Customer Discovery Interview Planner & Notes

A-STATE | INNOVATION & ENTREPRENEURSHIP | STUDENT WORKSHEET

Use one copy per interview. This worksheet helps you prepare, listen, document evidence, and decide what to investigate next. It is not a survey or a product pitch.

PART A | Before the interview

Business idea / working concept:

_____

Who do you think experiences the problem? (Be specific about their role or situation.)

_____

Problem hypothesis: We believe [group] experiences [problem] when [situation], causing [consequence].

_____

_____

_____

What is the most important assumption this interview could challenge?

_____

_____

_____

Why is this participant relevant to the problem?

_____

_____

_____

Interview date: _____ Interview code (e.g., I-01): _____

Participant role / relevant context: _____

User, buyer, decision-maker, or other: _____

Record relevant background information about your interviewee, but avoid collecting unnecessary personal details. Keep contact information separate from interview notes when practical.

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PART B | Interview opening

Suggested opening: “Thank you for speaking with me. I am learning how people experience [topic]. I am not selling anything. I would like to hear about your actual experiences. You can skip any question or stop at any time.”

If taking an audio recording, ask permission separately before recording. Otherwise, take notes.

PART C | Conversation prompts

Use these as flexible prompts, not a script. Start broad, ask for a recent example, and let the participant do most of the talking. Do not introduce your solution during problem discovery.

1. Context

Ask: Tell me about how you currently handle [activity or situation].

Notes / concrete examples:

2. Recent experience

Ask: Walk me through the last time this was difficult. What happened?

Notes / concrete examples:

3. Consequences

Ask: What made that situation challenging? What did it cost in time, money, or effort?

Notes / concrete examples:

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4. Current approaches

Ask: How did you handle it? What else have you tried?

Notes / concrete examples:

5. Gaps

Ask: What has been frustrating or missing about those approaches?

Notes / concrete examples:

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Interview Notes & Evidence

Interview code: _____ Date: _____

Follow-up prompts

“What happened next?” • “How often?” • “Can you give another example?” • “Why that approach?” • “What did you do instead?”

Specific recent incident or story:

Existing solutions / workarounds, including doing nothing:

Evidence of effort, spending, frequency, or consequences:

Participant language worth remembering (short exact phrases):

Unexpected insights or contradictions:

Separate what the participant actually said or did from your interpretation. Do not treat polite interest in an idea as evidence of demand.

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After the Interview

Complete this section immediately while the conversation is fresh.

PART D | Interpret the evidence

What is the clearest problem described?

What evidence shows how significant or frequent it is?

What existing solutions or alternatives did the participant use?

Which initial assumption was supported, challenged, or left unanswered?

PART E | Decide what to do next

Evidence of need (check one, then explain):

☐ Strong: recurring problem and meaningful effort to address it

☐ Emerging: problem recognized, but limited action taken

☐ Limited: little evidence this is a meaningful problem for this participant

What observations justify that classification? (Do not rely on enthusiasm alone.)

What will you change about your hypothesis, customer segment, or next interview questions?

Who should you interview next, and why?

Quick quality check

☐ I asked about past experiences, not hypothetical willingness to buy.

☐ I listened more than I talked and did not pitch my solution.

☐ I captured concrete examples, alternatives, and unexpected findings.

☐ I distinguished participant evidence from my own conclusions.

Next: Compare this interview with others in your Customer Discovery Findings Tracker. Patterns across interviews can guide your next tests, but a few interviews do not establish market demand.

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