

Task: Gathering information from customers during a fact-finding interview

Your manager has sent you on a **fact-finding mission** to a new customer. You will visit the customer in their offices and interview them **to gather information about** their needs for a new project. Your team will later use this information **to come up with solutions** and a proposal.

Listen to your customer to understand their needs and priorities; make sure you have enough information to build your proposal after the meeting; **find out as much as you can** and take good notes; but don't confirm any solutions yet.

- Who do you typically speak to on these fact-finding meetings? (CEO, COO, Production Manager, IT manager ...?)
- Does your customer send you a "List of Requirements" document before the project or do they need your help to do this?
- What kind of information do you need so that you can come up with a solution for a customer? Does it cover the topics in the table below?

QUESTIONS

Open the table in the Google doc link from your teacher. Write as many full questions as you can in 10 minutes.

Current situation and current processes requiring improved tools	
Previous system, tools and processes, when were they installed/updated	
Future plans and strategy of the company, potential risks	
Capacity for implementation Is there a Project Manager, who is involved How many people, licences, users Where, which sites Timeframe and deadlines Budget	
Priorities What are your must-haves, should-haves, would-like-to-haves (but can't for now)	
Other	
Predict possible questions/concerns from customer	

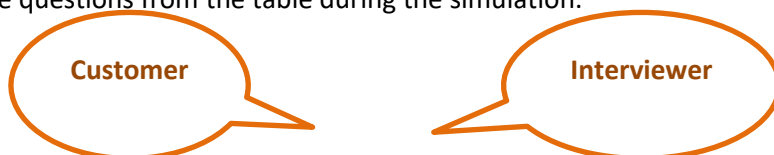
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Read the questions written by others in the group or by your teacher....

- Does everybody agree on these questions?
- Which ones do you think are the most useful?
- What sort of expressions will encourage the customer to tell you what they really want?
- What kind of language will help you get specific details?

TASK SIMULATION

Your teacher will ask you to form groups for a simulation. You will need to think of 2 real customers for the simulation. Use the questions from the table during the simulation.



When you have finished the interviews, compare the information you gathered on each of the customers.

Fill in what you learned in the Google doc from your teacher.

Customer A	Customer B

TASK OUTCOME

Did the 2 interview teams find the same information or different information for each customer?

Do the customers agree that the information represents them accurately?

Will you share the table of questions we created with other colleagues in your team?

FOLLOW-UP

Make a short recording (3 mins) summarising the information you gathered on one of the customers. The target audience for the recording is other members of your development team who will be working with this customer.

Send the recording to your teacher and the group.

This recording will also be used in the next class to generate options and alternative solutions for a customer.

OPTIONAL EXTRA

Read this article on sales questions. Leave a comment in the forum describing one useful tip from the article.

<https://www.coredna.com/blogs/open-ended-sales-questions>