



Sample Interview & Survey Guides

The following pages contain starter scripts for interviews and surveys to be conducted as part of customer/employee research.

The language has been intentionally made generic, though in places it reflects our focus on branding and b2b marketing engagements. We recommend you customize it to your own industry, company and goals.

If you have any questions, reach out to hello@bluegreenbranding.com

Interview Guide: Introduction/disclaimer

[NOTE: assuming a video chat or phone call, start recording conversation immediately; within 2 minutes you'll ask for permission and may then stop the recording or continue on. This is so you can get a record of them saying yes or no. For an in-person interview, you can do some of the preamble before you start recording.]

Thank you for taking the time to talk with me today about [company].

My name is [interviewer name], I'm a [title/role] at [interviewer company]. We're helping [company] evolve their brand and marketing to better reflect who they are and how they want to be seen in the marketplace [or some other primary goal of your initiative]. A major part of that is talking to people like you, who they've identified as one of their best clients/partners/employees, to learn more about [company] and about the type of person/company they want to work with.

Now before we get rolling, I just wanted to cover a few logistical points and questions.

First, this may run as long as 45 minutes, which takes us to [time]. Does that still work for you?

Also, everything you say will remain anonymous. But if I hear a standout quote in there, I may circle back to you and ask if we can share that with [company]. Would that be ok?

Relatedly, we record these calls for our own reference for notetaking purposes; we don't share them with anyone else. Are you comfortable with having this call recorded? It's set to record by default, so if not, I'll just stop recording at this point.

Finally, just want to see if you have any questions for me before we begin.

Ok, let's get started!



Interview/Survey Guide for Customers & Partners

Please tell me a bit about your job. What is [interviewee's company], and what do you do there: title, overall role and responsibilities?

In your own words, how would you describe what [company] is and does?

[For referral partners] How do you introduce/explain [company] when referring them to prospects?

We're trying to understand the experience and mindset of someone who needs to hire a [company category]. So a couple things:

- First, tell me about your need – what was going on that made you seek a [company category]? Stakes, opportunities, pain points, concerns? What were the most important criteria (e.g. cost, speed, help you solve a difficult problem, unique capability, etc)?
- Then, tell me about your process – looking for a [company category], landing on [company]? Did you look at others, how did you screen them, why'd you pick [company]? What was the decision-making process like at your company?
 - [If they searched online] Where did you search? (Google, third party ranking site, etc) What search terms did you use?
 - [If they looked at other companies] What companies did you consider? What about them made them a contender? How did they compare to [company] on those important criteria?
- We understand that trust and comfort is very important when it comes to choosing the right [company category], especially if they're working outside your own area of expertise. What makes you and your company feel most comfortable hiring a company you don't know?
 - [If their response is sparse/nonspecific] How much do you care about the following? [you can even say: on a scale of 1-10, where 1 is "don't care at all" and 10 is "most important thing"]
 - Personal referral from someone you know?
 - How they rank on third party sites/resources?
 - Examples of their past work, including case studies?
 - Expertise in your industry specifically?
 - Any specific capability, skillset or knowledge?
 - Information about their process?
 - Quotes and testimonials from their current/past clients?
 - Informational articles and examples of thought leadership?
 - Information about the company core values and culture?

Now I'd like to hear more about your experience working with [company]:

- Deliverables – what did they do for you? What did that help you achieve? Any measurable results?
- Project management – working style, step-by-step process, communications, collaboration, people
- Best parts? Memorable stories, moments, experiences?
- Any part not go so well? Weaknesses, challenges, room for improvement?



Interview/Survey Guide for Employees

Please tell me a bit about your job. What do you do at [company]: title, overall role and responsibilities, how long you've been there, a little day-in-the-life.

I'd like to hear about the client work you guys do:

- How do you describe what [company] does? To someone in your industry? To a layman/friend?
- What do you think [company] does best? How does that compare to other companies in your space? Is [company] unique, better, different?
- What is your process like? Is it always the same, or does it vary considerably by client/employee?
- What could [company] do better or differently when it comes to client work and service?

Now let's talk about [company] as a place to work:

- How did you come to work there? How did you find them (personal recommendation, online search, etc)? Did you strongly consider any other companies (who)?
- What's most important to you re: job satisfaction? For example, is it about the kind of projects you're working on, or internal culture and process, or personal growth, or something else entirely?
 - [If their response is sparse/nonspecific] How much do you care about the following? [you can even say: on a scale of 1-10, where 1 is "don't care at all" and 10 is "most important thing"]
 - Get to work on projects that make an impact
 - Get to work on projects that challenge me, give me new skills
 - Fun place to work, enjoy my colleagues
 - Purpose/mission, values, feel I'm working for a good company
 - Feel valued, appreciated, respected, heard
 - Opportunities to learn and grow
 - Competitive pay/benefits
 - Great office (environment, location)
 - Stability – company is on solid footing, good job security
 - Something else?
- [Companion question to above] How good is [company] at delivering on these aspects you most care about? [can go item by item or focus on the ones that ranked most important]
- Describe your best day at [company]. (Ideally an actual day they remember; if not that, a hypothetical)
- What's something [company] could improve upon?

Tell me something about [company] that we can't learn anywhere else.

