



Big Book of Questions

ASK FOR THE RIGHT INFORMATION FROM THE START

Lindsay Tabas

Lady Engineer™



Lindsay Tabas
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Introduction

TALKING TO PEOPLE IS IMPORTANT

Section 1



GO TALK TO PEOPLE

TALK TO A VARIETY OF PEOPLE

In 2008, I worked for a small health tech company where I was the first person on the technology team to talk to the customers and not be a developer. Before me, sales & marketing handled all new feature requests. It was tough to get the sales team to relinquish that duty until one day when a crazy fire broke loose.

Sales had told the developers to build a feature that would lock Patient Notes (the notes a nurse makes about a visit) as soon as they pressed save. This meant they had no ability to edit. Sales got this requirement directly from one very relentless know-it-all user. Needless to say, when the feature launched, customer service was inundated from the larger community of our users who rather preferred to edit their work.

-
- **DEVELOP PRODUCTS BASED ON CUSTOMERS' INPUT EARLY AND OFTEN.**
 - **DON'T LISTEN TO ONE LOUD USER.**
 - **TALK TO A VARIETY OF PEOPLE.**
-



REALLY, YOU MUST TALK TO PEOPLE

FIGURE OUT WHAT THEY NEED

After that fire broke out, I had to step in to fix the situation. Locking down notes so no one could edit them broke a huge usability rule: Give your users the FREEDOM & FLEXIBILITY to control the system and make changes. This is why we like “Back” buttons and “Edit” links. This also why we’re annoyed when Facebook won’t let us change our Page username for 30 days after we set it the first time.

To avoid that disastrous outcome, the team should have talked to multiple customers, picking some that were very similar to this relentless user and some that were not similar at all. What is challenging when talking to your audience is that they’ll tell you what to build and they’ll tell you what they want, but it’s our job to figure out what they actually need.

-
- **THE USERS ARE ALWAYS RIGHT BUT THEY NEVER KNOW WHAT THEY NEED.**
 - **IF A USER TELLS YOU THE SOLUTION, ASK THEM FIRST TO DESCRIBE THE PROBLEM.**
-



PROJECT MANAGEMENT- INTERVIEWS

SCREENING

- Figure out what kind of people you're looking for based on your early-vangelist hypotheses
- What must-be true about a person in order for it to be worth your 30 minutes to talk to them?

RECRUITING

- Find people that fit the basics of your early-vangelist hypotheses
- Make sure they have some general awareness of the problem and are looking for a solution before you book them
- Schedule 30 minutes

WRITE THE SCRIPT

- Prepare your questions ahead of time
- First couple questions should be casual while also getting a sense for them
- Follow on with more specific questions

CONDUCT INTERVIEWS

- Follow your script!
- They talk for 25 minutes, you talk for 5 minutes

ANALYZING

- Write down your notes for each individual
- After several interviews, consolidate findings in the Industry & Customer Research Tracking template



Screening Questions

TALK TO THE RIGHT PEOPLE

Section 2



WHAT MUST BE TRUE?

In order to make sure we're talking to the right people, we leverage screening questions to verify they're worth our time. We can screen for the right people when we ask for introductions and make a call for participants. We can also use these screening questions as we get to know new people to see if they are a good fit. No matter what, we only want to be talking to people that would actually use our product. Else, if we act on feedback from people that would never use our product, we end up designing something unmarketable.

Screening questions should cover:

- Demographics
- Geographics
- Psychographics
- Behavioral

DEMOGRAPHIC & GEOGRAPHIC QUESTIONS

Only collect the following information if you think they are important factors that separate your early-vangelist from the rest of the market.

Name:

Country:

Location:

Exact Location:

Age:

Urban / Suburban / Rural:

Marital Status:

Primary Language:

Parental Status:

Education:

Employment:

Job Title:



BEHAVIORAL QUESTIONS

Behavioral Questions should address traits like:

- Technology Expertise
- Decision Making Style
- Online Engagement Style
- Mobile Phone Usage

EXAMPLES

Do you have a computer with access to Internet at home or work? (Screen Out if No)

How frequently do you connect to the Internet each week?

- Daily (Keep)
- 2-6 days/week (Keep)
- Anything less (Screen Out)

How frequently do you use [*dating apps, Excel, social media, mobile games, shopping online, etc*]?

- Daily (Keep)
- 2-6 days/week (Keep)
- Anything less (Screen Out)

Could you describe the last time you [*bought something online*]? What was that process like for you?

How frequently are you accessing your mobile phone?

- Multiple times per hour (Keep)
- Multiple time per day (Keep)
- Once per day or less (Screen Out)



PSYCHOGRAPHIC QUESTIONS

Psychographic Questions should address:

Personality Traits
Lifestyles Choices
Opinions, Attitudes, Interests, Hobbies
Values
Degree of Loyalty

EXAMPLES

Are you currently looking to [*fundraise, accomplish a goal, improve your sleep*]?

Yes (Keep)

No (Keep but make note)

If no, are you planning to do so in the near future?

Yes (Keep)

No (Keep but make note)

Have you done [*goal*] in the past? Were you successful?

How often do you [*do X Activity, paint your nails*]?

If you don't mind sharing, what are your opinions on [*X, specific issue*]?



MORE SCREENING QUESTIONS

How long have you been a [insert job title]?

How large is your company?

What is your general philosophy about your [career/industry]?

What is your [ex: managing] style? What kind of [job title/ ex:manager] are you?

Can you tell me about any apps (personal/professional) that you've learned how to use in the past year?

What things (software, company rules etc) are in place that make your job easier or harder?



Sample Interview Script

Section 3



OVERVIEW- YOUR SCRIPT

Ahead of your first research interview, you are going to compile an interview script based on a selection of topics for your current phase of research.

If you have multiple people on your side doing the interviewing, you should designate a single facilitator to lead the discussion, follow the script, and asks specific questions. All other observers write their questions down and pass them to the facilitator; the facilitator decides which questions to ask.

The high-level outline of any script starts with an introduction, then followed by a warm-up set of questions to get to know the participant. The meat of the interview is focused on 1+ topic areas of interest. Finally, the final 5-10 minutes of the discussion are open for free questions and answers between you and your participant(s).

Part 1: Introduction

Part 2: Basics

Part 3: [TOPIC INTEREST AREA 1]

Part 4: [TOPIC INTEREST AREA 2]

Part 5: [TOPIC INTEREST AREA 3]

Part 6: Wrap-up

On the following page, I have a sample User Interview Script. I wrote this script while working for Gust, an online platform angel investment groups use to evaluate startups applying for funding.

In the script, I highlight parts of questions to adjust based on how the person answers.



USER INTERVIEW SCRIPT

Small Chat (1-2 minutes)

- Hey [_____], how's your week going?
- Where are you located?
- Thanks so much for agreeing to talk to me.
- Alright, well we can dive right in and get started with this call if you want?

Introduction

Okay, so I would love to start off with some brief bullet points to set the stage.

- First, this phone call is 100% confidential. I will not be sharing with anyone that we talked nor the contents of our conversation
- Second, this call is set for 30 minutes. Do you have a hard stop at [INSERT END TIME], in case we go over?
- Third, my goal is to really learn about you and your experience with *[fundraising]*. As far as I'm concerned, everything you say is right, and you are the expert. Nothing about this is a test of your expertise, and please feel free to speak freely about what you like and dislike.



These upfront questions should address some of the initial information you need to shape your line of questioning. Most often, these are questions around the behavioral and psychographic traits that define your early-vangelist.

Basics (5 minutes)

Tell me a little bit about [your startup] and your role/responsibilities:

What stage would you consider your business to be in?

You had mentioned [that you would really like advisors and mentorship, and that's why you are researching investors and fundraising.] Can you expand on that?

You also mentioned [raising money through friends and family in the past]. Can you tell me a little bit about how that process went for you?

Did you use any tools to manage this process?

What worked and didn't work?

← *Make a note of any follow-up questions you may want to ask based on how the person answers*

Have you ever applied to investor groups? Why or why not?



These next set of questions should start broad - get an idea for their typical day, or typical process. Ask for stories and specific examples.

Raising Friends & Family (10 minutes)

You mentioned that you raised money from friends and family. How did you decide that raising money was your next step?

Were there any specific challenges you were facing in your business that brought you to the conclusion that you needed to raise? Can you tell me more about those challenges?

Looking back, could you describe your overall process? Where did you begin?

Where did you learn about raising from friends & family?

What resources did you use to organize yourself?

Could you describe 1 or more particularly difficult moments during the process?

What tools did you use to help manage this process for yourself?

How did everything end?



These next set of questions can narrow down to the tools they use or used to help solve the problem.

Portraying Your Startup Online (10 minutes)

You had said that you signed up for Gust to list your startup. Could you describe that experience for you?

Do you remember what you were doing when you decided to sign up?

Did you sign-up right away or did you wait for another time? Why or why not?

Do you remember how you learned about Gust?

Have you ever applied to investor groups via Gust? Why or why not?

Where else online are you listing your startup?

How frequently are you visiting those sites?

How are you using them to advance your business?

Are they meeting your expectations?

Could you describe how you used *[any other tools]* in raising your friends & family?

Was that *[tool]* helpful?

What did you or did you not like about that *[tool]*?

Do you recall anything you wish you could have done, or how you wanted to use it?



The last 5 minutes are held for you to wrap up. Ask any final questions or let them ask you questions

If time... (5 minutes)

How long did you expect fundraising to take versus how long it did that?

Now that you've been through the process, what advice would you give to other people who are just starting?

Do you have any questions for me?



Library of Questions To Ask

Section 4



What do you ask?

Ask a “grand tour” question

“Could you describe a typical day are you [office]?”

Ask a “mini tour” question

“Could you describe how you take calls?”

Ask for a story

“Can you tell me about a time when that happened?”

Ask for an example

“Can you give me an example of that?”

Can you tell me about a time you [experienced the problem]

- What did that feel like?
- Who did you turn to first?
- How often does this happen?

Describe what you did at the time to solve [problem]?

- Did that solution work for you? Why or why not?
- What other solutions have you considered?

What solutions have you cobbled together or DIY-ed?

- What do you feel like you still need?
- How are you figure out how to [solve problem, ex: pay yourself]?



Clarify expectations

“When you were doing X, what that was you expected? If not, what did you expect?”

Clarify Activity

“What did you learn from that whole experience?”

Generalize

“Do you often experience X this way? Do you often get problems with [X tool]?”

Get behind the behavior

“Is that the only [perceived hurdle] that prevents you from...?”

Which software tools are you currently using throughout your day?

- Which ones do you love and which ones do you hate?
- What do you love? (Specific features or value propositions)
- Do you pay for any of these? How much?

What kind of information do you not have in order to solve this problem that you feel like you need to be successfully?

Pie-in-the-sky, if you could have your dream solution, how would it work for you? In this dream, pigs fly, so tell me!

On the flip side, what would you keep as it is right now? Why?



Repeat

“You said you usually start with [insert Step 1]...”

Rephrase

“I am hearing you say...”

Summarize and draw a conclusion

“So what I am hearing you say is that the way you solved [insert problem] is [confusing/easy/difficult], but...”



OTHER QUESTIONS

From this whole conversation, I'm curious, *[INSERT NAME]*, what is your ultimate goal? What's your dream? Why struggle with *this*?

In think about all of these challenges that keep you from *[insert goal]*, how painful is *[most valuable problem]*?

What else have you spent money on to address *[most valuable problem]* or get to *[insert goal]*?

Where do you learn about new applications?

Where do you go to learn more about this space?

Do you have any specific thought leaders you love?

