PRACTICAL RESOURCE / STARTUPCOACH

Customer Interview Decision Worksheet

Save a copy and fill it in. Use one interview record per participant. Keep identifying details separate from your analysis and obtain consent before recording.

1. The Decision

Decision we need to make:

Customer group and qualifying recent behavior:

What we currently believe:

Evidence that would change our mind:

Recruiting source and possible selection bias:

2. Conversation Plan

Opening: Explain what you are researching and how notes will be used.

Context: What part of the process does this person handle?

Episode: Walk through the most recent attempt, in sequence.

Consequence: What happened when a step became difficult?

Alternative: What did they try, and what worked well enough?

Buying: Who decides, who pays, and what approvals are needed?

Close: Ask what you missed and agree any next step.

3. INTERVIEW RECORD (repeat for each participant)

Participant code / date / recruiting source:

Qualifying behavior and recent episode:

Trigger and frequency:

Steps and current workaround:

Observed consequence:

Alternative attempted and result:

Buyer and approval process:

Exact quotation, if accurately recorded:

Observation or demonstrated behavior:

Our interpretation:

Alternative explanation:

Unknown or contradictory evidence:

Agreed next action:

4. Batch Review

Patterns within the same customer group:

Meaningful differences or contradictions:

What we can reasonably conclude:

What we cannot conclude:

Decision: narrow the audience / test an offer / investigate further / stop

Next test, owner, and review date:

Working example: Seeing a manager copy updates into a group chat establishes a workaround. It does not establish that a new scheduling platform is the right solution. Test the underlying communication problem.

Do not count compliments as purchases or AI-generated personas as interview participants.

Guide: https://startupcoach.cc/journal/customer-interviews-that-change-decisions

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