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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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 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