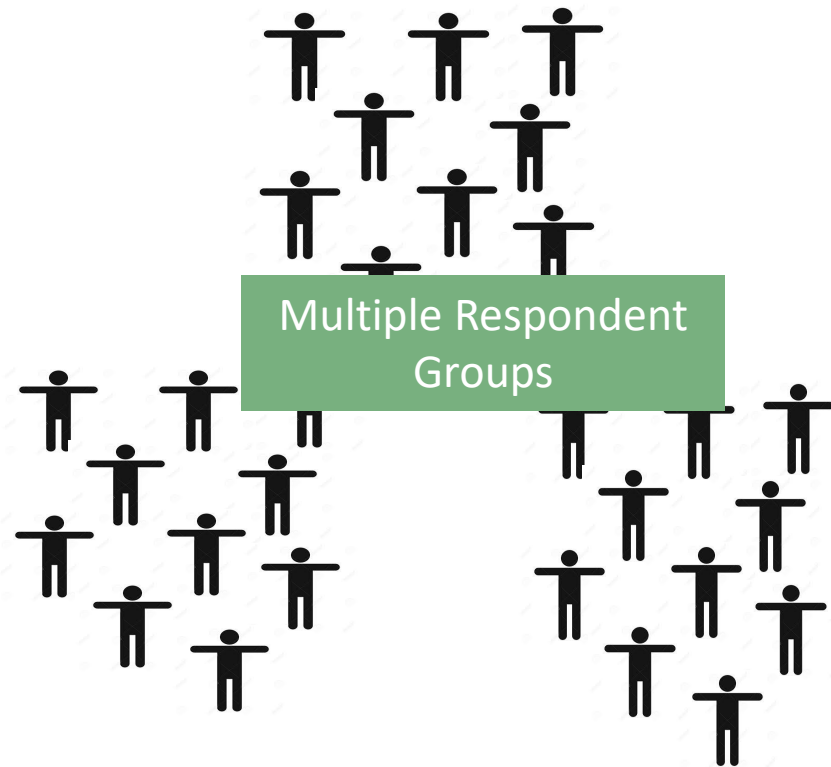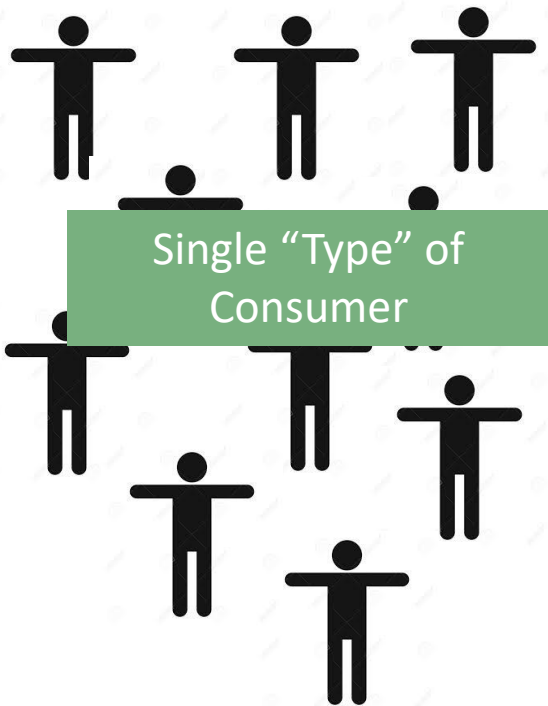- ❑ Sports or fitness activities
- ❑ School related activities (eg PTA, Volunteer at school, etc)
- ❑ Volunteering, charity, fundraising
- ❑ Hobby or interest-based activities or classes
- ❑ Other

6. On average, how often would you say you wear "sporty, smart, or dressy casual clothing?" By that I mean…
- ❑ Rarely or never
- ❑ A few times a month or less often
- ❑ One or two days a week
- ❑ 3-5 days a week
- ❑ Everyday or almost everyday

Patterns tend to emerge by 10 interviews for a given group

Single "Type" of Consumer

Multiple Respondent Groups

Customer Segments Example – Mass Hole Donuts

	Daily Commuter	Foodies	Celebrators	One-Timers
Description	Visit often, Spend little. Stop in on way to work. Monday – Friday.	Looking for fun culinary experience. Friday- Sunday. Typically, a couple or a family	Catering a celebration for either work or family.	BIG events. Weddings, Bar Mitzvahs, Conferences, Engagement parties
Percent of Customers	55%	30%	10%	5%
Percent of Revenue	25%	40%	15%	20%
What's most important to Them?	Consistency Fast and Fresh Service	Quality, Taste and Variety	Taste, Price, Ease of Ordering	Uniqueness and Quality
Most Effective Marketing Tactics	Coffe & Donut combo/ Loyalty Program	Changing Weekly Menu	On-line ordering, Delivery, Large preset order options	Custom Flavors, Delivery, venue coverage
How to Market to Them	Email, Loyalty Program	FB, Instagram, Brewery/Food festival Pop-ups	Email, FB, Instagram, Convert Daily Commuter and Foodies	FB, Instagram, Event Planners, Expos

The Mom Test

How to approach interviewing….

https://www.youtube.com/watch?v=Hla1jzhan78

Writing the interview guide: Introduction

Our main purpose is to learn from you about casual, everyday clothing. We'll be asking about your use of casual clothing and your loves and frustrations around finding, trying, buying, and wearing it.

We're mainly interested in what we're calling "sporty, smart, or dressy casual clothing" – the range of casual clothing you might wear to: run errands, go for a massage, or hang out; or to go out for a casual dinner at a nice restaurant with friends; or to attend a social event that suggests "casual attire." We're less interested in the active wear you might put on to go to the gym or play a sport, or the rugged or outdoorsy clothing you might put on to go for a hike.

Explanation of research process, including recording, etc.

Collect signed Respondent Release/Confidentiality Agreement

2 minutes

Writing the interview guide: WARM UP

To give **context/a sense of situations** you're dressing for, tell us a little about…

1.   What's life like – that is, who's in HH/ family, routines, etc.

2.   What is your typical weekday like? (What do you do, where do you go?)

3.   Typical weekend?

5 minutes

Next: problem, behaviors, motivations & attitudes

A. Has your use of – or relationship to – clothing (for you) **changed over time?**
How so? What was it all about 10 yrs ago? What is it about now?

B.   What about your <u>everyday casual clothing,</u> specifically?

1.   What do you **love**? (e.g., favorite brands, types of clothing?)

2. Biggest frustrations?

Unaided questions first. Likes followed by dislikes

15-25 minutes

LAST: Expose your concept

I'd like to introduce you to a few different concepts for new product and hear your reactions. Your candid thoughts and feelings will help the people working on these ideas to make decisions about how – or whether – to develop them further.

Have respondent read or watch.

Concepts rotated across interviews to reduce order bias.

A.   **How interested** are you – jot down an overall rating (-) 1 – 5 (+)

B.   **Thoughts/ feelings?**

1.   **What is this all about?** (Does it make sense? How would you describe this to a friend?)

2.   **Relevance**/ is this for you? Why do you say that? (If not, who is it for?)

3.   **Likes/dislikes**?

4.   **What bits (if any) are most important**/compelling/ interesting/ exciting to you?

5.   **Anything surprising?** (Positive surprises? Negative surprises?)

6.   **Any other words/ phrases/ elements that stand out**? Which? What does it convey?

7.   Anything **confusing or unclear?** (Questions/ concerns?)

15-20 minutes

Questions to Avoid When Validating Pain Points

1. Do you think it's a good idea?

2. Would you buy this product?

3. How much would you pay for it?

4. Would you pay $x for a product that did this?

Questions to Use When Validating Pain Points

1. Elaborate on the problems you are willing to solve, one by one. While doing that, put them in context so that the customer can relate to them

2. Ask them how to show you how they currently solve each problem

3. Let them talk about what they love and hate about it

4. Ask which other tools/approach they are using

5. Ask how did they find out about the current solution

6. Ask them how much they pay for it

7. Ask them what happens if they fail to solve each problem

How might we improve this question?

How well would this save time in your workday?

How might we improve this question?

How well would this save time in your workday?

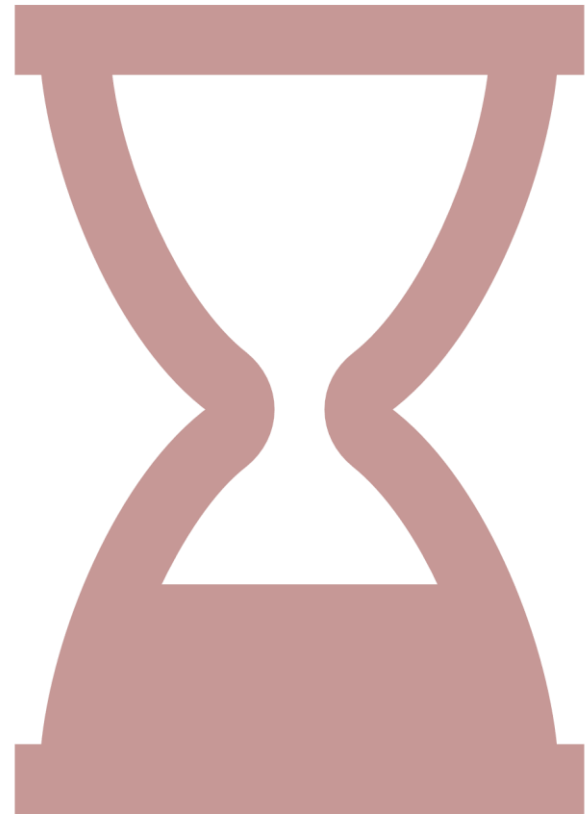*Improvement: How might this effect your efficiency at work, if at all?*

https://www.nngroup.com/articles/leading-questions/

Practice active listening

- "Uh-huhs" and "I sees"
- **"Whys" behind answers**
- Their logic and perspective?
- Keep track of time
- Seize on interesting articulate responses
- And gently probe inconsistencies

Use neutral probes when seeking clarification

So I don't assume....?

Can you elaborate more?

Excellent Resource: Begin on page 13

Surveying

Why are surveys important?

Surveys **can help gauge the representativeness of individual views and experiences**. When done well, surveys provide hard numbers on people's opinions and behaviors that can be used to make important decisions.

Source: Survey Monkey

Surveys capture your target's behavior

Q5
TYPE: MATRIX, SINGLE SELECTION

How often do you bet your friends and in what context?
bet: to risk something against someone else on the basis of a game, event, opinion, or outcome

#	ANSWERS	DAILY	A FEW TIMES PER WEEK	ABOUT WEEKLY	EVERY FEW WEEKS	LESS OFTEN THAN EVERY FEW WEEKS	NEVER	DON'T KNOW
A1	1 vs. 1	44 - (21.89%)	48 - (23.88%)	23 - (11.44%)	36 - (17.91%)	47 - (23.38%)	2 - (1.00%)	1 - (0.50%)
A2	Group/League/Team *excluding fantasy sports*	29 - (14.43%)	34 - (16.92%)	37 - (18.41%)	29 - (14.43%)	34 - (16.92%)	29 - (14.43%)	9 - (4.48%)

TOTAL UNIQUE RESPONDENTS 201

They inform product decisions

settlyt.

Q6
TYPE: MULTIPLE SELECTION

What do you bet about 1 vs.1?

#	ANSWERS	PERCENT (RESPONDENTS)	PERCENT (ANSWERS)	COUNT
A1	Sports (not participating)	39.30%	17.44%	79
A2	Trivia/Knowledge	38.31%	17.00%	77
A3	Physical Competitions	29.35%	13.02%	59
A4	Dares	34.83%	15.45%	70
A5	Video Games	47.76%	21.19%	96
A6	Fantasy Sports	35.82%	15.89%	72

TOTAL UNIQUE RESPONDENTS 201

You can validate the problem and test interest in the solution

Types of surveys typically used by entrepreneurs

PRE-INTERVIEW SCREENERS

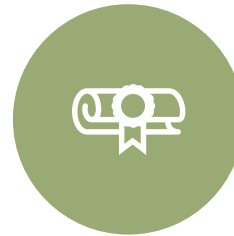5-7 ?s

PROBLEM IDENTIFICATION(GENERAL MARKET)

15-25 ?s

CONCEPT TEST (EXPOSE CONCEPT)

~15 ?s

POST USE OR POST BETA **FEEDBACK**

~3-25 ?s

With most* surveys, you need lots (350-500 ideal, 50 min) of "fresh", relevant respondents who are unknown to you

- Representative?

- Capable of filtering sub-groups?

- Screen out or screen in respondents?
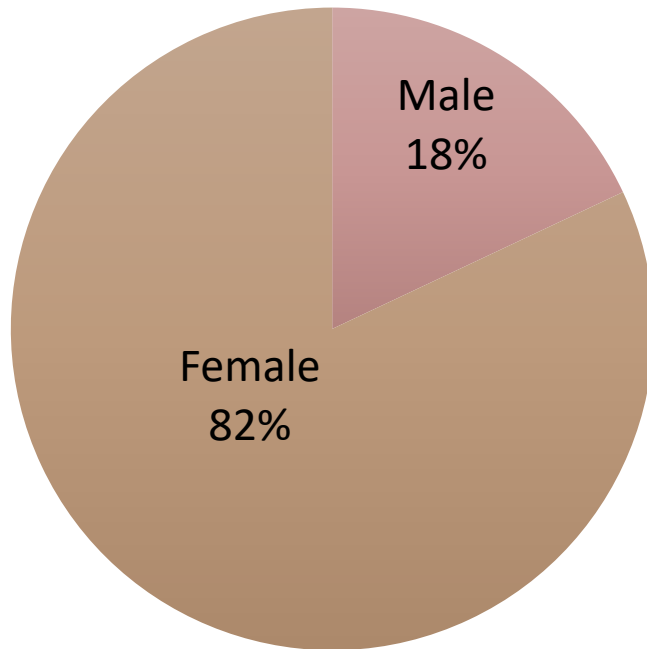
Not including screener surveys

Representativeness means matching the distribution of respondent "types" to the population; therefore projectable

Gender and age groupings

	My Problem ID Study	2012 Yoga Journal Study
18-24	19%	19%
25-34	29%	21%
35-44	16%	23%
45-54	12%	16%
55+	24%	21%

But constrains your recruiting options

Sample size: at least 50 per readable group; enables crosstabing for insights

Length of time been practicing yoga

	Total Sample	Any Hot Yoga*	Non-Heated Yoga Exclusively
	%	%	%
Less than 6 months	16	10	20
6 months to less than 1 year	16	14	17
1 year to less than 2 years	14	18	12
2 years to less than 3 years	14	16	14
3 years to less than 5 years	14	19	12
5 years to less than 10 years	13	15	12
10+ years	11	8	13
Don't know	0	1	0
	n=451	n=134	n=311

53% (1 year to less than 2 years, 2 years to less than 3 years, 3 years to less than 5 years — Any Hot Yoga)

38% (1 year to less than 2 years, 2 years to less than 3 years, 3 years to less than 5 years — Non-Heated Yoga Exclusively)

Recruiting large scale numbers of relevant respondents

Share survey across your network

Have Influencers share across their network

Post Online hangouts" or interest groups(reddit, facebook, etc)

Place an online ad

Survey Platforms with Panels (pollfish, Qualtrics, survey monkey)

Representative option

Consider use disqualifying questions at start of survey

Screening Questions
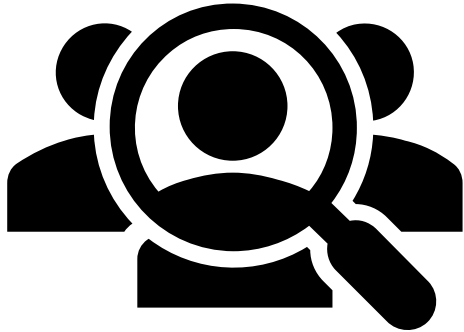
First, we have a few questions about you and how you use Courageous Parents Network, if at all:

1. In your work, how often do you see a child with a serious or life-limiting condition? (choose one)

- o   Very often; central to my practice
- o   Occasionally; 1-2 times per month
- o   Not very often; less than 6 times per year
- o   **Never [survey will end]**

How might we improve this question?

Do you do yoga?

- ○ Yes
- ○ No

- Missed opportunity – could ask how frequently someone practices yoga

- Unclear – ever do yoga or within the last year or two

- And what if you are not sure what doing yoga is?

How might we improve this question?

Would you say that you and your child have open discussions about careers and/or their interests? *

o Yes, my child often involves me in their interests

o Yes, when I initiate the conversation

o Sometimes, but there is a lack of understanding

o Rarely, instead I give my child space to explore

o Other:_____

Next: add 5 or 10 general behavior questions to use for "filtering"

1. On average, how many times <u>per week</u> do you practice yoga?

2. For how long have you been practicing yoga? <u>Note:</u> If you have ever taken some time off from practicing yoga and then restarted your practice, please indicate how long you have been practicing since taking time off.

3. And how would you rate your yoga ability?

4. In total, how many yoga mats do you currently own?

5. What brand of yoga mat do you **<u>use most often</u>** when you practice yoga?

6. Which phrase best describes how <u>satisfied</u> you are with the brand of yoga mat you use most often?

Then dig deeper into stuff you really want to know

1. Please think about your **IDEAL** yoga mat. For each statement below, please indicate how **important** this feature would be to you for your **IDEAL** yoga mat.

2. When you experience(d) your hands slipping on your yoga mat when in the downward dog pose, how big of a problem would you say this is (was)?

3. Please indicate the **one** thing that you **DISLIKE** most about your yoga mat, if anything, and the reason why?

Consider adding attitude statements to get to know your WHO a little better

Please indicate how strongly you **Agree** or **Disagree** with each of the following statements…	Strongly Agree 5	4	3	2	Strongly Disagree 1
Yoga is my preferred form of exercise					
I always strive to do the toughest postures					
I am looking to improve myself physically and mentally through yoga					
I strive to practice yoga philosophy in my life					
Yoga helps me to be a better person					
I like the way yoga makes me look					
I like the way yoga makes me feel					
Yoga is an integral part of my life					
I could not imagine my life without yoga					
I do yoga for the physical benefits					
I do yoga for the physical and mental benefits					
I do yoga for the physical, mental, and spiritual benefits					
I wish I could practice yoga more often than I do					
I am the first to try the newest yoga apparel					
I am willing to pay for high performance yoga gear					
Yoga mats are all about the same					
I wish my yoga mat could help me get more out of my practice					

Optional: end with your concept

And ask purchase or use intent

After watching this video, I would like to *

○ Enroll and see whether it would help my child

○ Share it with my child to determine if it's helpful

○ I don't think this would be helpful

In what capacity are you willing to engage with this platform? *

○ I would like a trial run with limited access

○ I would like to pay minimum amount for the premium account to get complete access

○ I would not like to engage

We would love to be associated with you. Please mention your email address if you would like to know about our launch

Filtering is when survey magic happens – try filtering on "definitely would buy"

Respondent Group (Survey Sample = 1,194)	All Respondents	30-64 year olds N = 597	65+ year olds N = 597
Rated Concept a "5" ie definitely would buy	24% 285	37% 219	11% 66

Note: We started by looking at the % that Definitely Would Buys (respondents who rated the concept a "5") as a percent of our WHO 30-64 year olds vs of the total sample. We also looked to 65+ demographic group. We can see that interest is significantly higher amongst younger vs total and younger vs older sufferers

*base respondent population = sufferers of osteoarthritic knee pain

Debugging a survey takes time and your full team

Add other, N/A & Not sure where relevant

Often **5-10 Drafts** required

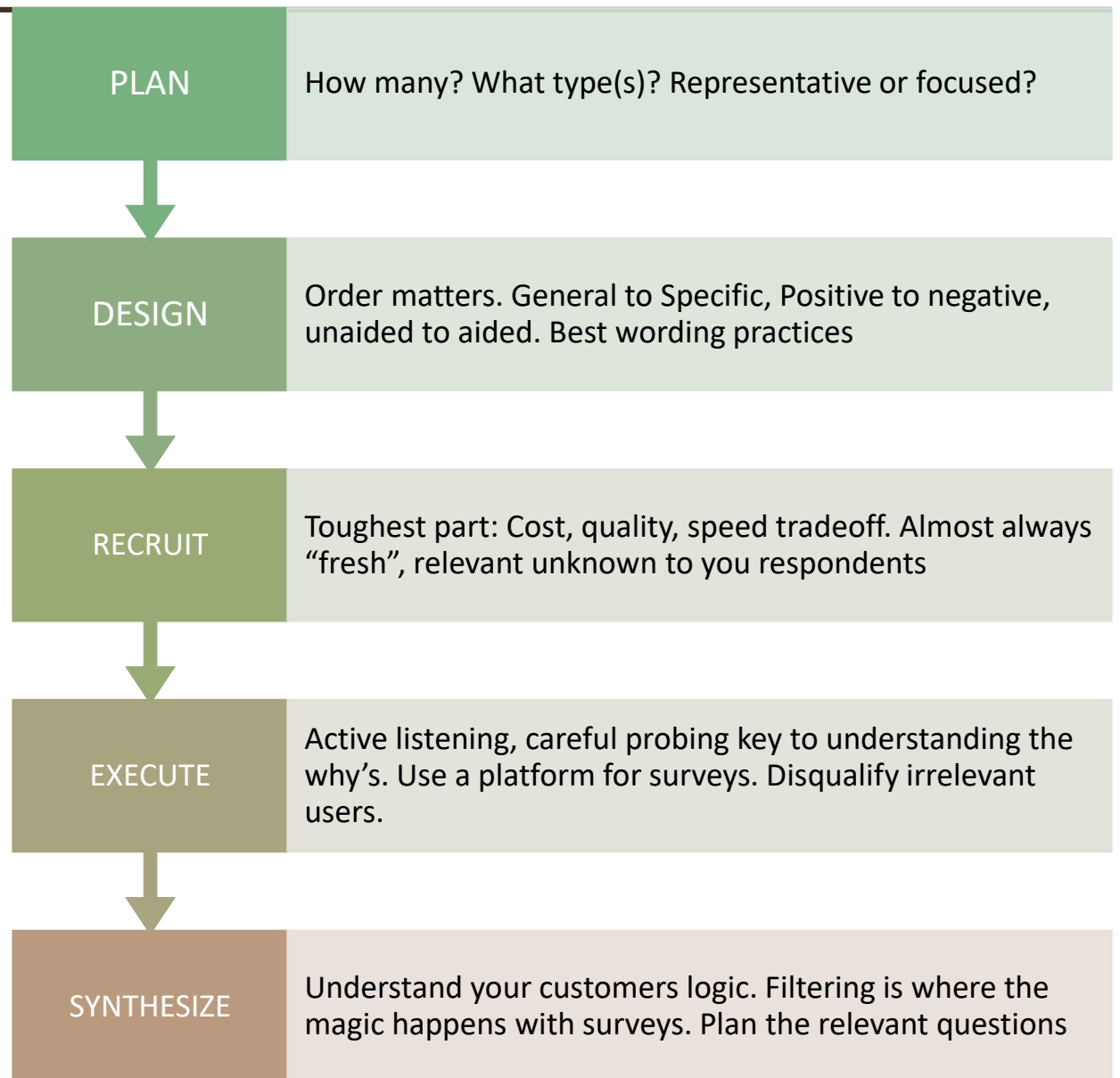**Multiple people review survey design**

Typeform, Airtable, or any of the survey platforms can "host" your survey

- Many have resources for best question design

- Offer features like skip logic

- Data can be downloaded as csv or spreadsheet format

- Some allow you to filter and do other analyses directly on the platform

- Preview the survey with multiple team members and friends/family

Key Learnings

PLAN	How many? What type(s)? Representative or focused?
DESIGN	Order matters. General to Specific, Positive to negative, unaided to aided. Best wording practices
RECRUIT	Toughest part: Cost, quality, speed tradeoff. Almost always "fresh", relevant unknown to you respondents
EXECUTE	Active listening, careful probing key to understanding the why's. Use a platform for surveys. Disqualify irrelevant users.
SYNTHESIZE	Understand your customers logic. Filtering is where the magic happens with surveys. Plan the relevant questions

Insights and data await you using customer interviews and large-scale surveys

- Recruiting respondents is the hardest part – quality, cost, speed tradeoff

- Start-ups likely can't spend to "eliminate" bias but you can be mindful of confirmation bias, volunteer response bias and best question wording practices

- It takes a village to properly interview and review question/survey design

- Research is a start-up long skill – start developing good practices now!