

Customer Interview Template

A structured discussion guide for product and UX teams. Use this template to run consistent customer discovery, validation, and churn sessions.

TIP

You can either run this template session-by-session and bring recordings within Looppanel OR paste this as a discussion guide within your study on Looppanel directly which will be automatically used to auto-transcribe, tag themes with AI, and find patterns across participants.

This PDF is editable. Click any shaded field to type into it — the highlighted placeholders are yours to rewrite. Prefer pen and paper? Print it and write on the lines.

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SECTION 1 — SESSION DETAILS

Fill this in before the session starts.

Study Name

e.g. Customer Discovery Q3

Participant Name / ID

e.g. P1, P2 (keep anonymous)

Customer Segment

e.g. SMB, Enterprise, Churned

Date

Interviewer

Observer(s)

Session Length

e.g. 45 min

Recording?

Yes

No

Consent Obtained?

Yes

No

SECTION 2 — OPENING SCRIPT

Read this aloud at the start of every session. Keep it consistent across participants.

READ ALOUD

Hi [Name], thanks for making time today. My name is [Your Name] and I'm a [Your Role] at [Company]. This session will run about [X] minutes. I am here to understand [Enter your Research Goal]. I want to be upfront: I'm not testing you, I'm learning from you. There are no right or wrong answers. With your permission, I'd like to record this session so I can focus on the conversation instead of my notes. The recording will only be used internally and won't be shared outside the team. Are you okay with that? Any questions before we start?

03

SECTION 3 — WARM-UP QUESTIONS

2 to 3 minutes. Lower the stakes and get the participant talking before you hit core topics.

Q1

Can you tell me a little about your role and what you work on day-to-day?

NOTES

Q2

How long have you been doing [relevant activity]?

NOTES

SECTION 4 — CORE RESEARCH QUESTIONS

The main body of the session. Aim for 5 to 8 questions. Edit these to fit your study goal.

Q3

**Walk me through how you currently handle
[the problem or task you're researching].**

FOLLOW-UP PROBES:

- What triggered that process?
- What were you trying to accomplish?
- What happened next?

NOTES

Q4

What's the hardest part of [task or process] for you right now?

FOLLOW-UP PROBES:

- How often does that happen?
- How do you currently work around it?
- What does that cost you — time, effort, confidence?

NOTES

Q5

What have you tried before to solve this? How did that go?

FOLLOW-UP PROBES:

- Why didn't it work?
- What were you hoping it would do?

NOTES

Q6

What made you choose [product / solution] in the first place?

FOLLOW-UP PROBES:

- What almost stopped you?
- What were you comparing it against?

NOTES

Q7

If you could change one thing about how you [task or process] today, what would it be?

FOLLOW-UP PROBES:

- Why that specifically?
- What would that make possible?

NOTES

Add your own questions here. Replace or remove any that don't fit your study. Keep questions open-ended — start with **"walk me through"**, **"tell me about"**, or **"how do you"**.

05

SECTION 5 — CLOSING

5 minutes. Give the participant space to add anything, and close cleanly.

Q8

Is there anything we didn't cover that you think is important for me to understand?

NOTES

Q9

Do you know anyone else who deals with [topic] and might be open to a conversation?

NOTES

READ ALOUD

Thank you — this was really helpful. I appreciate you taking the time. We'll use what we learned today to improve [product / experience / process]. We'll follow up with [next steps if applicable]. Have a great rest of your day.

SECTION 6 — POST-SESSION NOTES

Fill this in within 10 minutes of the session ending, while it's still fresh if you're not using Looppanel or else within Looppanel post the video is analysed, all this will be pulled out within minutes!

Top 3 observations

What stood out most?

Best quote

Exact words if possible

Surprises

What didn't you expect?

Follow-up needed?

Any gaps to probe in the next session?

Overall sentiment

Frustrated

Neutral

Positive

Timestamp flags

e.g. 4:20, 12:05, 31:44 — moments to revisit



 Looppanel

You ran the session. Now skip the grunt work.

Bring the recording into Looppanel to auto-transcribe it, tag themes with AI, and find patterns across participants — in minutes, not weekends.

[Try Looppanel free](#)