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DOCUMENT TEMPLATE

Customer Research & Interview Synthesis

What this guide helps you create — and who it's for

Two linked documents: a **research plan** (the one question you're answering, who to talk to, the interview guide that gets past opinions to behaviour, and the stopping rule) and a **synthesis template** (a structure for turning a stack of messy conversations into a few clear findings, each pointing at a decision).

Use this if you're about to make a real call — build X or Y, price at A or B, who's the actual beachhead — and you'd be guessing. **Skip it** if you've already done focused research on this exact question recently; don't re-run it out of habit.

HOW TO USE THIS GUIDE

- 1 Read sections 02–04** so you know why research without a decision behind it is just nice chats — and why “would you use it?” gets you nothing.
- 2 Open your AI chatbot** — the one you set up in guide 01.
- 3 Make the decisions in section 03** — the one question, who to talk to, behaviour over opinion, the stopping rule. Do this *before* you touch the prompt.
- 4 Copy the prompt in section 05** into the chatbot. Paste your Founder Context Block where it says to, and fill in the `{curly braces}`.
- 5 Send it**, then sharpen what comes back using the four moves in section 06 — one at a time.
- 6 Run the interviews; then fill the synthesis template — don't skip it.** The conversations are worthless until you've extracted the patterns and named the decisions.

Why this document matters

Most founder “customer research” is a string of pleasant calls that produce no conclusion. There was no decision driving it, so there’s nothing to conclude. The questions were leading — “don’t you think it’d be useful if...” — so the yeses mean nothing. The people were whoever would take the call, not the ones whose answer actually matters. And the synthesis, if it happened, was a dump of quotes, not a set of findings.

Research that’s worth doing starts from a decision: *I’m about to choose between X and Y, and I want evidence first.* It talks to the right five-to-eight people — the ones whose behaviour bears on that choice. It asks about what people actually *did*, not what they say they’d do (people are unreliable narrators of their future selves). And it ends in a synthesis that names the patterns and, for each, the decision it points to. Then you make the call — informed, not guessing.

“Would you use this?” gets you a yes that means nothing. “Tell me about the last time you had this problem” gets you the truth.

It comes from four decisions. Section 03.

The thinking framework — what to settle before you prompt

The prompt builds the plan and the synthesis template. These calls are yours.

— What’s the one question?

Not “learn about our customers” — a specific decision the research will inform. *“Is the real beachhead ‘sole traders in the trades’ or ‘sole traders generally’?” “Will people pay £15/mo or do we need a free tier?” “Is the problem the receipts, or the not-knowing-where-you-stand?”* If there’s

no decision behind it, the research is a hobby. Name the question first; everything else follows from it.

— Who do you talk to?

The right five-to-eight people for *that question* — not the easy ones. Current users? Churned users? People in the beachhead who looked and didn't buy? Different question, different people. Talking to your friends and your existing fans feels productive and tells you almost nothing; talk to the people whose answer would actually change your mind.

— Behaviour over opinion

The interview guide has to dig into what people *did*, not what they think they'd do. "Tell me about the last time tax season crept up on you." "Walk me through how you handle receipts now." "What did you try before this?" These get the truth. "Would you pay?" "Do you think this is useful?" "How much would you spend?" — these get politeness and projection. Ban the second kind from your guide.

— What's the stopping rule?

You're done when new interviews stop surprising you — usually five-to-eight for a focused question, not an arbitrary "we'll do 30." If interview six tells you nothing new, you've probably got your answer; if interview eight is still surprising you, the question's broader than you thought (or your sample's too mixed). Let the surprises tell you when to stop.

DECIDE	WEAK DEFAULT	WHAT GOOD LOOKS LIKE
The question	"understand our customers better"	"is the real beachhead 'trades sole traders' or 'sole traders generally'?"
Who to talk to	"whoever will take a call"	"6 trades users + 4 non-trades users + 4 trades signups who churned"
The questions	"would you use it? would you pay?"	"tell me about the last time... / walk me through how you currently..."
Stopping rule	"we'll do 30 interviews"	"stop when 2-3 in a row stop surprising you"

Common failure modes — what generic output looks like

Ask an AI for “customer interview questions” cold, and you get a list of leading questions. Reject these:

× WHAT TO REJECT ON SIGHT

- **Research with no decision behind it.** Eight friendly chats, a “key take-aways” slide, no conclusion you can act on. A hobby with a clipboard.
- **Leading questions.** “Don’t you think it’d be helpful if...?” “Wouldn’t you love a tool that...?” Every answer is a yes, and every yes is worthless.
- **The wrong people.** Your mates, your superfans, anyone who’ll take the call — not the people whose answer would actually change the decision.
- **Asking about the future.** “Would you pay \$X?” “Would you use this weekly?” People say yes, then don’t. Ask about the past; that’s the only data they actually have.
- **The transcript-dump synthesis.** A document of quotes with no patterns extracted, no counts, no decision pointed at. The conversations were the easy part; the synthesis is the work.

If the plan looks like this, there’s no decision behind it — back to section 03.

The prompt template

This is the bit that does the work. You don’t need to understand prompting — you just need to do these five things, in order:

RUNNING THIS PROMPT – STEP BY STEP

- 1 **Copy the entire grey box below** (all of it, top to bottom).
- 2 **Open your AI chatbot** and paste it into the message box. Don't press send yet.
- 3 **Paste your Founder Context Block** where the prompt says `{paste your Founder Context Block here}` — delete that line and put your block in its place. (No Context Block yet? Build one in guide 01.)
- 4 **Replace every `{curly-brace}` bit** with your own answer — your four decisions from section 03 go straight in. If you're unsure of one, leave it; the prompt will ask.
- 5 **Send it.** Then go to section 06 to sharpen what comes back.

PROMPT TEMPLATE

→ Copy the whole box. Paste your **Founder Context Block** where it says to, then swap everything in `{curly braces}` for your own answers before you send it.

You are helping me run customer research properly – a plan that's driven by a real decision, an interview guide that gets past opinions to behaviour, and a synthesis template that turns the conversations into findings.

Here is everything you need to know about my company:

`{paste your Founder Context Block here}`

Four things I've decided (use these – don't broaden them):

- The one question / decision this research informs: `{e.g. "is the real beachhead 'trades sole traders' or 'sole traders generally'? – we're about to aim all the GTM at one of them"}`
- Who to talk to (the right 5-8 people for THIS question): `{e.g. "6 trades users + 4 non-trades users + 4 trades signups who churned"}`
- The principle: behaviour over opinion – questions about what people actually did, never what they'd do/pay/think.
- The stopping rule: `{e.g. "stop when 2-3 in a row stop surprising me"}`

Produce TWO documents:

PART 1 – THE RESEARCH PLAN

- a. The question – restated as a specific decision.
- b. Who to talk to – the profile of the 5-8, and where to find them.

- c. The interview guide – 6-8 questions. At least half must start "tell me about the last time...", "walk me through how you currently...", "what did you try before...", and include one "magic wand" question. Explicitly NO "would you / do you think / how much would you pay" questions – if I asked for one, replace it with the behavioural version.
- d. The stopping rule – restated, plus what it means if interview 8 is still surprising me (sample's too mixed, or the question's broader than I thought).

PART 2 – THE SYNTHESIS TEMPLATE (to fill in after the calls)

- Patterns – a structure for 3-5 patterns, each: the pattern in one sentence; how many of the people showed it; the single sharpest verbatim quote.
- Surprises – things I didn't expect to hear.
- Non-findings – things I thought I'd hear and didn't (just as important).
- For each pattern: the decision it points to.
- "What would change my mind" – per finding, the evidence that would flip it.

Rules:

- Not a quote dump. The synthesis must force patterns, counts, and decisions.
- If I clearly haven't shipped yet (pre-product), make the guide about the problem and current workaround only – never mention the product.
- Anything in `{curly braces}` is a slot for me to fill. If I left one blank, ask me for it – don't invent it.

When you're done, tell me which question in the guide is most at risk of leading the witness, and rewrite it.

06

How to iterate when the output is weak

First drafts come back with leading questions and a vague synthesis. These four moves fix that – one at a time:

1. **Sharpen the question to a decision.** *“Restate the research question as a specific choice I’m about to make. If it’s still ‘understand customers,’ tell me what decision I’m actually trying to inform.”*
2. **De-lead the guide.** *“Rewrite every question so it asks about something the person actually did, in the past. Delete anything that asks what they’d do, would pay, or think is useful. At least half should start*

‘tell me about the last time...’ or ‘walk me through how you currently...’”

3. **Re-pick the interviewees.** “For this question, who are the 5–8 people whose answer would actually change my decision? Replace ‘easy to reach’ with ‘answer matters,’ and tell me where to find them.”
4. **Make the synthesis do work.** “The synthesis template must force me to extract patterns (with counts), surprises, and non-findings — and to name the decision each pattern points to. Not a quote dump. Add a ‘what would change my mind’ line per finding.”

If two passes don’t fix it, you don’t have a real question yet — back to section 03.

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A worked example

Sam from guide 01, Ledgerwise — before pointing all the GTM at one segment.

▶ WORKED EXAMPLE — SAM’S RESEARCH, PLAN TO FINDING

The question: “Is the real beachhead ‘sole traders in the trades,’ or ‘sole traders generally’? We’re about to aim all the marketing at one of them.”

Who to talk to: 6 trades sole traders who use Ledgerwise · 4 non-trades sole traders who use it · 4 trades sole traders who signed up and churned. (Fourteen on the list — but Sam stops when it stops surprising him.)

The guide (extract): “Walk me through how you handled your books before Ledgerwise.” · “Tell me about the last time tax season crept up on you — what happened?” · “What made you sign up the day you did?” · “If you could wave a magic wand, what would your books just... do on their own?” — and explicitly **not:** “would you recommend it,” “would you pay more,” “do you think feature X would help.”

The synthesis (the finding): the trades sub-segment turned out *not* to be special. What was special, across trades and non-trades alike: “works with their hands all day, never at a desk, books happen in the van or not at all.” That includes mobile hairdressers and dog-walkers too. **Decision it pointed at:** broaden the beachhead language from “trades” to “people who work with their hands all day” — and re-test the trades-community channel against one or two adjacent communities.

What would change my mind: if the next round of churned-user interviews says the *trades-specific* features were the draw, not the on-the-go thing — then it really is a trades wedge after all.

Edge cases — and when to go deeper

A few situations need more than the template:

- **You're pre-product.** You're researching the *problem* and the *current workaround*, not the product — the guide should be all “how do you handle this today,” “what have you tried,” “walk me through the last time it bit you,” with the product never mentioned. The moment you describe your idea, you've contaminated the answers.
- **You need numbers, not just stories.** Interviews tell you *why* and *what patterns exist* — they don't tell you *how many*. If you need to size a pattern (“how many sole traders actually do this?”), that's a survey, a different tool. Do the interviews first, though — they're how you write a survey that isn't useless:

→ WHEN YOU NEED TO GO DEEPER

Survey Design — Turn what you heard in interviews into a survey that sizes the patterns — without the leading-question traps that make most founder surveys useless.

n-access.co.uk/playbook/survey-design

- **The research keeps confirming what you already believed.** That might be true — or you might only be talking to people who'd agree. Before you trust it: did you deliberately seek out the person who'd disagree? If not, do another round with people whose answer would *hurt*.

What to read next

- **04 · Go-to-Market Plan** — research often re-decides the beach-head; this is where the new answer goes.
- **03 · Brand Positioning & Messaging** — the customer's own words for your positioning come straight out of these interviews.
- **12 · Hiring Briefs & Job Descriptions** — your team should be hearing customers, not just you; this is the discipline they should be running.

The Founder's Playbook

A library of short operator guides for founders building with AI — not prompt-pack content, an actual method. Each guide is free, each routes you to deeper blueprints when you need them, and each assumes one thing: that you've built your **Founder Context Block** (that's guide 01).

The Founder's Playbook · n-access.co.uk/playbook