

B2B Case Study Interview Questionnaire

1.1.20

To plan your B2B case study interview, script a list of questions. Use them as a guide to support you during the call. Write more questions than you think you'll need, but don't feel like you have to use all of them.

As your contact responds during the interview, use her responses to ask secondary questions that take the discussion even deeper.

1. Shake hands "virtually" and introduce yourself

To grease the conversation skids, recap the purpose of the call and confirm the amount of time your contact can talk (30-45 mins. is preferable).

Use a timer to track the call length so you're respectful of your contact's time. This will also allow you to reorder your questions in the event time runs short.

Start with the basics:

1. Where is your company located?
2. How many employees work at your company?
3. How long have you been in business?
4. Can you provide a quick overview of what your company is trying to accomplish?
5. What is your position and title?
6. How long have you worked for your company?
7. What do you like best about your job?

2. Client's initial situation

1. Describe the situation at your company before engaging with us?
2. When did you realize you had to take some action?
3. What solutions did you try?
4. Why did those solutions fall short?

3. What problems and challenges was the client experiencing?

1. Describe problems or challenges your company was facing?
2. How serious were the problems?
3. How did those problems impact your business?

4. What solutions did you provide the client?

1. What products/services did the client buy? Why?
2. How did those solutions solve the client's problems?
3. Did the customer purchase any ancillary products or services such as training, customizations, etc.?

5. How did the implementation go?

1. What level of work effort was required by your team?
2. Were there any hiccups or situations that you wished you would have known about going into the project?
3. If training was part of the project, how did it go?

6. What results were achieved?

1. When did you start seeing improvements?
2. What were those improvements?
3. How has our solution helped your organization?
4. Any success measures, statistics, or specific numbers you can share?

7. Why did you choose our company?

1. How did you first hear about our company/product?
2. What process did you go through to make a purchase?
3. Who was involved in the purchase decision?
4. What made our product stand out?
5. If they issued an RFP, how did our product match up to competitors?
6. Were any parts of the buying process problematic?

8. Were there any surprises along the way?

1. Did anything unexpected happen during the engagement?
2. What suggestions would you give to others considering a solution like ours?
3. What did your team like best about working with us?
4. What are 2-3 reasons your company might recommend our solution/company? Why?

9. How can we improve?

1. We're always looking to improve. Are there features/functions you wish our product offered?
2. Are there any parts of our solution you wished worked differently or better?
3. Is there anything we could have done differently that would have made the overall experience of working with us better?

B2B Software Case Study Writing Services

If you need help conducting a case study interview and/or writing a B2B customer success story, contact:

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