

# Customer Conversations

**How to conduct insights research to  
help build better product and market  
strategy**

Disruptors Handbook #21

Commercial in Confidence



# Introduction

Customer conversations are one of the most direct and effective ways for businesses to uncover meaningful insights. Unlike surveys or analytics, conversations allow customers to express their thoughts, feelings, and experiences in their own words. And that provides context and depth that numbers alone can't capture.

Through dialogue, businesses can uncover not just what customers do, but why they do it, offering a clearer picture of their motivations, frustrations, and decision-making processes.

The practice of customer conversations as a research tool stems from qualitative research and ethnography. It's been popularised through design thinking methodologies, particularly by organisations such as IDEO and the Stanford d.school, which emphasise empathy and customer-centred innovation.







Engaging in customer conversations also helps businesses challenge assumptions. Many companies operate on internal beliefs about what customers want, but these are often outdated or inaccurate. Speaking directly with customers reveals blind spots and surfaces new opportunities that might otherwise be missed.

For example, a business may assume price is the main barrier, only to discover that ease of use or trust is a bigger concern. By listening carefully, businesses can prioritise solutions that genuinely matter to their customers.

Customer conversations strengthen relationships by showing that the business values customer input. When customers feel heard, they are more likely to trust the brand and remain loyal. These interactions can transform customers into advocates who appreciate being part of the development process.

Over time, this creates a virtuous cycle where ongoing conversations not only provide valuable insights but also build stronger connections that support growth and differentiation in competitive markets.

Customer conversations

# What makes a good customer conversation?

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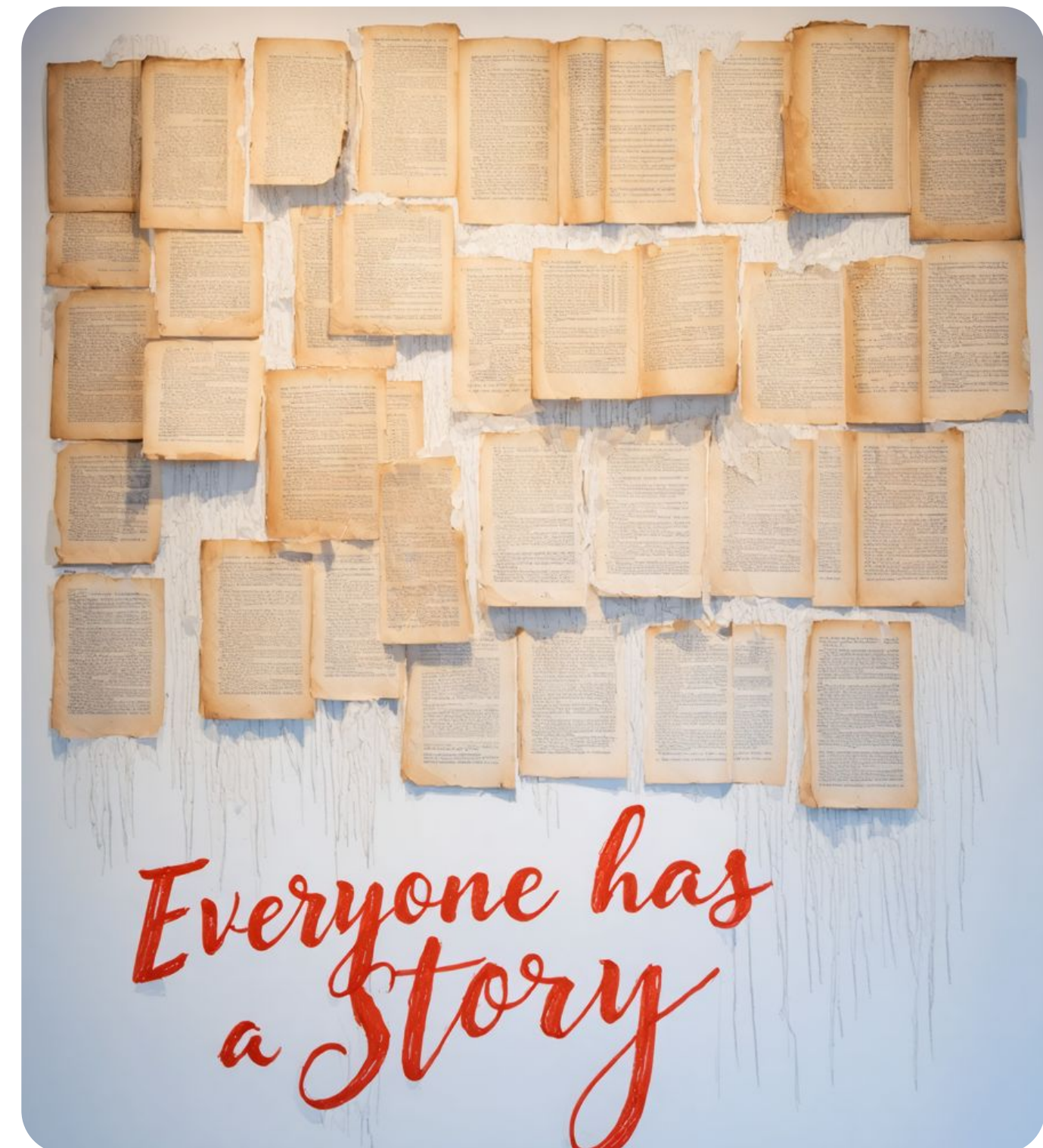


# What is discussed? What can you learn?

At the heart of any good customer conversation are stories. These might be past experiences of a product or service, or even adventure journeys where a customer tried to solve a problem for themselves.

These stories are especially valuable because they put a human face to the data. A story captures not just facts about what a customer did, but the emotions, context, and journey behind those actions.

These narratives are powerful for illustrating patterns and bringing abstract insights to life in a way that resonates with teams across the business. A single story can highlight systemic issues or opportunities that statistics alone may not make obvious, making it easier for decision-makers to empathise with customers and take action.



# Conversation Canvas

This conversation canvas is a useful template to prepare for customer conversations.

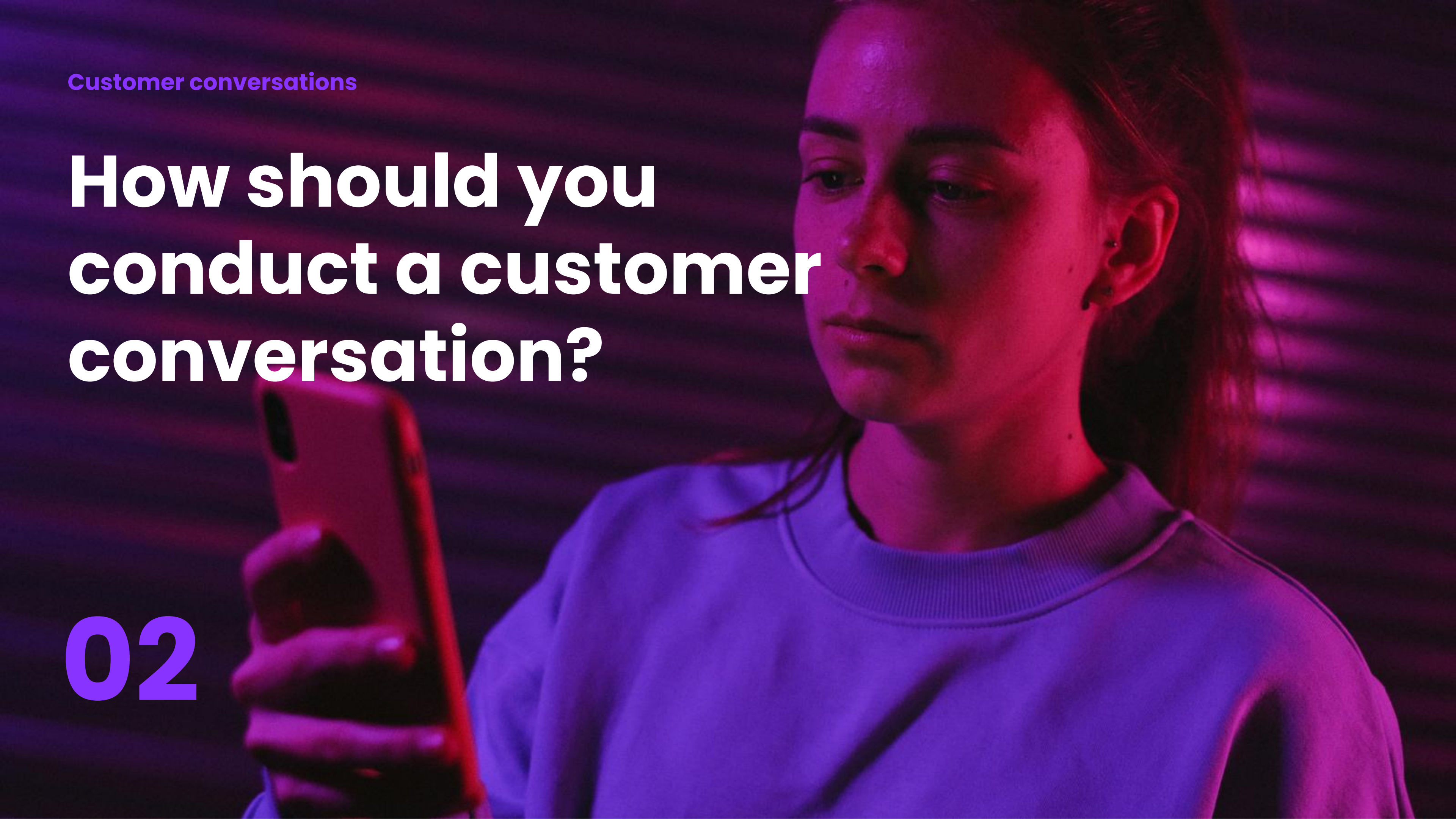
<b>OBJECTIVE</b> <i>Why are you having this conversation? For example, are you trying to explore unmet needs, test assumptions about behaviour, or understand reactions to a product or service?</i>	<b>KEY TOPICS</b> <i>What themes do you want to cover? These might include motivations, pain points, buying behaviours, or perceptions of your brand.</i>	<b>GUIDING QUESTIONS</b> <i>Use open-ended prompts that invite storytelling and deeper reflection. For example: "Tell me about the last time you did X". Avoid yes/no questions and instead encourage detailed answers.</i>
<b>CUSTOMER PROFILE</b> <i>Who are you speaking with? Note relevant demographic and behavioural details such as age, occupation, product usage, or customer segment.</i>	<b>INSIGHTS</b> <i>Key quotes, themes, or surprising patterns that emerge during or after the conversation.</i>	<b>NEXT STEPS</b> <i>How will he insights be used? This could be refining a persona, identifying opportunities for product improvement, or shaping a marketing message.</i>



Customer conversations

# How should you conduct a customer conversation?

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# 1. Connecting with ease

Begin the conversation by making the customer feel at ease. Explain who you are, why you are speaking with them, and reassure them that their input is valued and confidential.

This helps remove any sense of formality or pressure and frames the session as a relaxed dialogue rather than an interrogation. Without this step, customers may hold back or give rehearsed answers that lack depth.

Building rapport can be as simple as casual small talk before moving into the purpose of the discussion. Thank the customer for their time and acknowledge the importance of their perspective. By establishing trust upfront, you create an environment where customers are more likely to open up, share stories, and be honest about frustrations as well as positive experiences.





## 2. Make it easy for people to tell their stories

Once the customer feels comfortable, ease into the conversation with broad, open-ended questions.

Begin with topics that are easy and non-threatening, such as their general routines, how they usually approach a task, or their typical experiences in the area you are exploring. This allows the customer to find their voice and reduces the chance of overly simplistic or evasive answers.

The key here is to give customers control over the flow of the conversation. Instead of forcing them into your categories, let them describe their experiences in their own words. This often reveals unexpected insights, as customers highlight things you may not have thought to ask about.

And avoid jumping straight into specifics too early, as it can feel abrupt and limit the depth of insight.





### 3. Ask “why?”

As the conversation unfolds, begin to focus on the deeper drivers behind behaviour. Ask probing questions like, “Why did you choose that option?”, “What was the most frustrating part of that experience?”, or “What would have made it easier for you?”

These questions move beyond surface-level facts to uncover the emotions, needs, and obstacles that influence decisions.

When probing, use techniques such as the “five whys”, where you gently ask “why” multiple times to dig into root causes. Be patient with silences, as customers may need time to reflect before giving an answer.

The goal is to understand the underlying story, not just the immediate action. Done well, this stage uncovers the insights that most directly inform new opportunities for product and service improvements.





## 4. Dig deeper

Encourage the customer to share specific stories rather than abstract opinions. Ask them to walk you through “the last time” they did something, such as buying a product or using a service.

Stories provide concrete detail and highlight how events unfolded in reality, which is far more revealing than general statements like “I always prefer convenience.”

To support storytelling, use prompts such as “What happened next?” or “Can you describe how that made you feel?” Stories also surface the context around behaviour, including the setting, the alternatives they considered, and the emotions tied to the experience.

These details bring the customer journey to life and provide material that can be directly applied in product strategy or in forging new relationships.



## 5. Playback, thanks and referrals

As the conversation winds down, give the customer a chance to reflect. Play back to them what you have heard and ask a closing question such as, “Is there anything we haven’t discussed that you think is important?”. A good closing helps you capture anything that might have been missed in a customer story, and ensures the conversation feels complete.

Finally, thank the customer sincerely for their time and input. Let them know how their insights will be used and, if appropriate, offer to share outcomes in the future.

And always, always ask them to recommend anyone else you should be speaking with. This helps broaden your network, as well as showing respect to your customer. They are, after all, the experts in customer experience!





Customer conversations

# Tips to get the best value from Customer Conversations



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## Coffee can help!

Offer a drink if you are meeting face-to-face, or allow a few minutes for casual small talk before beginning. In these early moments, a coffee or an anecdote can help set the tone for the conversation.

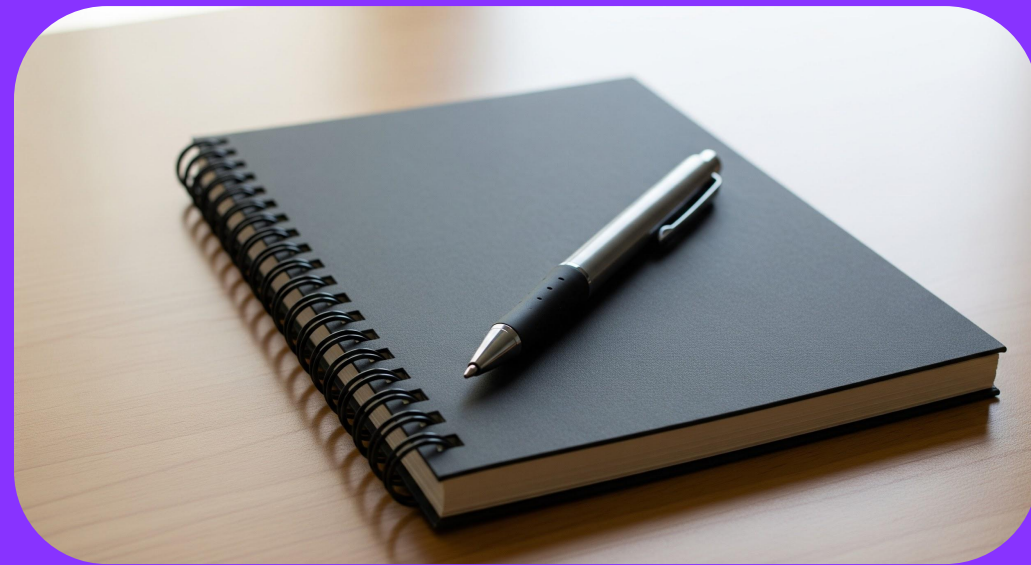
# Create a comfortable environment

The quality of insights you gather depends heavily on how comfortable the customer feels. If the environment feels formal or intimidating, customers are likely to give short, rehearsed, or surface-level answers.

A relaxed and open setting makes them more likely to share personal stories, frustrations, and honest opinions, which are the most valuable parts of any conversation.

To create this environment, start by setting a friendly tone. Explain clearly that there are no right or wrong answers, and reassure them that their views are confidential. If the conversation is in person, choose a neutral and welcoming space. If it is online, test your setup to avoid technical glitches that may cause frustration. The goal is to remove any barriers that might distract or unsettle the participant.





## Take notes to fill silences

Silence can be awkward, but if you fill any silent moments by taking notes, you are demonstrating the value of what has been said, while giving the customer space to think of new things to say. This can be a powerful way of triggering new insights.

# Listen actively and without bias

Many businesses waste customer conversations by listening only for confirmation of their own assumptions.

To get the best out of these conversations, you need to listen actively and resist the urge to filter responses through your expectations. True insights often come from surprises, contradictions, or details that challenge your current thinking.

Active listening means paying attention not just to words but to tone, pace, and body language. Show that you are engaged by paraphrasing (“So what I’m hearing is...”), nodding, or asking clarifying questions.

Avoid interrupting or rushing to the next question, as silences often give customers space to add something more valuable. Your role is not to lead the conversation, but to give it space to unfold.





## Uncover customer hacks

Stories about how customers have dealt with problems – and any solutions they hacked together to manage them – can provide evidence you can use to change your product experience.

# Focus on the past, not the future

One of the biggest mistakes in customer conversations is asking people what they would do, rather than what they have done.

People are often poor predictors of their own future behaviour because intention is influenced by optimism, social pressure, or the desire to give a “good” answer. In contrast, past behaviour shows what customers actually did in real contexts, which is much more reliable for building insights.

To put this into practice, ask customers to describe the last time they made a purchase or solved a problem, and get them to walk through the steps they took. Probe into details like what triggered the need, how they evaluated options, and what influenced the final decision.

By grounding the conversation in specific memories, you uncover patterns in real actions rather than hypothetical ones.





## Don't argue and don't show disbelief

Obvious signs of disagreement can close down stories. Even a raised eyebrow or smirk can make someone hold back. Neutral but engaged facial expressions help customers feel comfortable sharing even sensitive or critical feedback.

# Be aware of your body language

How you carry yourself during a customer conversation directly impacts the quality of the interaction. Poor body language, such as crossing arms, avoiding eye contact, or checking your phone, can make participants feel judged, rushed, or unimportant.

Conversely, open and attentive body language signals that you are genuinely listening, which encourages customers to open up and share more detail.

To demonstrate good body language, lean forward slightly, maintain natural eye contact, and keep your posture open. Nodding or offering small verbal affirmations (“I see”, “Go on”) shows engagement without interrupting.

Note taking is good, but don't do it too much while the customer is speaking. If you need to, record a meeting, or just take brief notes. You can use those silent moment to write more and encourage thoughtfulness.



## Manage your timing

Structure your questions so you can hit the key topics within the first 15 minutes. Treat any extra time as a bonus rather than a requirement. Closing on time with a thank you shows respect for the customer, and leaves the door open for future conversations. Keeping sessions tight ensures high energy, better focus, and more thoughtful responses.

# Stick to shorter conversations

The best customer conversations are concise and focused. Aim for 15–20 minutes as a baseline, which is long enough to cover your questions but short enough to respect the customer's schedule.

Overly long sessions can make participants tired, distracted, or impatient, leading to shallow answers. Shorter sessions force you to be disciplined and prioritise the most valuable questions.

That said, customers will sometimes become deeply engaged and want to keep talking. If this happens, let the conversation extend naturally, but only with their clear interest and consent. And remember – you can always ask for a second separate conversation if they are enjoying themselves.

A motivated customer sharing stories in detail can yield excellent insights, but the decision to go longer should always rest with them.



Customer conversations

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What's next?



# Insights synthesis

On average it will take more than 20 customer conversations before you can find patterns among different customer experiences, captured from conversations.

To find those patterns start by separating direct observations (what customers said and did) from your interpretations. This discipline ensures that the evidence remains intact and prevents personal bias from creeping in too early.

Once everything is gathered, look for repeated themes across conversations, such as common frustrations, motivations, or decision triggers. Patterns that emerge consistently across different customers are usually the most reliable signals for action.

Use clustering techniques, such as grouping quotes or sticky notes into categories, to make the insights more visual and digestible. Bringing colleagues into the synthesis process can be helpful, as different perspectives reduce the risk of narrow interpretations and ensure the findings resonate across the business.

**To learn more about clustering techniques, download the Disruptors Co [Problems Worth Solving handbook](#).**





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