First customer conversation

Print both pages. Ask about a real event, then choose what to test next.

Participant code: _____ Date: _____

Customer group / role: _____

01 Before you start

Situation to explore (describe the task; don't name your solution):

Assumption to test (from your worksheet):

What would make you rethink that assumption?

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02 Open neutrally

"I'm trying to understand how you handle [situation]. I'd like to hear about your experience, not pitch an idea. There are no right answers. Is it OK if I take notes? You can skip any question or stop at any time."

Use a participant code. Avoid sensitive details; ask separately before recording.

03 Follow the story

1. **Tell me about the last time you dealt with [situation].**
   When was that? What was happening?
2. **Walk me through what you did, from start to finish.**
   What happened next? Who else was involved?
3. **What, if anything, was difficult about that?**
   What happened as a result?
4. **What did you try to deal with it?**
   What worked? What didn't?
5. **What did that take in time or money, if anything?**
   How did you work that out? An estimate is fine.
6. **Before that occasion, when else did this happen?**
   If there's no other occasion, note that too.
7. **How did you decide whether to do anything about it?**
   Who made the decision? What took priority instead?

Keep the facts. Test the guess.

Participant code: _____ Date: _____

04 Capture evidence before interpretation

Reported or observed

Exact words, actions, dates, costs. Label what they told you versus what you saw.

Interpretation / still unknown

Your possible explanation. What else could explain it? What needs checking?

No recent event? Note it. Don’t push for a story or turn a compliment into evidence.

05 Close without a pitch

“What have I missed? May I contact you for one follow-up?” Note permission and the agreed next step; keep contact details separately.

06 Choose the next test after the conversation

☐ Investigate further ☐ Change the assumption ☐ Pause this idea

What evidence led to that choice? What remains uncertain?

Next action + who / by when (e.g. another interview or a small real offer):

What observable result would make you continue, change or stop?

Conversations do not prove demand. Test whether people act on a real offer; compliments and promises to buy are not purchases.