

# Client Interview Checklist

## ESTABLISH WHAT YOU ARE TRYING TO LEARN MORE INFORMATION ABOUT

Ex: Goal #1. I'd like to understand what my customers find most valuable about my business.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

## CREATE A LIST OF THE CONTACTS YOU'D LIKE TO INTERVIEW

- Always ask more people than you intend to speak with, as not everyone will be willing to be interviewed or have time

---

---

---

---

## ESTABLISH A TIME LENGTH FOR THE INTERVIEW

- For multiple details, 30-60 minutes is good
- For one topic, 15-20 minutes is all you need
- Hint: It's better to end early than to go on too long

## SCHEDULE PARTICIPANTS

- Adapt to their schedules, not yours
- Offer interview subjects at least three potential times
- Finalize your questions before the first meeting option

## CONDUCT THE INTERVIEW

---

---

---

---

---

---

---

---

## ANALYZE RESULTS

- Transcribe the interviews
- Look back at the notes you took and any statements you felt were important
- Do a second transcription of just the insights

---

---

---

---

---

**SCHEDULE PARTICIPANTS**

---

---

---

---

---

---

**SHARE HOW THIS WILL INFORM THE WORK  
YOU DO WITH YOUR CLIENT OR SHARE  
THIS REPORT**

