

SaaS Case Study Interview Template

A fill-in template for structuring customer interviews — companion to *How to Write a SaaS Case Study: A Step-by-Step Guide*

Interview Details

Customer / Company:

Interviewee Name & Title:

Interview Date:

Interviewer:

Case study goal (from Step 1):

How to Use This Bank

- ☐ Select 6 to 10 questions across categories before the call — trying to ask all 30 in one sitting runs long and tires out the interviewee.
- ☐ Send 2 to 3 questions in advance, particularly from the Measurable Results section, so the customer can pull specific numbers before the call instead of guessing live.
- ☐ Leave the note boxes blank until the interview, and write down direct quotes as close to word-for-word as possible — the exact phrasing is often more useful than a paraphrase.
- ☐ After the interview, circle or star the single best quote and the single best statistic. These usually become the pull-quote and the headline result in the finished case study.

Quick-Start Set (8 Questions for a 20-30 Minute Interview)

Use this shortlist when time is limited. One question is pulled from each category below, covering the full arc from challenge to advocacy.

- ☐ What was happening in your business that made you start looking for a solution like this?

- ☐ What other options did you look at, and what made you choose this one?
- ☐ What did the first month with the product actually look like?
- ☐ Which specific feature has mattered most, and why?
- ☐ What's changed in your numbers since you started, and can you put a percentage or dollar figure on it?
- ☐ Has this freed up your team to focus on anything else?
- ☐ What would you tell another company in your position who's considering this?
- ☐ Would you be comfortable if we quoted you directly? Is there anything you'd want kept anonymous?

Full Question Bank

A. Before the Product — The Challenge

Establishes the starting point the reader needs to recognize their own situation in.

1. What was happening in your business that made you start looking for a solution like this?

Notes / direct quotes:

2. What were you using before, if anything — a spreadsheet, another tool, or a manual process?

Notes / direct quotes:

3. What was the specific moment or event that pushed this from "nice to have" to "we need to fix this now"?

Notes / direct quotes:

4. How was this problem affecting your team's time, budget, or ability to hit its goals?

Notes / direct quotes:

5. If you had to guess, what would it have cost you to leave this problem unsolved for another year?

Notes / direct quotes:

B. The Decision Process

Shows the reader how a similar buyer evaluated options and reached a decision.

6. What other options did you look at, and what made you rule them out?

Notes / direct quotes:

7. Who else was involved in the decision, and what did each person care about most?

Notes / direct quotes:

8. What almost stopped you from moving forward?

Notes / direct quotes:

9. What made you finally choose this product over the alternatives?

Notes / direct quotes:

10. How long did the whole evaluation process take, from first look to signed contract?

Notes / direct quotes:

C. Implementation & Onboarding

Covers what it actually took to get up and running — useful for setting expectations with new prospects.

11. What did the first week or month with the product actually look like?

Notes / direct quotes:

12. Was there anything that surprised you, good or bad, during setup?

Notes / direct quotes:

13. How long did it take before your team felt fully up and running?

Notes / direct quotes:

14. Who on your team owns the product day to day now?

Notes / direct quotes:

D. Day-to-Day Usage

Grounds the case study in specific, concrete usage rather than general praise.

15. Walk me through how your team uses this on a normal day or week.

Notes / direct quotes:

16. Which specific feature has mattered most, and why?

Notes / direct quotes:

17. Is there a feature you didn't expect to use much that turned out to be important?

Notes / direct quotes:

18. What would your team say if we took this away tomorrow?

Notes / direct quotes:

E. Measurable Results

The core of the case study — push for a specific number wherever possible, even if it's a range.

19. What's changed in your numbers since you started — revenue, cost, time, ticket volume, churn, or anything else trackable?

Notes / direct quotes:

20. Can you put a percentage or dollar figure on that change?

Notes / direct quotes:

21. How are you measuring that, and over what time period?

Notes / direct quotes:

22. Is there a metric your finance or leadership team specifically watches that's improved?

Notes / direct quotes:

23. What would that number likely look like today if you hadn't made this change?

Notes / direct quotes:

F. Qualitative & Team Impact

Captures the human side of the result, which written numbers alone don't convey.

24. How has this changed how your team feels about this part of the job?

Notes / direct quotes:

25. Has it freed anyone up to focus on something else? What are they doing instead?

Notes / direct quotes:

26. Has this changed how you talk to your own customers or stakeholders?

Notes / direct quotes:

G. Advice & Advocacy (Closing Questions)

Wraps the interview with quotable, forward-looking material for the conclusion and approval step.

27. What would you tell another company in your position who's considering this?

Notes / direct quotes:

28. Is there anything you wish you'd known before you started?

Notes / direct quotes:

29. On a scale of 0 to 10, how likely are you to recommend this to a peer — and why that number?

Notes / direct quotes:

30. Would you be comfortable if we quoted you directly on a specific number or statement? Is there anything you'd want kept anonymous?

Notes / direct quotes:

Post-Interview Wrap-Up

Complete this section within 24 hours of the interview, while the conversation is still fresh.

Best quote for the pull-quote:

Best statistic for the headline result:

One-sentence summary of the story:

Follow-up / approval contact:

Target publish date:

