


ALL YOU NEED TOOLKIT

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# UX TACTICS FOR CONVERSATIONS WITH CUSTOMERS

Includes Do's, Dont's and tips to help you  
gain valuable and actionable feedbacks  
from your customers



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# WHY CONSIDER USER EXPERIENCE WHEN TALKING TO CUSTOMERS?

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It might be the startups' Entrepreneurs, company owner, PMs, or developers that meet the company's customers in different contexts.

What I occasionally found is that in those meetings, different tactics are being used about the product, which later provides insights that impact decision making.

Some of the tactics I noticed, were:

- \* Presenting a new feature in the product to existing customers and explaining how it works (Functionality wise).
- \* Asking customers If they like/ dislike something done in the system (confirmation).
- \* Asking the customers what they want, or what would help them solve a problem.

Although there are differences between User Interviews and Customer Meeting, at its core, every conversation with a customer is an opportunity to shed light on the **challenges they are facing today**.

It's a unique moment for us to discover the ways we can help them overcome those challenges with our service/product.

Here are some guidelines to direct you on how to implement UX tactics in your next customer's meeting.

Enjoy!

Sivana

# DON'TS

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## 01

Don't ask a question, and provide a possible reply.

"How often do you use our product: Daily, weekly, monthly?"

## 02

Avoid asking leading questions.

"How much do you like this feature? Does this feature make you happy?"

## 03

Don't ask yes/no questions.

When we ask a yes/no question, we will usually get as a reply "yes/ no".

## 04

Don't ask questions in the future tense.

"Would you be interested", "Would it be helpful if", "Would you use this".

## 05

Don't explain your solution to the client. (Functionality)

## 06

Don't be afraid of the truth.

Showing our hard labor to customers can be intimidating, and it's difficult to hear negative feedback.

But hard as it may be, it's essential for us.

## 07

Don't take feedback personally

Even though we spend hours and hours on perfecting the solution we show customers, It's vital to maintain neutrality.

# DO'S

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01

Ease them into the conversation.

02

Ask habits and behavior questions.

03

Ask Open-ended questions.

04

Follow-up questions.

05

Look for specific use-cases and context.

06

Let them see the feature for a few seconds before diving in.

07

Take detailed notes.

08

**Shut up. Listen.**

# QUESTION EXAMPLES

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## Basic Question - Get the conversation flowing

- 🗣️ What is their company doing?
- 🗣️ How is the Team/department structured?
- 🗣️ What is their role and what are their responsibilities in the company/team?
- 🗣️ Who are they reporting to?
- 🗣️ Are there any other team members using the system in their department?

## Specific case questions - Get more contextual information

- 🗣️ What is a 'success' to them (What are the metrics measure to define success?)
- 🗣️ What are some of the apps and websites you use on a regular basis?
- 🗣️ What do they like about those services/apps?
- 🗣️ What don't they like?
- 🗣️ What other platforms/ services are they using in their day-to-day?
- 🗣️ When they go into other services/ solutions (or yours) what questions are they looking to answer?
- 🗣️ What Jobs are they looking to Get Done (Jobs To Be Done, aka- tasks)?
- 🗣️ "How do you do that today?"
- 🗣️ What don't they like about your product (your feedback helps us in creating a better product for your needs)

# QUESTION EXAMPLES

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## Behavioral questions - Get to know your customers' habits

- 🗣️ How does their typical day look like?
- 🗣️ At what point do they look at products with data/functionality similar to yours?
- 🗣️ "How do you feel about your current solution?"
- 🗣️ "What is the most frustrating thing about your current solution?"
- 🗣️ "How do you know you've had a successful year/month/day?" - this question really uncovers their success measurements. For B2B services this information can be highly valuable yet somewhat sensitive. Be polite about it.

## Follow up questions - Encourage them to provide more details

- 🗣️ "That's interesting - can you tell me more about it?"
- 🗣️ "Can you give me an example?"
- 🗣️ "what do you mean"?! "can you elaborate?"



# IMPORTANT TIPS

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🗨️ **I mentioned using the future tense**, instead, use the past tense -

“Do you remember the last time you had to do (TASK)? Can you tell me about it?”

🗨️ **If something isn't clear** - ask “so, just to make sure I understood you correctly, what you meant is X?”

It sends people the message that you are listening carefully to what they have to say, and that you truly want to understand them correctly.

it creates TRUST.

🗨️ **And the most important tip:**

Don't think of your customer as “a customer”. See them as **partners** in the process.

You don't need to sell them anything. You need to mostly listen.

or as Theodore Roosevelt said:

“Nobody cares how much you know until they know

HOW MUCH YOU CARE.”

Good luck! And may the ~~foree~~ customers be with you ;)



## **UX TACTICS FOR CONVERSATIONS WITH CUSTOMERS**

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