

Call prep template

Fifteen minutes with this before a call is worth more than an hour of hoping it goes well. Print it and write by hand, or fill it in on screen.

The call

Basics

WHO I'M TALKING TO (ROLE, NOT NAME)

DATE AND LENGTH

CALL TYPE

Product discovery

Usability

Focus group

Concept test

PERMISSION TO RECORD?

Asked

Yes

No, notes only

1 • My goal

One question about their world, not a feature. "How do they currently decide which client to call first?" is a goal. "Get them to like our dashboard" is not.

BY THE END OF THIS CALL I WANT TO UNDERSTAND...

2 • What I think I know

Write down what you believe is true but haven't checked. Then decide how you'd notice if you were wrong. This is what stops you from hearing only what you expected.

I BELIEVE...

I'D KNOW I'M WRONG IF THEY SAID...

3 • My five open questions

Start each with a story prompt, then run the 4-part test: does it hold the answer, hint at one, allow yes/no, or ask about the future?

Tell me about the last time...

Walk me through...

What happened next?

How did you decide?

What else did you try?

- 1

- 2

- 3

- 4

- 5

Keep these handy

Page two is for the call itself, and for the ten minutes after it.

Neutral follow-ups

Use freely

None of these contain an opinion, an answer, or a hint. Use them as often as you like.

"Tell me more about that."	After any answer that made you curious
"What happened next?"	When the story stops early
"Can you give me an example?"	When you hear "always" or "usually"
"How did you handle that?"	When they describe a problem
"What made you decide that?"	When they describe a choice
"What did you try before?"	When they mention a workaround
"Who else was involved?"	When you're mapping how work really happens
"What was going through your mind?"	When they hesitate or go quiet
"What should I have asked that I didn't?"	The last question of the call

Phrases I want to avoid

Watch for these

Wouldn't you agree...

Don't you think...

Would you use...

How much do you love...

Most people find...

So the real problem is...

Is it easy/clear/useful?

MY OWN HABITS TO WATCH (WHAT DO I TEND TO SAY?)

If you slip: "Let me rephrase that. I don't want to put words in your mouth."

Ideas I'll show last

If you plan to show a concept, prototype, or price, write the moment you'll reveal it, and what you'll ask *before* you explain it.

I'LL SHOW...

FIRST REACTION QUESTION (BEFORE I EXPLAIN ANYTHING)

Right after the call

10 minutes

3 THINGS THEY ACTUALLY SAID

3 THINGS I ASSUMED OR FILLED IN

WHAT SURPRISED ME

MOMENTS I LED OR TALKED TOO LONG

ONE THING I'LL DO DIFFERENTLY NEXT CALL
