



The Ultimate Guide to Discovery Interviews

How to get the answers you need from stakeholders
to develop a winning strategy for your brand

Your Strategy Starts Here

MAKING STAKEHOLDER INTERVIEWS A KEY PART OF YOUR STRATEGY DISCOVERY PHASE

Has your organization decided to invest the time and resources into developing a brand strategy, marketing strategy or content strategy? If so, congrats — it's difficult to secure agreement to get even this far.

This probably means you've either hired an agency or consultant, or you've carved out time for your team to go through a methodical process to develop guidelines and a roadmap for your brand or marketing efforts. And you need to design a deliberate discovery process to start.

DO I NEED TO DO STAKEHOLDER DISCOVERY INTERVIEWS?

If you're undertaking any kind of initiative that involves long-range strategy and affects how you're communicating or going to market, stakeholder interviews will help guide your way. Consider conducting interviews when you're embarking on:



Business strategy



Product strategy / product roadmaps



Visual brand strategy



Positioning and messaging



Website strategy and design



Marketing strategy and planning



Content strategy



Customer experience strategy

Don't skimp on the discovery phase

Discovery is the phase that agencies and consultants insist upon but many internal teams tend to skip over or rush. It takes precious time: not just the brand or marketing team's time, but the time of many people in the company charged with giving input and gathering documents and information.

Taking the time to thoroughly understand your business — where you are today and where you want to go — as well as your customers and market landscape is the only way to develop a winning strategy.

Too many times, teams make decisions based on what they think they know. Discovery work shakes the trees for the good stuff, the information and thinking that aren't so apparent in the day-to-day of a business. The reality is that:

- **Different leaders have different perspectives** about where their part of the business is going. Sometimes there are discrepancies among executives' vision for the business that most don't even know exist.
- **Valuable knowledge about the business** and industry is locked inside people's heads.
- **Your market changes all the time.** What was true a year or two ago probably isn't true now.
- **It's difficult to truly understand your customers** and what they want. And companies often forget to stop and think about things from the customers' point of view.

Spending the time to examine the landscape and dig under the surface of the business helps marketers or brand teams build a strategy based on reality — a strategy that will actually work and support the business.

The role of stakeholder interviews

Discovery interviews can be one of the most effective ways to take the pulse of a business and get insight into where the organization and market are headed. They let you hear directly from the people moving the business forward and hearing customers' concerns and issues every day firsthand.

More importantly, they let you challenge the conventional way of explaining or thinking about the business. You get to probe more deeply and ask questions about why and how that most employees ordinarily lack the confidence to ask.

When done right, stakeholder interviews let you break through preconceptions and complex business jargon to achieve clarity. And only with clarity can everyone agree and get aligned on where to go next.



Stakeholder Interview Goals

- 1. Business goals:** Paint a cohesive picture of the current business situation and goals for the coming two to five years.
- 2. Market and competitors:** Get perspective on the current market landscape and competitive situation from the business leaders.
- 3. Customers:** Understand customers' challenges and how they engage with the business and make decisions.
- 4. Brand and marketing:** Gain insight into current brand awareness and perceptions, marketing goals and plans, and new marketing opportunities and challenges.
- 5. Culture and team:** Learn about how the company is organized, the leadership structure, company values and how teams interact with each other and customers.

The devil's in the details

THE LOGISTICS OF SETTING UP YOUR STAKEHOLDER INTERVIEWS FOR SUCCESS

Scheduling the interviews requires a strategy in itself. Coordinating so many meetings with the busiest people in your organization takes a lot of time and coordination — and, to be successful, some forethought about how to prep your stakeholders to get them to even agree to participate.

GAIN BUY-IN FIRST

It's all too easy for senior leaders in your organization to ignore requests for their time if they're not motivated to participate. So, you need to start by explaining what you're up to.

Sending an email to everyone you want to interview is the best way to start. If you have an executive champion for your strategy initiative, the email should come from that person. If not, sending it from the highest-level person heading up the project — such as your VP of marketing — is your next-best option. The request should come from someone who has influence and authority — someone whose email the leader will actually open.

Sample invitation email



Our company is embarking on a strategy that will help us to more effectively build a strong brand and communicate with our customers. The project will allow us to consistently and clearly articulate the company's value proposition and build a more cohesive customer experience.

I'd like you to participate in a 60-minute interview with our strategy consultants to help us start this initiative. We're interested in your perspective on the company's goals, strategies and challenges, how we market ourselves and engage with our customers, where we are different, and the state of the market in which we operate. We'll be conducting interviews with about a dozen senior leaders and other stakeholders.

From this interview process, as well as an in-depth audit of our own and our competitors' communications, we will develop a clearer understanding of our key segments and how we serve them with differentiating offerings. This knowledge will be used to create and implement a brand platform and messaging framework to effectively communicate our brand promise and business value.

We will work to schedule time on your calendar. We can provide sample questions beforehand if you'd like to prepare for the discussion. Thank you for your time and contribution to this very important project!

Fun with Scheduling: 10 Tips for Success



- 1. Designate a scheduler.**

Recruit a person who has some access to and control over calendars (such as an executive administrative assistant) to schedule interviews.
- 2. Create a master calendar.**

Create a master spreadsheet of all stakeholders, along with their contact information, interview times and status. Put the spreadsheet in a central location (we like Google Docs) and keep it up to date as details change.
- 3. Coordinate schedules ahead of time.**

Reserve blocks of time with the interviewers, to make sure there aren't conflicts that require constant rescheduling — especially if they're outside consultants who don't share your calendar system.
- 4. Be efficient with in-person interviews.**

If you're planning to conduct in-person interviews, try to block a day to do as many as possible for efficiency. Be sure to build in a little buffer time between interviews (at least 30 minutes) to account for discussions that go over time, and to let interviewers get their thoughts together.
- 5. Ask for an hour (and plan for a little more).**

The more senior the stakeholders, the less time they'll want to spend. Promise to limit the interview to one hour — but be prepared for the interview to go over. (Some people start talking and can't stop!)
- 6. Look ahead to stakeholders' out-of-office plans.**

Account for any upcoming business trips or vacations proactively. Try to prioritize interviews with any stakeholders who plan to be out of the office in the coming weeks.
- 7. Clarify contact details.**

Be sure to clarify how the interviewer will contact the stakeholder: calling directly, using a conference line or showing up in person.
- 8. Head off rescheduling follies.**

If the stakeholder (or assistant) reschedules more than three times, it may be necessary to ask your executive champion or senior-level marketing leader to step in and stress the importance of the interview. Having that person request the interview on your behalf might become necessary.
- 9. Send context and questions in the invitation.**

Include the original request for the interview in the body of the calendar invitation. Especially for senior leaders who don't manage their own calendars, this will provide some context as they — and their assistants — plan their days. Also, you might want to attach a list of questions or discussion topics to the invitation to help stakeholders prepare.
- 10. Limit the size of group interviews.**

If you're planning to group stakeholders together or hold small group discussions instead of one-on-one interviews, try to limit the number of people involved. More than two interviewees can start to limit the effectiveness of the interview: it's hard for everyone to get time to talk, and people are less candid when colleagues are present.

Who should you interview?

Usually you're limited to a certain number of stakeholder interviews because of cost and time restrictions. So when choosing who to include in your interview lineup, you have to choose wisely. Consider including at least a couple of representatives from each of the following categories:

- **Senior leaders of the organization**, including the C-suite and division presidents or senior vice presidents, who can speak to the company's vision and business strategy.
- **Marketing representatives** at different levels: the chief marketing officer or VP of marketing and marketing directors/managers who can talk about brand positioning and marketing strategies.
- **Members of the sales team**, including sales leadership and outside and inside sales representatives, who can discuss the sales process and how customers make decisions.
- **Product managers** who talk about product strategies, customer or user scenarios and personas, and product history and development roadmaps.
- **Customer support managers** or account managers who can share common customer questions, issues and concerns.
- **HR leaders** who can talk about objectives and messages for employee engagement and recruiting (because employees and prospective employees are typically important audiences).

Also include anyone not on the above list who's intimately involved today in managing the program or project for which you're developing the strategy.

Choose your interviewer carefully

Your interviewer needs to be somebody knowledgeable about business strategy, conversant in your industry and comfortable talking to people at all levels of an organization.

CONDUCTING THE INTERVIEWS INTERNALLY

It's best for the interviewer to be someone who isn't sitting at the same table when business decisions are made. The interviewer may too easily take things at face value or neglect to challenge stakeholders on what they say, out of professional courtesy or because she's drunk too much corporate Kool-Aid.

USING AN AGENCY OR CONSULTANT

If you hire an agency, the strategist or consultant will typically conduct the interview. The interviewer needs to be someone stakeholders trust and respect: someone sharp, business-savvy, confident enough to ask the right questions, emotionally intelligent and skilled at taking cues about political landmines.

C-level executives are especially quick to detect and dismiss anyone who can't choreograph this delicate dance and isn't an intellectual equal. Insist that your agency provide a senior-level strategist to conduct discovery interviews.



Should you include customers in your interviews?

Any time you're able to talk to customers, it adds a whole new dimension to strategy discovery work. Talking to customers can help you validate the perspectives of your internal people, who can sometimes be too close to the business to see it realistically.

But talking to customers may not always be feasible, especially if it adds substantial money to the budget. If you do decide to include customers in your interviews, consider these guidelines:

- Remember that you'll probably not interview enough people to get statistically significant results. Treat anything you hear from customers as purely anecdotal, provided for context, rather than qualitative market research.
- Customers typically don't spend a lot of time thinking about your business, brand or website. So you may not be able to get as detailed and in-depth with your questions. You'll typically only require about 30 minutes for customer interviews.
- Try to include at least one customer from each of your targeted segments.
- If at all possible, try to include a couple of prospective customers (your sales reps might be able to help you secure them). They can provide a true outsider's perspective that current customers might not be able to deliver.
- Suppliers, partners and others outside your organization might also be valuable participants in the interviews.

Ask to receive

HOW TO PREPARE FOR AND CHOREOGRAPH A PRODUCTIVE DISCOVERY INTERVIEW

You finally get your stakeholder to commit to an interview, and it's show time! Whether you're planning to conduct the interview in person or by phone or video chat, there are a few logistical things to get out of the way before the time arrives for your discussion.

PLANNING FOR THE INTERVIEW

For in-person interviews.

Make sure everything's settled about the physical space where you'll be meeting. If it's a conference room, have your designated scheduler reserve the space; if it's the stakeholder's office, make sure your scheduler coordinates with the stakeholder's assistant to ensure meetings end on time that day.

For calls or video chats.

Communicate clearly how you're connecting with the stakeholder — should she call in to a conference line or will you dial her directly? If using Skype or another platform, ensure you and your stakeholder are familiar with the technology before designating it as the communication tool. Otherwise, you'll spend half your session troubleshooting, and your interviewee will be distracted.

NOTE-TAKING

Different interviewers have different techniques for recording notes from the interview. Your options are basically:

- **Record the audio** of the conversation, and either transcribe it yourself or have it professionally transcribed later.
- **Take notes on a laptop** while listening to your stakeholder.
- **Bring a transcriber** to take notes while you listen and conduct the interview.

Only choose to take notes yourself if this is something you're experienced doing. For some people, it's too hard to type, listen and think at the same time. Recording the interview requires a lot of work afterward, but can be valuable if you think you might miss something or feel it would provide more context. A human transcriber can be helpful, but might also be distracting to the stakeholder.

However you choose to do it, make sure the outcome is a set of detailed notes from your conversation you can go back and easily understand, and provide to the project leads if they want backup or proof of a point later on.

DURING THE INTERVIEW

Make your introduction short.

If you've set up the interview correctly, you shouldn't have to spend a lot of time recapping why you're there. Provide a short recap of what you're doing, and dive in. You might ask interview subjects if there are any questions before you start, and that can take care of any lingering confusion or doubt.

You might also consider telling the stakeholder, before you start, that interviews will be kept anonymous. This allows stakeholders to speak candidly without worry of repercussions. Later, you might summarize conversations or even call out quotes, but you don't need to identify who said what to the project lead.

Start by understanding the stakeholder's point of view.

Even if you've studied the subject's CV or bio, start the interview by asking the stakeholder to provide background and an overview of roles and responsibilities at the company. With some interviewees, this might result in a jargony jumble of business speak: "I am the person chiefly responsible for designing disruptive business solutions that leverage the bibbity-bobbity-boo ..." — you know the drill. If this happens, ask the question from another perspective: "If you're at a barbeque with people who don't work in your industry, and someone asks you what you do, what do you say?"

This introduction helps the interviewee loosen up a little, and become more comfortable with the conversation instead of feeling stiff and formal. It also frames the conversation so you know what areas are most relevant, and through what lens your interviewee sees the world. For example, if you learn the stakeholder was a doctor before starting work as the COO of a healthcare technology corporation, you know he or she sees things with a clinical perspective, and you might want to adapt your line of questioning accordingly.

Ask open-ended questions first, with the intention of following up on details later.

“Where do you see your business heading in the next five years?” Sometimes a question like this can be so broad it elicits a little bit of a laugh, because there’s no easy way to answer it. But it gets the interviewee thinking out loud, and the laugh may break some tension. It’s in the margins of that monologue where the insights start to pop out.

Sometimes the richest nuggets are off-the-cuff things people say that may seem obvious or ordinary to the stakeholder — but may reveal critical information about the direction in which a business is moving.

For example: a project manager might say something in an offhanded way about how the client company recently went to a new procurement system and now evaluates RFPs and vendors differently than before. As the PM continues to talk about the project, you might make a note and plan to return to that, because it’s critical to understand how that relationship and decision-making process will change, and whether that’s an overall trend that’s taking shape in the industry.

Remember your stakeholder probably doesn’t speak Marketing.

To you, it might seem perfectly logical to ask a stakeholder who the target persona for the product is or what KPIs she uses to measure success. But depending on whom you’re talking to, you might get a blank stare back at your question. Executives with MBAs and marketing professionals may speak your secret code, but be careful to put your questions into plainer language for other interviewees, especially end-users or customers.

Stay nimble and ready to go where the conversation takes you.

Start with a discussion guide that has about 25 big-picture questions (see the callout in this section for samples). But you may throw this discussion guide out the window quickly, because based on who the stakeholder is, you may want to spend your short time digging into certain areas and not others. Listen carefully, take great notes and be prepared to follow your interviewees down the winding paths as they talk.

Prepare to head off stakeholders who want to get too tactical, too fast.

Sometimes stakeholders come into the conversation with an agenda. They want to tell you everything that’s wrong with your website, or why they hate the logo. And they’ve prepared a detailed list that they want to walk through with you. This is great — thank them for taking the time to prepare such a thorough document, and invite them to email it to you. Then gently steer them back to the big-picture questions you came to ask. The discovery interviews aren’t about solving the problems, they’re about understanding the business. If there’s time at the end, definitely get their perspectives on what’s not working today, and how the brand, the marketing strategy or the website can better support their goals. But don’t let them hijack the conversations by telling you what to fix. You’re still in discovery, and you’re not properly informed yet to propose an answer.

Always finish by asking where you didn’t go.

Five minutes before the end of the conversation, ask: “Is there anything we haven’t covered, or that I haven’t asked about, that you think might be important for me to know?” This takes care of any areas the interviewees thought you were going to discuss but didn’t, but it also lets them get closure on any of their thoughts or feelings. Because this is often an unexpected question, it often prompts stakeholders to be candid, to say whatever’s on their minds — and sometimes the best stuff can come out of those few minutes of unprepared conversation.

“Stay nimble and ready to go where the conversation takes you.”



Sample Discovery Interview Questions

GET THE BIG PICTURE FROM YOUR STAKEHOLDERS ON THE FOLLOWING SUBJECTS



BRANDING AND MARKETING

- Do you have a sense of the brand awareness for the company in the marketplace?
- How much are you focused on building brand awareness in your marketing vs. product marketing and direct sales support?
- What do you want consumers to leave thinking about the company and its products, and what do you want them to leave feeling?
- Can you describe your marketing program over the past year, and what you're planning for the upcoming year? What is the general breakdown in spending for your marketing budget? How do you see web and electronic marketing fitting in to your overall marketing picture?
- What are your major marketing opportunities in the next 1-5 years?
- What are your biggest marketing challenges?
- What are your major marketing objectives, strategies and metrics for the next couple years?



CUSTOMERS

- Who is the primary user of your products?
- What choices do your consumers face — what decisions do they need to make before finally deciding to purchase your product? How are they influenced?
- What objections might a consumer have about your product? How do you address these objections? Do you use your current marketing tactics to help overcome objections?
- Can you describe the purchase process for these target users?
- Do your existing customers feel brand loyalty to your company and your products?
- How would you describe your value proposition vs. your top competitor(s)?
- What are your major customer objectives, strategies and metrics for the next couple years?



SALES

- Who is responsible for selling your product to the end consumer? How do you prepare that salesperson to communicate the right messages to consumers about your product?
- What does the sales process look like?
- What kinds of information do customers typically need to make their decisions about buying? What factors do they compare and weigh when deciding between yours and a competitor's product?
- What are your 3 biggest sales challenges? Will these stay consistent in the short-term future or do you see new challenges emerging in the next 2-5 years?
- What are your major sales objectives, strategies and metrics for the next couple years?



PRODUCTS

- Which of your product brands is the strongest or best selling? Why?
- Why do customers choose your products over a competitor's?
- Where are your products weaker or more limited than your competitors'?
- How are your products branded and named? Is there a systematic way that you name brands and differentiate models (a brand architecture)? Do you spend a great deal of marketing effort to promoting specific brands?
- Are the target audiences different for each of your product brands?



MARKET/COMPETITORS

- How do you see your market changing in the next 3-5 years?
- Which competitors most often win over your products in the market?
- What are those competitors' strengths that cause them to win?

Tallying up the talks

HOW TO COMPILE, LEARN FROM AND USE WHAT YOU'VE COLLECTED IN YOUR DISCOVERY INTERVIEWS

The outcome of your weeks of interviews will be pages upon pages of notes or transcripts. Now comes the fun part: figuring out what exactly you've learned from all this.

If you're like most interviewers, a lot of your conversations start to blur together. While a few a-ha moments might stand out in your mind, it's going to take some digging back through all your notes to actually figure out what you've learned.

THE REAL DISCOVERY STARTS HERE

Start by re-reading all your notes. Open a new document (we recommend using a word-processing document first so you can let the files be messy for awhile). As you read through your notes or transcripts, pull out passages that stand out to you — high-level concepts you want to remember or poignant quotes that embody an idea or sentiment that seems important. As you do this:

- **Find and group common themes.** Study the interviews for common ideas, goals or challenges that span several conversations. Begin to group together notes about these themes, highlighting quotes or well-articulated summaries of them you can use later to support the findings.
- **Watch for contradicting ideas too.** Sometimes in the course of interviews, it becomes apparent that stakeholders disagree on a strategy. These conflicts may negatively affect the future outcome of your project — so identifying them and addressing them now, as part of the discovery phase, is ideal.
- **Piece together the story of the business and the brand.** All the information you collect can start to come together into a narrative about what's happening today with the business, the brand, the market and the customer — and where the business needs to go. Begin to write this narrative from the information you've collected. Writing it out will help you start seeing where there might be gaps or confusion in what you've collected so far.
- **Build support for your recommendations.** Highlight some of the strongest quotes from the stakeholder interviews. These quotes will be powerful for supporting your recommendations for a strategy later on.

A STRATEGY IS BORN

While a discovery phase often includes many different activities — a competitive and/or market analysis, an audit of the company's current communications, and a review of market research or analyst reports are common ones — discovery interviews frame where the organization has been, where it wants to go, and what it faces as it moves ahead. They help you understand the end customers' perspective too: what problems they're trying to solve, how they think about and look for ways to solve them, and what they need to go through to make decisions.

With this grounding, devising the strategy framework becomes a clearer exercise. As you pull together the strategy, it will be solidly in line with business goals, customer needs and market realities. And it will serve the organization well into the future as the platform for building the brand experience.

“Piece together the story of the business and the brand.”



Are You Starting a Strategy Initiative?

Suite Seven builds successful brand, marketing and content strategies for organizations. We'll help you conduct an in-depth discovery phase that includes discovery interviews, communication and content audits, and competitive analyses. Then, we develop in-depth strategies that provide a blueprint for how you engage with your customers.

If you're looking for help with your strategy initiative — or just need a partner to tackle the discovery phase — **connect with us!**

We'll try not to ask too many questions (at least at first).



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