Question checklist

☐Inventory what you want to learn, and why it's important to learn it. What will learning about this allow you to do next? Then start writing questions around those themes.

☐Are you **disarming politeness** and creating safety? Sometimes people are afraid to answer truthfully, or want to be helpful. Neither helps you. Assure the subject of their anonymity, the importance of getting to the root of problems, and that their stories will help better understand the impact of _____ on people like them.

☐Does it sound like a **survey question**? Does it sound like you are trying to get a very specific answer—or to get the subject to commit to something specific? Is it apparent what you want to learn—and not learn? You don't want that. Great questions allow the subject to **surprise** you with their answers.

☐Is it **leading**? "Which bank do you dislike the most?" If your question is about banks, ask about the banks they've used and get stories about their experiences. "What should (BU) be doing for its employees?" Besides being hypothetical, it assumes for the subject that (BU) should be doing anything-- and limits the subject to only what they think the (BU) should do. Let the subject tell you about what's missing in their world, then you can decide if the (BU) should be the one to tackle that.

☐Is it **loaded**? "What one thing about your manager drives you crazy?" There's no environment safe enough for that one—and *maybe* nothing drives the subject crazy. Instead, "Tell me about management behaviors and how they impact your work?"

☐Is it **open-ended**: does it allow the subject to **tell a story** about the main ideas of your question? "Tell me about a time when", "What happened when", "When it happed the last time", "Tell me about the first time it happened."

> Ask the **"grand tour" question**, where you ask the subject to take you through an entire process or experience step by step. Don't hesitate to ask **mini-tour questions** during the answer to unpack key points in the journey.

> **Experience questions** pay value to the subject and draw out their sense of pride: "you probably have a lot of experience in that—tell me about it."

☐Is it **Closed-ended**: yes, no, or short answers? Reframe it! Not much room to be surprised or learn anything new.

> ☐EXCEPTION: **clarifying** questions like, "do you use public transportation?" that allow you to go deeper into the experiences.

☐**Hypothetical** questions: "would", "should", "could", and "if" are red flags. You can't get reliable information about a world that doesn't actually exist for the customer. Remember: **hypothetical question, hypothetical answer!**

☐**Jargon**: such as, "engagement", "empowerment", "OneAmfam". These are **ambiguous** and rely on the subject's knowledge of that term—and it's probably different from yours. Ditch the term, and explain it in layman's terms. Jargon can be used to bring people together, but most often it separates them.

☐Ask about **behaviors**. "What have you tried to solve for that?", "How did you deal with that?", "Then what happened?" Behaviors tell you how severe the problem is and if, and to what lengths, your customer is willing to go to solve for it. They also clue you in to ways to solve.

☐Follow the problem **home**. If it's a business problem, find out how it impacts the customer even after they punch out for the day. Problems that follow people home are some of the most **emotional**. Ask questions that go there!

☐Do you have a good **follow-up question**? What are some likely answers to your question? What would your follow-up be?

Active listening checklist

☐ Always interview in **pairs**. One conducts the interview, the other takes notes and prompts the interviewer for anything they may have missed.

☐ Let your subject know **why** you're talking today. And it's not to solve a problem, it's to "hear their story". Answer any questions they have about your time together.

☐ **Lose yourself**. Your baggage will weigh down the interview. Think about your interview. Get excited about what you might learn. Think about a conversation when someone else just listened to you. Channel that.

☐ Your **script** is a path, not a rule. It's OK to get off that path if it gets you to an amazing place of learning.

☐ Be **interested**, don't act interested.

☐ Be intentionally **ignorant**. Whether you know what the subject is talking about or not, ask "what is that?", "Help me out—I don't think I know about that…", "why did that happen?" It triggers people's natural instinct to teach or help you.

☐ **Repeat** yourself—and what your subject says. Remind them of the importance of their candor and why you're talking, when appropriate. Parrot back key things that they say: "so what you're telling me is _____?" You can even parrot it back **wrong** to elicit a stronger response, correcting you. Just don't use that one much, they'll think you aren't listening carefully.

☐ "Tell me more about that", "That's really interesting/fascinating". **Encourage and reward** your subject as they share. They probably are not used to doing it, so keep encouraging them.

☐ "Unpack that for me." When you hear someone use a **metaphor**, for instance, "it was like pulling teeth…" Stop and ask them to explain what that means. Metaphors are mental shorthand for complex situations; they are shortening it up to save you time. You want to know the whole story. The gold lies just beneath!

☐ "How did that make you feel?", "Why?" **Emotions** drive adoption of solutions. Find out where your customer is.

☐ **Show** empathy. "Thank you for sharing that. That sounds like a tough situation you were in. What happened next?"

☐ The "**five whys**". Keep asking until you get to the root cause of the problem. Surface causes might look exciting, but the root cause is the one that will help you, help your customer.

☐ Did you ask for **referrals**? Who else shares this experience with the problem/situation? Best practice ask: "The last time you talked with someone about (topic), who was it? Did they share some of your feelings? Would it be OK if we contacted them to learn more? May I use your name?"

☐ Look for **contradictions**. When someone says one thing, then does the opposite--- details actions of theirs that contradict what they said—stop and ask questions to understand the delineation lines in their mind. Get ready to be surprised! *Example: "I don't share any information online… Oh, yeah, I love Google! Use it every day."*

☐ **Body language**! What are they saying with their posture, facial expressions, hand gestures, and tone of their voice?

☐ Embrace **silence**. Allow the subject to think about your question. If they appear to be rushing or feeling pressure to answer, let them know that they can take their time!

☐ "What question **didn't** I ask you, that I **should** have?" **Boom**! If you missed the boat, it can come back right here.

☐ **Thank** the subject. Let them know how important the time you spent together was.