Background pattern

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### Customer Journey Interview Guide

### Project Name (Business Area, Division)

[Additional info e.g. Date, Author etc]

# About this template

# *(delete these instructions before finalising your document)*

This template is designed to assist you in running user testing for a product or service in Queensland Government, and is part of a suite of similar product available in the Digital Design Playbook.

*Guidance is provided in italics, delete these before finalising your document.*

Variables such as the project name or customer name are in [brackets]. Don't forget to update them with the details relevant to your project.

Sample questions and content you can use during the interview are in simple dot points for easy reading during your interviews.

Page breaks have been used to break up the content so its easy to flick through while you are conducting the interview.

## Customers interview guide

### Understanding the customer journey of [insert experience being researched]

*This section should provide a brief overview of the project and the research goal/focus, for example:*

[Business Area] has identified [problem being explored].

The focus of this customer journey mapping is to identify [insert goals/issues being explored here].

This research is focussed on [describe customer/stakeholder group] and will be conducted using [number] of 1:1 interviews with this customer/stakeholder group.

### Session schedule

*Include a summary of the sessions/interview you plan to run.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Location** | **Participant name** | **Session Time** |
| 24/05/23 | Virtual/Teams | Customer Interview | 09:00 – 10:00 |
|  |  |  |  |
|  |  |  |  |

* 1. Interview structure

### 

#### Session outline

*Update this session outline to suit your project and interview structure if needed.*

1. Housekeeping (5 mins)
2. Warm up (10 mins)
3. Prime the participant (2 mins)
4. Customer Journey Questions (30 mins
   1. Closing questions (5 mins)
   2. Observer questions (10 mins)
   3. Turn the tables (5 mins)
5. Wrap it up

#### About the Questions

The questions in this document are prompts only. Whilst we will follow the general structure of this customer journey interview, we won’t be asking these questions verbatim, and we won’t necessarily cover all questions in all sessions; the natural flow and pace of the conversation on the day will dictate the approach.

1. 1. Research method

#### Methodology

In a customer journey interview, we use open questions and scenarios to elicit information about a customer’s experience in a specific journey. This will allow us to visualise the customer’s journey through your service, uncovering any usability issues or pain points, helping us see what’s working well and potentially providing improvement opportunities.

#### Verbatim notes

Verbatim notes are word for word notes on exactly what customers said during the interview. Verbatim notes will be captured digitally by the dedicated scribe. Following the customers’ interview, we will analyse and synthesise all data for trends and patterns.

#### Consent Form

The consent form should be used at the start of every interview and can be downloaded [here](https://www.forgov.qld.gov.au/_resources/documents/digital-design-playbook/plays-documents/Consent-form-20230619.docx).

* 1. Interview focus

#### Goals

*What are the most important things that we want to understand with these customer journey interviews? Write an overview of your goals for the customer journey here.*

1. *Does the journey make sense to customers?* 
   1. *Can they complete the task without assistance?*
   2. *Can they complete the task without frustration or confusion?*
   3. *How they feel about their experience completing the task?*
2. *What opportunities are there to improve the journey?*

* 1. Interview content

#### Housekeeping (5 mins)

* Thank you for your time today.
* We work for the Department of Transport and Main Roads (TMR) and we're currently conducting research to help us in understand [problem] for [customer segment]
* With your permission, we're going to video and audio record the interview, and take a couple of photos. The recordings and photos will only be used as a reference to help us present the information we learn, and they won't be seen by anyone except the people working on the project or for learning and development.
* The information we speak about today is only for the purposes of this project and will not be used for any other reason. Your recording may be used for internal training purposes, but you will be anonymised.
* If you don’t mind, I'm going to ask you to [sign/read out loud] a consent form for us to record the interview. Please [read and sign/read out loud] the consent form to indicate you agree.
* [Share consent form and have participant read and sign]
* This session will run for approximately 45 minutes. If at any time during the session you need a break, or feel you need to end the session, please let us know.
* Do you have any questions before we begin?

#### Warm up (10 mins)

*These are sample questions to get you started, make them relevant to your project and customer journey map goals.*

**About you / [product or service]**

* Can you tell me a little about yourself?
* What part of [insert QLD region] do you live?
* What kind of [thing] do you have/use?
* How long have you had/used [thing]t?
* How often do you…?
* How long do you usually go out for?
* What kinds of occasions do you take your boat out for?
* Who is normally with you on the boat?
* Where do you normally take your boat out to?

#### Prime the participant (2 mins)

* In a moment I’m going to ask you to tell us about when you used [our product or service]
* Just remember, we’re researching the [product or service] experience, not testing you. None of us here today had any involvement with the delivery of [that product or service], so don’t feel like you need to hold back with any negative you may have feedback. *[NB. This is a great tip, even if you were involved in the design!]*

#### Customer Journey Interview (40 mins)

*Make sure you are capturing a tangible timeline of how the product or service occurred through the customer's lens. They may forget some things or have experiences that diverge from other customers’ reports, it’s ok, There will be an opportunity to group all your customers' information later.*

*Encourage participants to think out loud, asking open-ended questions to emphathise and contextualise the process, steps and feelings experienced by customers along the service delivery.*

**Journey questions (20 mins)**

* Why did you start engaging with the [product or service]?
* Could you describe your experience in detail?
* What were all the steps you took during the experience?
* Then what happened? What was that like?
* I want to make sure I understand this? Can you explain more?
* What did you like/not like during the described experience?
* What was good/bad during the described experience?

**Closing questions (5 mins)**

* Ask any quantitative questions here, such as asking the customer to rate the experience for a CSAT or CES score if relevant. You can find out more about these measures in the Benchmark and Measure success play. Overall, how would you describe your experience completing this interview?

**Observer questions (10 mins if there are questions)**

* \*Ask your observers if they have any questions

**Turn the tables (5 mins)**

* Before we wrap up, is there anything else you would like to share with us regarding [the problem space or issue]?
* Do you have any questions for us?

#### Wrap up (2 mins)

*Don't forget to thank your participant and let them know what the next step is for the project if relevant.*

* Thank you for your time today. You provided us with some great insights!
* We are going to use what you have told us and combine that with all the other feedback we are gathering to understand how to improve [product or service].