For Interviewing Your Sales Leader

Purpose

Sometimes the bigger trends are easier to see from the top. Tap into the expertise of your sales leaders to identify where customer evidence might be falling short and how it's affecting team success and deal momentum. Use this template to uncover leadership's big-picture insights and pair those insights with that you learned from interviewing your on-the-ground sales team members. Find the common threads, and you'll nail The Evidence Gap within your organization.

Interview Details

Who You're Interviewing :

Role :

Date :

Question Bank

Team Performance and Challenges

- Where do you see the biggest challenges for your sales team in advancing deals?

- Are there consistent points in the sales cycle where deals tend to stall?

- Are there specific personas, industries, or regions where your team struggles to gain traction?

Notes :

Evidence Needs for Sales Success

- Are there critical objections or hesitations from buyers that your team struggles to overcome?

- What types of customer evidence (e.g., (case studies, customer stories, ROI data, etc.)) would be most impactful for your team?

- Are there specific deal stages (e.g., consideration, purchase) where evidence could make the biggest difference?

Notes :

Competitive Landscape

- Which competitors are your team encountering most often, and what's giving them the edge?

- How well-equipped is your team to handle competitive objections?

- Are there any specific competitive advantages we need stronger proof points to counter?

Notes :

Enablement and Training

- Are there any gaps in how customer evidence is distributed or used by your team?

- Are there opportunities to improve how your team is trained to use customer stories in sales conversations?

- What format or delivery method for customer evidence (e.g., slides, one-pagers, video testimonials) would work best for your team?

Notes :

Strategic Initiatives

- Are there upcoming initiatives, such as new market entries or product launches, that will require additional customer evidence?

- How do you see customer evidence aligning with your overall revenue strategy for the year?

- Are there specific metrics or KPIs where you feel customer evidence could help drive improvement?

Notes :

Actionable Insights

Use this section to summarize recurring patterns or key takeaways from the interview.

Observed Patterns:

Notes :

Top Evidence Gaps Identified:

■ What customer evidence could help our team move deals to close more quickly?

1.

2.

3.

Next Steps
Turn the gaps identified into actionable plans. Use the following structure:

Example:

- **Pattern:** Deals often stall during late-stage negotiations with enterprise buyers.

- **Gap Statement:** We lack ROI calculators or financial proof points to validate the value of our solution.

- **Action:** Develop an ROI toolkit tailored to enterprise accounts to support negotiations.

Your Plan:

Pattern:

Gap Statement:

Action:

Final Notes
Wrap up the insights from your interviews to uncover the bigger themes and pinpoint where stronger customer evidence can make the most impact. Use these takeaways to prioritize what to create and how to put it to work for the best results.

For Interviewing Your
Sales Team (AEs/SDRs)

Purpose

Is your sales team fully equipped with the proof points to close deals–fast? This interview template helps you pinpoint critical gaps in your customer evidence library by tapping into the experiences and insights of your sales team. Use it to guide your interviews, uncover actionable opportunities, and build an evidence strategy that clears the path to quicker wins. Extra tip for this one: lead with humility. If someone mentions a gap that you don't believe exists, lean in with extra curiosity. "Where do you feel that gap the most? What sort of content do you wish existed?" Defensiveness = the perfect way to shut an interview down.

Interview Details

Who You're Interviewing   :

Role   :

Date   :

Question Bank

Sales Funnel Insights

- Where do you see the biggest drop-offs in the sales funnel? (And any hunch as to why?)

- Which persona is hardest to move through the funnel?

- Which industry is hardest to move through the funnel?

- What types of customer evidence (case studies, customer stories, ROI data, etc.) would help at different stages (awareness, consideration, purchase)?

Notes :

Competitive Landscape

- Which competitors are we losing to most often, and why?

- Are there specific competitive advantages they emphasize that you don't feel equipped to sell against?

Notes :

Buyer Objections

- What are the most common objections you hear from prospects?

- How do you currently address these objections? Do you have the resources you need?

Notes :

Customer Success Stories

- Are there specific industries or use cases where we lack compelling customer stories?

- What's a recent deal where customer evidence (a case study, testimonial, ROI stat) made a big difference? What kind of evidence was it?

Notes :

Personal "Aha!" Moments

- What's a common "aha!" moment that helps buyers see the value of our product? Where do you most often see the lightbulb in their head go off?

Notes :

Observed Patterns:

■ What are some things I heard over and over again?

Notes :

Top Evidence Gaps Identified:

■ What customer evidence could help our team move deals to close more quickly?

1.

2.

3.

Next Steps
Turn the gaps identified into actionable plans. Use the following structure:

Example:

- **Pattern:** Buyers in the cybersecurity industry are skeptical of our value.

- **Gap Statement:** We lack case studies for the cybersecurity vertical.

- **Action:** Send a survey to all of our existing cybersecurity customers to gather ROI data, and prioritize creating a cybersecurity case study.

Your Plan:

Pattern:

Gap Statement:

Action:

Final Notes
Wrap up the insights from your interviews to uncover the bigger themes and pinpoint where stronger customer evidence can make the most impact. Use these takeaways to prioritize what to create and how to put it to work for the best results.

For Interviewing Your
Marketing Leader

Purpose

It's time to fuel more of your marketing engine with customer evidence (trust us, this is the stuff that will earn you a promotion). Use this template to dig into the gaps with your CMO and figure out where the biggest opportunities are. It'll help you focus your advocacy efforts, prioritize gathering the proof that matters most, and make sure your marketing initiatives are powered by customer stories that actually stick.

Interview Details

Who You're Interviewing :

Role :

Date :

Question Bank

Strategic Marketing Goals

- What are the top marketing priorities for this quarter and year?
- Which buyer personas or industries are we targeting most aggressively?
- Are there any new markets or regions we are planning to expand into?

Notes :

Messaging and Positioning

- Do you feel our current messaging resonates with decision-makers at all levels?

- Are there any specific personas (e.g., C-suite, IT, finance) that need stronger tailored messaging?

- How confident are you that our customer evidence (case studies, customer stories, ROI data, etc.) reinforces our value proposition effectively?

Notes :

Competitive Dynamics

- Which competitors pose the biggest challenge in our key markets?

- What are their perceived strengths, and how do we counteract them?

- Do we have enough customer evidence to illustrate our differentiation against competitors?

Notes :

Evidence Gaps

- Are there specific industries or verticals where we lack strong proof points?

- Are there any customer stories or use cases you wish we had, but don't?

- Is there customer data you wish we had, but don't?

- How well does our current customer evidence address objections or hesitations from buyers?

Notes :

Content Utilization

- Which types of customer evidence (e.g., case studies, testimonials, ROI data) have the most impact on campaigns?

- Are there any existing assets you feel are underutilized or need updating?

- How do you envision customer evidence playing a role in supporting your broader campaigns (e.g., thought leadership, ABM)?

Notes :

Future Trends

- Are there emerging trends in the market that we should address with new customer stories?

- Are there any upcoming product launches or strategic initiatives that will require supporting evidence?

- How can customer evidence help position us as a thought leader in our industry?

Notes :

Actionable Insights
Use this section to summarize recurring patterns or key takeaways from the interview.

Observed Patterns:

Notes :

Top Evidence Gaps Identified:

- What customer evidence could help our team move deals to close more quickly?

> 1.

> 2.

> 3.

Next Steps

Turn the gaps identified into actionable plans. Use the following structure:

Example:

- **Pattern:** Messaging for C-suite buyers in financial services feels underdeveloped.

- **Gap Statement:** We lack solid ROI-backed data that specifically address the CFO's concerns.

- **Action:** Develop a financial services customer evidence microsite filled with ROI data and cost savings stories from other financial services C-suite customers.

Your Plan:

> Pattern:

Gap Statement:

Action:

Final Notes

Wrap up the insights from your interviews to uncover the bigger themes and pinpoint where stronger customer evidence can make the most impact. Use these takeaways to prioritize what to create and how to put it to work for the best results.