

Building a Requirements Foundation through Customer Interviews

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“Our customer doesn’t know what he wants,” complained Sandy. “I try to get him to talk about the product and tell me what he wants, but it’s like pulling teeth.”

Whether you are building a brand new product or working on evolving an existing product, understanding customer business needs is the foundation of a marketable product. But few of us are experts in interviewing techniques, and few customers talk about their tasks, needs, and context in neat, concise statements about product requirements.

Building the right product starts with asking the right questions. The *right* questions are those that help us get beneath the surface and understand the customer’s world, work, and concerns.

First Things First

Before you plunk yourself down in front of the customer and start asking questions, articulate your objective. What do you hope to accomplish by interviewing the customer? Do you want to explore broad options, understand a specific business processes, or learn all you can about how a customer uses a particular feature? Articulating a research objective sets the stage for a successful interview. A wandering, unfocused interaction will yield paltry results and frustrate the customer.

Once you’ve defined your objective, brainstorm a list of all the questions you might ask related to the topic. Then organize the questions into themes and arrange them to flow from general to specific and familiar to unfamiliar. The process of preparing questions helps to identify key topic areas to cover. Following a set list of questions isn’t the point: successful interviewers invest time in designing and testing questions—but then use them as a guide, not a script.

As you prepare for an interview, consider different types of questions. Each type will serve a purpose and elicit a different response.

Context-free Questions

Context-free questions are useful in the early stages of a project, when you are beginning to explore. Context-free questions help you decide which avenues to investigate and provide global information about the problem and potential solutions. Because these questions don't imply any particular context, they are useful for any design project.

Here are some product-related, context-free questions:

- What problem does this product solve?
- What problems might this product create?
- What environment is the product likely to encounter?[\[1\]](#)

Context-free questions generate a deeper understanding of the product and project.

Meta questions—questions about the questions—are a special sort of context-free question. Meta questions, such as “Do my questions seem relevant?” or “Is there anything else I should be asking?” are likely to surface areas where the customer assumes that you already know.

Open-ended Questions

Open-ended questions invite the customer to expand on the topic.

Use *What* questions to learn about events and considerations.

- What happens next?
- What factors are involved?

How questions ask about the way things happen.

- How do you use the product to_____?
- How do people decide which option to select?

Could questions ask the customer to imagine or express a wish.

- Could you conceive of an example when you'd use the product this way?

- Could you see a way to use the product to solve this problem?

Closed Questions

A closed question is one that naturally leads to a one-word answer, usually Yes or No. Questions that start with *Can*, *Do*, *Are*, or *Is* are usually closed questions.

Q: Do you have any problems with the wonder widget?

A: No.

Closed questions are useful for confirming specific information, but are deadly as an interview staple. You want to delve beneath the surface, and closed questions won't help you with that.

If you do happen to slip into a closed question, follow with a probing question to uncover more information:

Q: Can you recreate the problem?

A: No.

Q: What steps have you taken to try to recreate the problem?

Multiple-choice questions offer a limited set of options and help to establish relative priority:

- Which would you prefer, A, B, or C?
- If you had to choose one, which would you choose, X, Y, or Z?

Like closed questions, multiple-choice questions have their place, but shouldn't make up the bulk of an interview.

Past, Present, Future

Ask questions about past use to understand problems and weaknesses in the product or feature. Use present-time questions to learn about how the customer currently uses the product or how he currently performs his job. And ask questions about the future to learn about trends and anticipate future needs.

Past: When has the product failed to perform as you expected?

Present: How are you using the product now?

Future: How do you see your workflow changing in the next several years?

Tell Me More

Don't stop at the first answer. Follow an opened-ended question with a probe to gain further insight. A good interviewer will elicit a second, third, and even a fourth response. When you want to learn more, use questions like these:

- What else?
- Can you show me?
- Can you give me an example?
- How did that happen?
- What happens next?
- What's behind that?
- Are there any other reasons?

Be sure to probe for more information when you hear emotion or judgment:

“I hate the way the floo feature operates!”

“The product does a poor job.”

Dig deeper to identify unmet needs or weaknesses in the product.

Vague statements like “The product must be easy to use” call for probing to learn what “easy to use” really means to the customer.

Questions That Aren't Really Questions

Some questions don't elicit the customer's opinion, but confirm the interviewer's opinion instead. *Biased* questions suggest a “right” answer: “My investigation shows that automating the floo process will provide the biggest savings. What advantages do you see in that?” *Leading* questions make one response more likely than another. Biased and leading questions tend to feel manipulative, and a customer will tune out if he feels the interviewer is

leading or putting words in his mouth. Compound questions make it difficult for the customer to respond at all, as in this example:

“Do you think it’s okay to have a question with two topics—unless there are more than that, or if the topic is complex—and is it better to stick to short questions, except in the case where a longer question is better, or is it a judgment call, except in a special case?”

Ask one question at a time, and give the customer time to answer. Rushing in with another question can give the impression that you don’t really care to hear what the customer has to say.

Ask Why Without Asking “Why?”

Curious children ask “Why?” endlessly. They want to know the answers to everything, even things that are unknowable.

We want to know why customers do the things they do so we can understand the tasks they perform and the business needs behind the tasks. But an endless stream of “Why?” questions can wear on anyone’s patience. Worse, “Why?” can sound blaming, or feel like the interviewer is demanding a cogent explanation for something that’s unknowable.

Avoid putting the customer on the defensive by using *How* or *What* questions to dig beneath the surface.

- How did this come to be?
- What was the thinking behind that decision?

Or simply ask “Can you help me understand this?”

Putting It All Together

Before you rush off to try out your interviewing skills, practice. Start with a colleague, and then try your interview with an internal customer proxy or subject-matter expert.

Most people find that maintaining rapport and tracking the interview takes all their attention. To help with this, consider working with a partner who can take verbatim notes during the interview. At the end of every interview, perform a short interview retrospective to identify what worked well and what you might want to do differently in future interviews.

Most customers appreciate the opportunity to talk about their work and participate in shaping the products they use. Prepare for your customer interview carefully and hone your interview skills through practice. Invest in learning your customers' wants and needs so you can deliver the right products.

[1] Gause and Weinberg, *Exploring Requirements: Quality Before Design* p. 61-65.