

Customer Case Study Questions

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How to use this tool: each of the questions below may be used in a 30-45 minute customer interview. There will not be enough time to ask all of the questions, so we recommend you ask at least a few in each section.

Context	1	Describe the industry sector you are in (e.g. healthcare, financial services, technology, media & entertainment, manufacturing, etc.)
	2	What are some of the big industry forces now (e.g. compliance regulations, global competition, skilled workforce, automation)
	3	Who are some of your top competitors?
	4	What is the current situation with the company's overall health - financial, market position, growth vs mature phase, recent big changes in ownership/mgmt, etc.
	5	What are the three most important things your company does for its customers?
	6	How large is your customer (e.g. annual revenue, number of employees) and your organization?
Persona	1	Describe your professional experience (e.g. cyber security professional, business executive, technology executive, etc.)
	2	Describe your role; what are some of your important responsibilities?
	3	What experience is needed to be successful in your role?
	4	Whose advice do you tend to listen to the most?
	5	What publications/forums/social media circles do you rely on the most?
	6	What events do you attend each year?
Challenge	1	What is the business situation you were facing that led you to consider a technology purchase?
	2	What specific task or function were you finding to be an increasingly bigger concern or issue for you personally?
	3	What specific trigger(s) initiated the search for options and eventually a technology purchase cycle? What was the straw that broke the camel's back, so to speak?
	4	Why not continue with the status quo? What would be the consequences if you could not solve these problems?
	5	What is the business impact of these challenges?
	6	How did you justify a technology purchase as necessary to address this challenge?



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Solution	1	What were the requirements of the solution you intended to buy?
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	2	What factors did you consider in making the decision?
	3	Which stakeholders were involved in the purchase decision?
	4	How did you first learn about our solution?
	5	What did you like and dislike about the technology vendor solutions you considered?
	6	Why did you choose us? What finally led you to select us?
	7	What products/services did you buy from us? Which have you fully deployed?
Result	1	What did you like best about our product/service?
	2	How did you measure success?
	3	What are some of the business impacts of deploying our solution?
	4	What would your executives say about how this solution benefited you and your company?
	5	How has this technology choice affected your personal day to day job? Your career?
	6	What advice would you give an industry colleague about this whole experience?