Assessing Customer Needs: Visiting and Interviewing

A guide to use with the Customer Needs Assessment template tutorial

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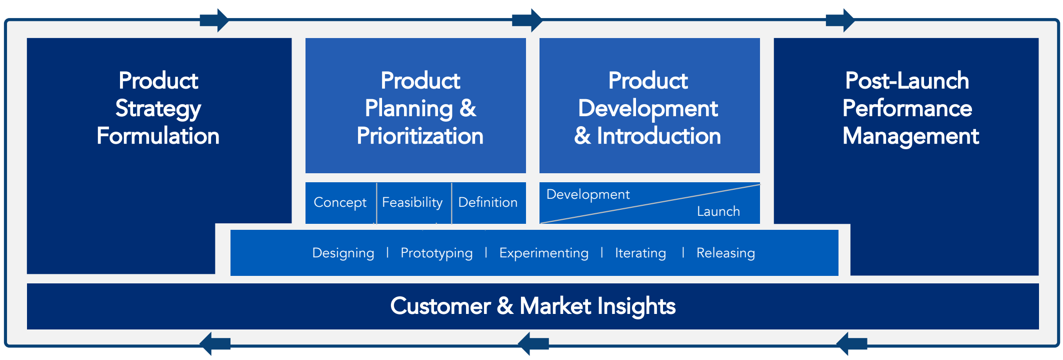
Assessing Customer Needs

The purpose of this template, and the accompanying tutorial video, is to provide you with tools to learn how to gain access to customers so you can arrange and conduct visits, and, to provide guidelines for effective interviewing. This is important because garnered customer insights are needed to drive your product strategy and maintain competitive advantage. In the Product Management Life Cycle Model, shown below, you'll note the importance of Customer & Market Insights that forms the foundation of a product's life, and by association, why the assessment of customer needs is so important.



It's pretty simple. If you don't know who your intended customer is and what motivates them to buy your product at the time the need is present, you'll probably not make the sale. Your job is to learn who your customers are, what they're trying to do specific time, determine if there's an issue, and come up with a solution. Simple enough. Yet sometimes, product failure rates are higher than they should be, and more effort is required.

In the world of tangible products, mobile applications, and software as a service, there are many opportunities to take customer snapshots in rapid succession. Such snapshots reveal helpful insights into why customers buy certain products and how they use those products.

What a customer or user needs, or more succinctly, *what a customer needs to do* at a given time can change in a heartbeat. Product managers, as business strategists, need to harness a sufficient feed of data and pivot in a way that allows for their products to fill those needs.

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Whether your products target consumers or serve people who work in businesses, product managers have to ask, "Who is the person who *needs to do something* at a given time?"   From another standpoint, you might want to ask 'who currently buys or uses our products?" The next logical question might be, "who do we want to pursue and add to our customer base – and why

The "why" is a significant question. The answers will help you and your team to understand the overarching problems or needs of specific customer types. What determines a customer's motivation to actually buy or use your products? The stronger your commitment to understanding and acting on what a customer needs to do, the better your chances for meeting or exceeding their expectations.

While there are numerous techniques and methods used to understand customer needs, this template, and the associated video tutorial will contribute with two techniques:

1. How to plan and carry out customer visits so that you can observe customers and discern implicit needs
2. How to conduct plan and conduct customer interviews

With this, the ultimate goal is to be able to tell stories about customers that characterize what they need to do, at the time a need is present, so that what's created has the best chance of meeting that need.

To begin, you want to make sure you can identify the customer target - a person, or person-type (e.g., persona) - so that you can aim to fill in the following template:

> I am a __________________________ and I need to do ____________________
> when ____________________________....

With this statement, you're setting yourself (you and your team) to walk in the customer's shoes, and see things through a customer's eyes.   Now, let's take a look at what a "customer narrative" might look like:

"I'm a working mother with two toddlers and my husband travels a lot. I can't worry about shopping and preparing dinner every night, so when I pick up the kids at child care, I need to have a healthy dinner, ready to serve within 15 minutes after I get home."

Assessing Customer Needs: Customer Goals

To improve your team's ability to capture customer needs, it's incumbent for the team to be able to "see" what the customer needs to do through a goal or outcome he customer wants to achieve. Using SMART goal setting, use the template below to prepare to see through the customer's eyes.

Goal building specifics	Using customer language…
Specific	I need to do something
Measurable	I'll know when I've achieved the outcome because…
Achievable or Attainable	Because I know the steps I have to follow, I can achieve my goal or produce an outcome.
Relevant	Of all the things I need to do, this carries substantial weight. Here's why…
Time Bound	I need to do something by a certain time or within a given time frame.

Assessing Customer Needs: Visits

With our eyes on the end-goal, to create a customer narrative, we have to see or talk to customers in the environment in which they "do what they do."

First, we have to plan a customer visit. In a typical B2B setting, customers may operate in a variety of environments. These might include: a factory, a call center, an operations center, a department in a company, or anywhere these "customer types" do their work.

Now, you don't usually have carte blanche rights with your "customer companies." You have to deploy some diplomacy, plus, secure some internal permissions. One way to do this is to prepare a Customer Visit Plan to share with your management as well as those in the field (sales, account management, etc.). The Customer Visit Template that is shown below:

Visit Plan Item	Additional Information
Objective / Purpose	Why is the visit being planned? What do you want to learn?
Which customer(s) will participate?	Identify target customers by name, role, etc.
Guidelines	Voice or video recording, picture taking, etc. Any rules or non-disclosures to sign?
Agenda	How will the visit be structured? Presentations? Tours? Interviews? Demos?
Team members who will attend?	Names, roles, etc. Product manager, developer, designer, marketing?
How will visit information be captured?	Who will capture notes and observations?
Debrief	Capture all notes and observations of what's learned and prepare for internal review

Assessing Customer Needs: Interviews

If your customer visit includes interview time – or – if you're just conducting routine interviews to learn about goings-on in the customer's world, you must make sure your interviewing skills are finely tuned.

Tying interviews to visits adds immeasurable value to your insights into customer needs and motivations. For example, if your team is observing a process being carried out, someone should be able to sketch out work flows, hand-offs, and other pertinent information to discern where pain points might emerge – and when these are understood, or as you seek clarification, you should be able to ask open-ended questions. As included in the video tutorial, some open ended questions were posed. They included:

1. *"How do you start your day when you get to work?*
2. *"When you launch the the app, what do you expect to see?*
3. *"What does the app help you to do?"*
4. *"Oh, my! When the app crashed, what did you do?"*
5. *"Really, so when you got interrupted, you lost all the work you did?"*
6. *"When you reached out to us, what happened?"*
7. *"When you called tech support, you waited for an hour to speak to someone? How did that feel?"*

While it's not always possible to script or plan out your questions, you may find that you can build a "library" of questions that you learn to ask as you become more experienced. Also, note that different customer types (users, influencers, etc.) may have different standpoints. User oriented questions might be easier. However, a user's manager may have different perspectives, so you'll want to get to know these people and find out the kinds of things that interests them. For example:

1. *"When your employee didn't get that work done on time, what impact did it have?"*
2. *"What kinds of metrics are you responsible for?"*
3. *"What hasn't happened that you think should happen?"*
4. *"What are people in your not doing that they should?"*

One last point about interviewing. As humans, we tend to pay attention to points that uphold what we believe is true or what we value. This *confirmation bias* can be a trap for product managers and their teams who ask questions of customers about features that they themselves like and believe in. Let's say you're working on some new features, and you think they're incredibly powerful for your customers. In this case, you may ask customers only their opinions about those features, then filter their answers so they fit your own expectations.

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