How to Conduct Good Customer Visits:  
16 Tips from Ed McQuarrie

Distributed in conjunction with MRT’s new online training course:  
Getting the Voice of the Customer Right - Mastering the Art of Customer Visits

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LISTENING TO THE VOICE OF THE CUSTOMER
April 14-15, 2015 – Boston, MA

Why do people call this the best training they’ve been to in 10 years? Sign up and find out for yourself.

Join Applied Marketing Science (AMS) for the next offering of “Listening to the Voice of the Customer,” our acclaimed training workshop, on April 14-15, 2015 in Boston, Massachusetts.

Led by veteran product development and market research expert, Gerry Katz, this course will introduce Voice of the Customer (VOC) market research and teach you to use VOC to accelerate innovation in both consumer and business-to-business markets. Delivered in a lively, interactive format with numerous hands-on activities, topics include how to:

- Scope an effective study
- Choose the right customers to interview
- Structure and ask the right questions
- Analyze customer interviews to extract customer needs
- Use quantitative methodologies to prioritize needs for product development

Space is limited and the course often sells out. To reserve your place in the session today visit www.ams-inc.com/innovation/training or call Holly Senykoff at (781) 250-6332.

WHO SHOULD ATTEND

This course is especially useful for product developers, engineers, marketers, and managers who are responsible for product, service, and customer experience innovation in companies both large and small. Past attendees have included representatives from:

- Kimberly-Clark Healthcare
- Intel Corporation
- Caterpillar
- PPG
- Boston Scientific
- General Electric
- John Deere
- Johnson & Johnson
- S.C. Johnson & Son
- Bosch
- Baker Hughes
- Masco
- Blue Cross Blue Shield
- Covidien
- Cisco
- Walmart
- Whirlpool
- Qualcomm

WHAT ATTENDEES ARE SAYING:

“Best course I have ever seen in 10 years of marketing.”

Vice President of R&D, Li-Cor Biosciences

“Excellent. I have taken so many courses that turned out not to be worthwhile; this was one of the very few that was worthwhile.”

Product Manager, Milwaukee Electric Tool Co.

“A good balance between theory and the real world.”

ChoicePoint, Inc.

“Our instructor was interesting, comfortable, knowledgeable—excellent job!”

Caterpillar, Inc.

www.ams-inc.com
COURSE OUTLINE

Day 1

Course Overview and Introduction to VOC
- Why you should listen to customers
- How Voice of the Customer drives product development and innovation
- How to apply Voice of the Customer in your business

Designing the Interview Process
- Whom to interview
- Interview formats: in-depth interviews, ethnography, focus groups, IDI’s
- Interview logistics: recruitment, facilities, technology
- Writing an interview guide

How to Interview Customers
- Active listening
- Role-playing and critiquing

Day 2

Analyzing Customer Interviews
- Extracting insights from interviews
- Needs, solutions, target values, and opinions

Organizing and Prioritizing What Customers Say
- Building an affinity diagram of needs
- Assessing importance and performance

Translating the Voice of the Customer into New Products, Services, and Specifications
- Brainstorming
- Specification setting
- Concept testing
- Conjoint analysis

PRICING

Tuition for the course is $1,795 per participant, which includes all course materials, as well as breakfast and lunch on both days. Participants who register before February 27th will get a $200 discount on regular rates. Companies who register three or more participants will get an additional $100 discount on both regular and early-bird rates.

ABOUT THE VENUE

Located just four miles from Boston Logan International Airport, the Sheraton Boston Hotel provides a welcoming retreat for leisure and business travelers alike with new deluxe guestrooms, a new restaurant and a new full-service luxury spa. The hotel is conveniently located within walking distance of many of Boston’s best spots for shopping, dining and site-seeing.

A limited number of hotel rooms are available for participants at the discounted rate of $279 per night, for April 13th and 14th only. To make your room reservation or for questions about guest accommodations, please contact the Sheraton Boston Hotel reservation line at (800) 325-3535 or visit their website at https://www.starwoodmeeting.com/Book/marketingscience.

ABOUT APPLIED MARKETING SCIENCE

For 25 years, Applied Marketing Science (AMS) has been the authority on turning customer insights into innovation. Co-founded in 1989 by Dr. John Hauser, Kirin Professor of Marketing at the Massachusetts Institute of Technology and co-author of the landmark paper, “The Voice of the Customer,” AMS has helped professionals at hundreds of global companies apply the Voice of the Customer and other techniques to create innovative products and distinctive customer experiences. To learn more, visit www.ams-inc.com or call us at (781) 250-6300.
HOW TO CONDUCT GOOD CUSTOMER VISITS

When Bose Corporation’s engineers were preparing to work on their home theater concept, they sought expert advice from Santa Clara University marketing professor Edward McQuarrie, author of Customer Visits: Building a Better Market Focus.

According to McQuarrie, if you want to be a market leader today, you’d better make regular, carefully structured customer visits standard practice. But be careful not to expect a customer visit program to give you hard data. It’s not designed for that. What it does do is give you access to a rich lode of vivid and credible insights into your customer’s business situation that can clarify your product definition process. Here are some of his best practices for a good customer visit program:

Preparing for the visit

1. Send an advance letter of confirmation – with an agenda – so your customer knows why you’re coming and can prepare.

2. Send small cross-functional teams. Two is enough – provided critical perspectives are represented. If design is a key issue, for example, be sure to send a design engineer. Insist that people commit to at least four visits – nothing is worse, says McQuarrie, than a senior person who makes a token visit then decides he or she is an expert.

3. Select customers according to a plan and visit at least a dozen. For most purposes, 30 is the maximum. You might want to push that to 45 if you’re including overseas visits. And if a large part of your business is overseas, it’s a mistake not to do overseas visits.

4. Don’t keep going back to the same small group of favorite customers. You’ll end up with terrific loyalty in a shrinking market. Talk to people who’ve left you. Talk to your competition’s customers.

5. Interview people at each site who represent each stage of the purchasing decision.

6. Get support from local account management. Neglect to do it, and you might end up getting shunted to disgruntled customers, just to send you a message.

Conducting the Visit

7. Use a two-to-three page discussion guide in outline form. Three big no-nos: showing up and talking about whatever comes up, pulling out a questionnaire that you’ve worked out in advance, and starting with a presentation and then going with the flow.

8. Assign roles to team members. Let one person serve as moderator, another as listener and note taker.
9. Use open-ended questions. Closed-ended questions – those that call for yes/no or multiple-choice answers – are the mark of a rank amateur. You are after information that will surprise you – and them.

10. Don't ask customers to give solutions – get them to identify problems. Stifle your desire to talk about your product. Go for what interests them: their tasks, their business situation, their goals and plans. This is where you get the clues you need.

11. Don't talk too much and don't show off your expertise. Basic rule of thumb: let the customer do 75% of the talking.

12. Probe deeper. McQuarrie says the number one mistake of beginners is the failure to ask follow up questions. Often it's on the fourth or fifth round that the amazing insights begin to pop up.

After the visit

13. Debrief immediately. You will be amazed at the cross-pollination that will emerge.

14. Highlight verbatim quotes in reports. Remember, customer visits are not good places to go for quantitative information. What you are after is a sense of the customer's world. It's a trip to another planet, says McQuarrie.

15. Every team should draft a report, organized by theme. Nothing more useless than a blow-by-blow narrative of each visit. Go for an overall report that emphasizes the big news and underlying themes. Remember to include an explanation of your methods.

16. Archive trip reports on-line with other marketing intelligence. One of the BIG challenges is building institutional memory so that you can share and leverage what you learn. The old hard copy report approach is a near-total waste. KS