

# GETTING FEEDBACK THROUGH CLIENT INTERVIEWS

Best Practice Guide & Resources



# How to Conduct Client Interviews

We always say that feedback is your friend, even feedback that may be hard to hear. The challenge with getting feedback is there are many ways it can be done. This guide focuses on helping you gather feedback from clients at a personal level through client interviews.

Client interviews differ from surveys and client advisory boards in that they are focused on the personal relationship you have with individual clients. Conducting client interviews can help you deepen the relationship, which results in greater client loyalty and referrals. Or, your goal may be to simply get feedback from a client you know will “tell it to you straight.”

Whatever the goal, this guide will help you define your process for client feedback interviews, and walk you through the steps to getting them set up.

## STEP 1: SELECT CLIENTS TO INTERVIEW

Identify how many clients and whom you want to participate in your interview. Determine the timeframe in which interviews will take place, typically over the course of a few weeks.

## STEP 2: THE ASK

We recommend personalizing the invitation, preferably asking in person or by sending a personal email to set up a time to meet. It is critical to set the stage and frame your conversation with the client appropriately. Start your request and conversation in an open and honest format.

“Hi Bob, I’m reaching out because I want to get some real feedback on our firm. I’m interviewing a handful of clients to...

*Select one of the following or create your own:*

- Understand how we can better serve and focus on our clients.
- Get feedback on how we can ensure that we deliver the quality of service our clients deserve as we grow the business.
- Discuss the services we offer and ensure we are addressing and meeting the needs that are most important to our clients.
- Get feedback on our brand and if it’s meaningful to clients.

I know that you’ll give me honest feedback, so I wanted to ask if you’d be willing to help. Are you available to meet for 30 minutes in the next few weeks?”

## STEP 3: PICK A VENUE

Your office or even virtual options can work for a location, but if possible, select a neutral location that will put your clients at ease and place you on equal footing. This should be an informal conversation and the venue should reflect that atmosphere.



## STEP 4: DRAFT YOUR QUESTIONS

Identify the core themes that you want to address by interviewing clients and draft a list of interview questions before you meet with each client. Keep the questions consistent and limit yourself to 5-10 questions. We have some examples to get you started on the following page.

## STEP 5: BE PRESENT DURING THE INTERVIEW

Before you begin the interview, there are three things you can do to stay focused and present.

- Start off with a few minutes of casual conversation. This gives you time to connect with your client before diving into the interview.
- Thank the client for taking time to meet with you. Gratitude helps you and the client stay present to the moment you are in.
- Let the client know you're taking notes in order to best capture their feedback.
- Share that while you can't promise you'll be able to address everything they bring up, your goal is to hear what they have to say.

During the meeting, your goal is to be an active listener and stay present. Remember to:

- Focus on the feedback your client shares, not on what you're going to say or ask next.
- Seek to understand and ask follow-up questions if you need clarification.
- Avoid shifting into "problem solving" mode. You are not trying to resolve or explain why something is the way it is. Your only job is to listen and hear what your client has to say.

## STEP 6: FOLLOW UP

Follow up with a communication that shares exactly what information was valuable or used to make improvements. Be sure to also send a personal thank you to every interviewee.



# Question & Discussion Topics

Below are examples questions you can consider as part of your agenda. Keep your questions open-ended to encourage dialogue and discussion. Also, be sure to customize questions so you are comfortable asking them.

## SERVICES & CUSTOMER EXPERIENCE

We are consistently striving to improve our client experience and services but find that personal feedback is the best way to achieve this.

- What do you love the most about the service you receive?
- What do you find most frustrating about the service you receive?
- Are we meeting your expectation regarding communication and follow up?
- What is your most memorable experience with our firm?
- Do you know what services we provide, for example...?
- What services do we not offer that you would like to see us offer?
- Are there specific times and situations where you are most likely to need to speak with us?
- Do you feel as if you have a close relationship with specific team members? If yes, why?

## REFERRALS

As we look at the service and experience we deliver to clients, we are surprised that many clients openly share they are willing to refer, but then often don't. We'd like to better understand why, and I was hoping you'd be willing to share your thought with me.

- Is our service an experience worth referring?
- Do you know how to refer someone to our firm and what happens when you do?
- Do you know all the services we provide, for example...?
- Do you (or other clients) come across people you could easily refer?
- Would you know how to identify someone who would be a good fit for our firm?
- How comfortable are you referring people to our firm?

## MARKETING & GROWTH

Our vision for the business is to [become the..., grow to..., etc.]. As we grow, it's important that we focus on areas that improve our experience for current clients while supporting new client growth.

- We do our best work with [describe ideal client]. Do you have any feedback on where or how we can engage with our ideal clients?
- What aspect of our work together is most valuable to you?
- What types of events or communications do you think a potential client would find valuable?
- What types of events or communications do you think a potential client would find valuable?
- What helped you make the decision to work with us? Was there a deciding factor?
- What are you most concerned about as we look to grow?
- We send a lot of educational content and communications. Do find it valuable and do you share it with others?



# Sample Client Interview Agenda



YOUR LOGO  
HERE

## INTRODUCTION SCRIPT

Start with personal touch-base and introductions, then set the stage for the conversation. You may even consider making light of the fact that you're taking notes. Whatever you say, it should be authentic and in your own voice.

*"Thanks for meeting with me, Kiara. It means a lot to me personally that you're willing to take extra time to help support our firm. As I mentioned before, I'd love feedback on ways we can better serve our clients and grow the business without impacting the quality of service our clients deserve. This is similar to an "advisory board" but I really wanted to hear personally from our best clients.*

*I have a few specific questions, but feel free to share anything you want. And, if you don't mind, I'm going to take notes while we talk. [Natalie keeps reminding me that she's the one in our office with the photographic memory.]"*

## INTERVIEW QUESTIONS

- What do you love the most about the service you receive?
- What do you find most frustrating about the service you receive?
- Is our service an experience worth referring, and why or why not?
- What services do we not offer that you would like to see us offer?
- As we grow, our ideal client is [insert description]. What types of events, education or communications do you think a potential client would find valuable?
- What helped you make the decision to work with us? Was there a deciding factor?
- What are you most concerned about as we look to grow?
- We send a lot of educational content and communications. Do you find it valuable (frequency and content)? Is it something others might find useful?
- Anything else we should know?

