
The Mathis Group's Messenger

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Successfully Interviewing Your Customer

Whenever you begin a new task, it is vitally important to gather all the necessary information up front. This may include interviewing your customer. There are many who think there is little or no need to interview the customer. Many project managers are pressured to create a plan and quickly get a team up and going with almost no information about what the project is to accomplish. Because of this pressure, the interview process is sometimes overlooked or done in a haphazard manner. The sad reality is that it has become the culture of many organizations to start a project without detailed requirements or a customer interview.

The customer interview process is used to establish a foundation for the need of the project and to prevent future problems or misunderstandings. The requirements gathering interview is not something nice to do; it is a necessity! It is the only way we can plan on increasing our potential of completing the project with fewer headaches.



There are several benefits of conducting a requirements interview which will improve the odds of running a successful project.

You can identify the real needs, requirements, and goals of the project.

Interviews allow the project team to create a plan based on the real needs and goals as presented by the customer. Identifying the actual goals of the customer allows you the opportunity to base your plan on foundational standards

which are in alignment and will ultimately be measured by the customer.

You can determine the steps of action to fulfill the requirements.

Determining the steps of action means the project team will design a plan based on the information which has been accumulated from the customer. After collecting this information, you will analyze it and create actual deliverables.

You can know ahead of time the real measurements of success.

How the customer determines success in a project is important. Too many project teams play the guessing game on measuring the success of a project. Unless the customer and the project team are working to come up with a joint measurement of success, there will always be the impression that the project missed something and did not function as desired.

You can gain real help from your team in reaching the goals faster.

When you need to speed up the project or move the project decision along faster, you can gain a great deal of internal expertise and know-how from your project team. Today, the greatest knowledge can be delivered from the front-line worker who does a job over and over again. Although, this can only take place if all information, goals, and data have been given and explained, and the communication is open.

You can prioritize the important requirements for better tracking.

Prioritizing the most important requirements of a project is very important, especially as a measurement of success.

*Success will not lower its standard to us.
We must raise our standard to success.
Randall R. McBride, Jr.
Clergyman*

(continued on page 2 *Successfully Interviewing Your Customer*)

The Mathis Group's Messenger

(continued from page 1 *Successfully Interviewing Your Customer*)

When working on a project it is vital to understand how each requirement is prioritized in the mind of the customer. This understanding allows each team member to realize that, in case of a crisis, some requirements will have less impact on the customer and might have the capability of being changed.

You can increase your chance of success by knowing all the goals and requirements up front.

The last benefit is that you will know all your goals and requirements early. This allows you the capability of being able to make adjustments on the front end of the project, and you will be able to move it toward completion in a faster, more cohesive manner.



Sometimes conducting an interview is extremely difficult because the customer has not been educated in this process and has no knowledge or understanding as to why the interview should happen. It is for this reason that, at times, a series of meetings is needed to help educate the customer on the new process and the reasons why your projects will be including this level of interview. During this education time you should:

1. Lay the proper foundation
2. Make this event relaxed
3. Take notes and document comments
4. Be supportive
5. Get detail, detail, detail

When interviewing the customer, there are two fundamental types of questions: open ended and close ended. Open ended questions cannot be answered by yes, no, or one word answers. The value of using open ended questions is it allows the customer the opportunity to tell you anything he or she desires about the problem being faced and the project which will solve it. Close ended questions are direct and clear up details and anchor decisions. When using close ended questions, you will notice they are much more precise, and they allow you to nail the customer down on something you do not understand. You can be very specific in making sure you understand what the customer wants.

Once you have completed the interview process, it is time to give the customer your recommendations. It is not uncommon to make recommendations to the customer as a matter of guiding them toward a more detailed explanation of the scope of the project they are seeking.

Discuss and present one idea at a time.

When making recommendations to your customer, it is important that you do not overwhelm them with numerous topics at once. The more topics the customer has to think through or decide upon, the higher the possibility they will get confused and make no decision at all. To reduce this from happening, it is better to present one idea at a time in a manner that leads your customer toward a decision.

Get confirmation on each point before you move forward.

After you have discussed each idea, it is important to get some type of confirmation from your customer before you move to the next. This confirmation can come verbally, in writing, or, as a last resort, body language.

Be specific with your recommendations.

Some interviewers think their role should be one which does not guide the customer in any direction, but allows the customer the opportunity to always have control. This makes sense in many situations; however, when interviewing a customer, it is possible they do not know what direction they are headed.

To effectively deal with this, the interviewer should make a specific recommendation to the customer based on their experience and understanding of the project requirements. The interviewer should remember that a specific recommendation is stronger than one which possesses a great deal of ambiguity. The specifics of the recommendation allow the customer to accept or reject

(continued on page 3 *Successfully Interviewing Your Customer*)

You have to have confidence in your ability, and then be tough enough to follow through.
Rosalynn Carter
U.S. First Lady

The Mathis Group's Messenger

(continued from page 2 *Successfully Interviewing Your Customer*)

what the interviewer is saying. This decision permits both the customer and the interviewer to go in a new direction without any misunderstandings.

Be prepared for any questions.

Questions from the customer are common when making recommendations. Some interviewers become extremely concerned due to the enormous amount of questions that a customer will fire back at a recommendation. It is good to remember that when a customer is asking questions, they do not normally do this with the intent of disagreeing, but they are only asking for more information or clarification.

Create notes on what you want to say and recommend.

Recommendations should not be something that is just off the top of an interviewer's head. It should be strategic in manner and be well thought out and detailed. To make sure your recommendation is clear and specific, it is beneficial for the interviewer to write down the exact proposal.



Keep the meeting logical or chronological to assist in understanding.

Keeping the meeting logical and chronological will make the difference on whether or not the customer understands the full depth of your recommendation. There are many individuals who cannot grasp a recommendation unless they see it in sequence as it relates to the project.

Keep all terms and language as simple as possible.

This is not a time to show off with hundred dollar words or acronyms which the customer does not understand. Your goal is to make sure that the customer understands what you are recommending and why in the simplest format.

Be a good listener to all customer comments.

As you interact with the customer during the recommendations, make sure you listen to their exact comments. You are trying to determine if the customer fully understands the recommendation and why it should be considered, as well as if there are any objections. Make sure to listen to the customer and analyze what is being said prior to making additional comments.

As you can see, it is very important for the modern project team to go the extra mile and interview the customer. Unless a detailed interview is accomplished prior to planning, it is almost impossible for a project team to meet the requirements demanded by the customer.

The interview process should be structured and precise in gathering the information, goals, and success factors of the project. When this is done correctly, the details and clarity of the project are focused, and the project team is now ready to plan the project in detail.

This article is a synopsis of "Successfully Interviewing Your Project Customer and Gathering Detailed Requirements" by Dr. Keith Mathis. For the complete article, please visit our website at www.themathisgroup.com or www.pmiexpert.com



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