

Customer case study questions

Securing case studies can be hard work so when you do get that golden opportunity, you want to make the most of it. Here are 80 questions to pick and choose from to make sure no stone goes unturned.

Building a rapport

If you want to get rich and honest answers, you need to start by laying a foundation of trust and creating a relationship that ensures the interviewee feels comfortable. These aren't prescriptive, but here are some generic conversation-opening lines.

- How's your day going?
 - How long have you been at [insert company name] for?
 - Have you always worked in the same sort of industry?
 - Are you looking forward to [insert event/holiday/etc.]?
 - Is there anything you'd like to know from me before we get going?
 - Just to check, are you happy for me to record this conversation?
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Understanding the interviewee and their company/circumstance

Great case studies set the scene and are packed with context. To achieve both, you need to really relate to the customer in question.

- What is your role within the company? And can you talk me through some of your responsibilities?
 - How long has your business been around for?
 - Can you give us some history into your company and what consumer problems it's trying to solve?
 - What are your company's values?
 - Who else in your company uses our product?
 - What's your target market?
 - How does your business help its customers?
 - What are your business' goals?
 - What are some of your industry's unique issues?
 - What solution(s) were you using that our solution replaced?
 - What are your primary KPIs and how do they tie in with the business' goals?
 - Can you describe a typical day or week in your role?
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Digging into their life before you

To truly show how much your product's benefited others, you need to paint a picture of what their life looked like before you came along.

- Before using our product, how were you managing the [insert solution] process?
 - How much time, resource and money do you think that was costing you?
 - Can you ever imagine going back to that kind of set-up now? If not, why not?
 - What was the tipping point to buying our product? Was there anything in particular that made you realize you just had to have it?
 - What were the top three pain points you faced before us?
 - Have you tried other products similar to ours previously? If so, how would you rate them?
 - What was the reason you didn't buy our product sooner?
 - How did your previous solution impact the business? And specifically, which departments/roles were affected?
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Delving into their decision-making process

Most customers will go through a similar sort of journey when looking into your product. So, help prospects relate to now happy customers by walking others through their steps.

- How did you first find out about our product?
 - When looking into our product, what were the top one to three things that caught your eye?
 - What was the moment you thought “yes, I need to buy this product”?
 - If not you, who was in charge of final sign-off for the purchase? Were they hard to convince?
 - What made you choose us over others?
 - What was your main buying criteria?
 - Would you say our solution aligned with your company’s goals?
 - Were there any deal breakers for the acceptance or rejection of purchasing our product?
 - From start to finish, how did you find our purchase process?
 - Who else was involved in the purchase process?
 - Outside our or similar products, what other solutions did you explore? And what was the reason you didn’t opt for them?
 - After first hearing about our product, how long did it take you to purchase it? Were there any specific stages you went through to get from A to B?
 - What was the onboarding process like for your team?
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Looking at the here and now

Now you've got the background info, you can start asking questions that uncover how much you've transformed the way they work.

- How often do you use our product?
 - How long have you been using our product for?
 - Which departments and roles use our product?
 - What are the main use cases you rely on our product for?
 - How has our product helped improve your process?
 - How long did it take to get settled in with our product?
 - Do you have any statistics you can share in terms of how our product has helped support your KPIs?
 - Has our product lived up to everything you expected?
 - Is there anything you use our product for that you hadn't initially planned on?
 - How do other people within your organization describe our product?
 - How has our product supported your business' core objectives?
 - Are there any metrics you can share in terms of how our product's helped you be more efficient?
 - What have you been able to do with the time, money and/or resources you've saved?
 - What would your advice be to anyone who's looking into buying our product right now?
 - How do you measure what success looks like with our product?
 - Would you recommend our product to others?
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- Which part(s) of our product do you find most valuable?
 - If you had to sum up the benefits of our product in one sentence, what would it be?
 - How long did it take you to see the benefits of our product for yourself?
 - What have you been most impressed with?
 - What are your future plans for our product?
 - Has our product unlocked any new opportunities for you? If so, what?
 - How would you rate our customer service?
 - How would you rate the user experience of our product?
 - How would you describe your communication with us?
 - What are your thoughts on our product's self-service opportunities?
 - How would you describe the look and feel of our product?
 - How does our technology compare to that of other products you subscribe to?
 - Did you have to migrate from another solution to ours? If so, how did you do that? And how did you find the process?
 - Which, if any, other apps do you integrate our product with? And how have you found that?
 - Has our product achieved the objectives set out for it?

Sharing the bigger picture

*Every business' end goal is to bring more revenue in and ensure their customers are happy, so uncover how **your** happy customer is ensuring **their** happy customers.*

- How has implementing our product benefitted your customers?
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- Have any of your customers commented on the change?
 - Were any of your customers complaining about your previous set-up before you took out our product? If so, what were they saying?

Making the most of the opportunity

*These questions won't be used in your case study, of course, but while you've got your customer on the phone take the chance to pick their brains on how you could be **even better**.*

- What areas of our product, if any, do you struggle with most?
- Is there anything you think our product should have or do that it doesn't already?
- How do you think our sales process could be better?
- Was enough content available to you when you were researching our product? Is there anything you wished you could have had but didn't?
- Which area(s) of our product do you see the least value in?
- How could our solution be easier to use?

Opening the flood gate

Last but not least, give your case study a platform to get anything off their chest that your previous questions might not have elicited.

- Is there anything else you think we or others should know?
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