

Getting the Voice of the Customer Right: Mastering the Art of Customer Visits

DECEMBER 3-4, 2008 • SAN DIEGO, CA

10 Key Benefits:

By attending this seminar, you will learn:

- 1 When to do customer visits, when to do focus groups, and when it's better to engage in some other kind of market research entirely
- 2 What it takes to gain organizational buy-in and how to do it
- 3 How to calculate how many customers, across which segments, you need to visit in order to collect actionable data
- 4 The importance of assembling a cross-functional team to conduct customer visits and how to prepare these teams to succeed
- 5 How to design a discussion guide to maximize the effectiveness of a series of customer visits – know what topics to include and how to sequence them
- 6 What customers can tell you (and what they can't) – learn how to construct questions that uncover real insights
- 7 How to assess the economic value of a proposed solution in the eyes of the customer
- 8 That customer visits can serve dual purposes, both to gather customer input and build relationships
- 9 Interview techniques that will help you identify needs that customers cannot vocalize – and know when and how to probe further
- 10 Analytical tools for linking the Voice of the Customer to product design and key business decisions

The Management Roundtable

Management Roundtable is the leading knowledge and networking resource for product developers. Practitioner-oriented and unbiased, our focus is on providing actionable information about new innovations, processes, tools, and technologies that enable faster time to market, increased profitability, and overall competitive advantage.

Founded in 1980, Management Roundtable publishes newsletters, hosts a variety of specialized conferences, workshops, and audio-sessions and conducts onsite training. Its premium web-based service, Knowledge Roundtable, was launched in 2004 to advance product development, innovation and collaboration. This service offers continuous, unlimited access to competitive insights and facilitates introductions among industry practitioners for benchmarking and partnering.



4 WAYS TO REGISTER:

- Call:** 1-800-338-2223 or 781-891-8080
(weekdays, 9:00am–5:30pm EST)
- Fax to:** 781-398-1889
- Internet:** www.ManagementRoundtable.com
- Mail to:** Customer Visits Workshop
c/o Management Roundtable
92 Crescent Street, Waltham, MA 02453

Please accept the following registration(s):

(Please use photocopies for additional people)

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WORKSHOP FEE: \$1995/person. Fee includes all program materials, luncheons, continental breakfasts, networking reception and refreshment breaks. NOTE: This workshop is strictly limited to 35 participants; reserve early to ensure your seat.

WORKSHOP SCHEDULE: Two-day workshop format. The workshop will be held December 3-4, 2008. Registration /continental breakfast begins at 7:30 a.m. on day one; session begins at 8:00 a.m. and concludes at 4:00 p.m. on day two.

LOCATION & HOTEL ACCOMMODATIONS: Paradise Point Resort, 1404 Vacation Road, San Diego, CA 92109. For room reservations, please call 858-274-4630 and mention that you will be attending Management Roundtable's Customer Visits Workshop. A limited block of rooms is available (please reserve early).

NO-RISK GUARANTEE: Your satisfaction is 100% guaranteed—money-back or credit. If you're not satisfied with the quality of this program, let us know in writing and we'll refund your registration fee.

CANCELLATIONS/SUBSTITUTIONS: You may send a substitute attendee in your place at any time with no penalty (please inform us in advance, if possible). Cancellations made within 5 business days are subject to a \$200 administration fee or the full fee can be credited towards a future purchase. No-shows are liable for the full fee.

CONFERENCE ATTIRE: Business casual.

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PRESENTED BY



Led by the foremost authority on customer visits:



EDWARD F. McQUARRIE, Ph.D.

Professor of Marketing, Santa Clara University, and author of *Customer Visits: Building a Better Market Focus* and *The Market Research Toolbox: A Concise Guide for Beginners*

SESSION IS LIMITED TO 35 PARTICIPANTS AND IS ESPECIALLY GEARED TO INDUSTRIAL AND B2B MARKETS WITH MULTIPLE CUSTOMERS.

"A very concise and robust workshop that provides useful explanations of the tools and methods to get the most value from the customer visit."

Paul V. Gaetani, Product Manager, Kronos

"The workshop enabled me to perform a more thorough planning of customer visits and helped me to adjust my style. It was two days well spent—the skills I learned will help me tremendously."

Gilbert Hausmann, Sr. Technology Manager, Tyco Healthcare

An intensive, two-day seminar on how to design, conduct and analyze customer visits for new product innovation. Learn proven techniques to identify customer needs — including unmet, unspoken needs — and significantly boost your product success rate.

Learn:

The ABC's of customer visits – when to do them, how many are enough, how to assemble the team, how to ask the right questions and how to report out the key findings

How to understand what customers can (and cannot) tell you – stop wasting time on questions that don't work and identify questions that will yield real insight!

Analytical tools to link the Voice of the Customer to product design and key business decisions

How to gain the organizational buy-in required for a successful customer visit program

Why a cross-functional team approach for customer visits is a MUST and how to prepare these teams for success

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OFTEN CUSTOMERS CAN'T TELL YOU WHAT THEY REALLY WANT. Yet unspoken needs not only drive buying behavior, they are a powerful source of new product innovation. Product developers who know how to tap into these needs are steps ahead of the competition.

Everything from knowing what to ask, whom to ask, and how to ask is critical. Just talking with customers, while admirable, can actually lead you astray if done incorrectly. That's why *Getting the Voice of the Customer Right: Mastering the Art of Customer Visits* will examine how to conduct customer visits — where you can personally enter the world of your customers and learn about their unspoken needs through direct interaction. Programmatic customer visits for product development have been a business practice for over twenty years and if executed successfully, can generate unique customer perspectives that would be difficult to gain from other VOC activities. Focused on best practices and key criteria for success, this seminar will provide participants with practical, step-by-step guidelines to successfully design, conduct and analyze a program of customer visits — specifically, it will prepare you for how to select the right customers, ask the right kinds of questions and uncover needs that customers don't know how to vocalize. In an economic climate plagued by fickle customers, fierce competition and product proliferation, you cannot afford not to master the art of conducting successful customer visits.

ABOUT THE COURSE INSTRUCTOR:



EDWARD F. MCQUARRIE is the Associate Dean for Assessment in the Leavey School of Business and professor in the Department of Marketing at Santa Clara University. Considered to be a leading VOC expert, McQuarrie is also the author of two ground breaking books on the subject including *Customer Visits: Building a Better Market Focus* and *The Market Research Toolbox: A Concise Guide for Beginners*. His research interests include implementation of a market focus, qualitative research, and technology strategy, on the one hand, and advertising research on the other. He has published articles in the *Journal of Consumer Research*, *Journal of Customer Psychology*, *Journal of Product Innovation Management*, *Marketing Management*, *Marketing Research*, *Journal of the Market Research Society*, *Journal of Advertising*, *Journal of Advertising Research*, and others. His depth of knowledge in the topic area is reflected in support from the Marketing Science Institute, among others.

Professor McQuarrie has twelve years of experience moderating focus groups for Burke Marketing Research of Cincinnati, has consulted for a variety of technology firms, and has taught seminars on Effective Customer Visits, Managing Focus Group Research, Marketing Research Methods, and similar topics for Hewlett-Packard, Sun Microsystems, Digital Equipment, Apple Computer, Compaq Computer, Informix, Sybase, Varian Associates, Cadence Design, and others.

Who Should Attend

VPs, Managers and Directors of New Product Development, Engineering, R&D, Product Management, Marketing, Technology, Quality, Business Development, Strategic Planning and any position with responsibilities related to identifying and responding to customer needs and market developments.

The customer visit technique was developed to meet the special needs of industrial and B2B markets—best for firms whose market includes dozens, hundreds or thousands of potential customers; not suitable for firms with only one customer or who serve only a handful of OEMs. Specific industries that will gain the most benefit from this seminar include: computers, electronics, industrial equipment & supplies, medical devices, financial services, hospital supplies, and building infrastructure.

Attend this seminar and get:

- > Best practices for conducting customer visits aimed at gathering VOC data
- > Step-by-step guidelines to design, implement and analyze the results of a program of customer visits
- > Specific guidance and advice on how to combine customer visits with other market research techniques to improve business decisions
- > A reprint of Prof. McQuarrie's book, *Customer Visits: Building a Better Market Focus*
- > Recommendations and advice for your specific customer visit program

Course Outline

Agenda at a Glance

Day 1 December 3

- 7:30 - 8:00 Registration & Continental Breakfast
- 8:00 - 10:00 **Session 1: Where Customer Visits Fit in the Market Research Toolbox**
- 10:00- 10:30 Refreshment Break
- 10:30 - 12:00 **Session 2: Planning a Program of Customer Visits**
- 12:00 - 1:00 Lunch
- 1:00 - 3:00 **Session 3: Selecting Which Customers to Visit**
- 3:00 - 3:15 Refreshment Break
- 3:15 - 5:00 **Session 4: Designing a Discussion Guide**
- 5:15 - 6:30 Networking Reception

Day 2 December 4

- 7:30 - 8:00 Continental Breakfast
- 8:00 - 10:00 **Session 5: The Art of Constructing Good Questions**
- 10:00 - 10:30 Refreshment Break
- 10:30 - 12:15 **Session 6: Honing Your Interview Skills**
- 12:15 - 1:15 Lunch
- 1:15 - 2:45 **Session 7: Analyzing Customer Visit Data**
- 2:45 - 3:00 Refreshment Break
- 3:00 - 4:00 **Session 8: Wrap-up and Action Items**

Tuesday, December 3

Session 1: Where Customer Visits Fit in the Market Research Toolbox

- An overview of the benefits of ad hoc vs. programmatic customer visits
- Programmatic customer visits are qualitative market research—learn about their unique advantages relative to other qualitative tools like focus groups
- Discover the different kind of information that can be obtained from customer visits versus surveys (and why)
- Understand the importance and value of completing customer visits early in the decision cycle and their use in paving the way for subsequent research

Session 2: Planning a Program of Customer Visits

- Developing a time line for implementing a program of visits—identify key dates
- Learn how to articulate and define the decision problem that requires customer visits
- **EXERCISE:** Participants will define their own research objectives and receive feedback
- How to organize your customer visit team for success—understanding the power of a cross-functional approach
- Gaining organizational buy-in and support—how to work successfully with account management and other stakeholders
- Preparing for international customer visits—managing cultural differences

Session 3: Selecting Which Customers to Visit

- Strategies for identifying relevant customer segments
- Rules of thumb for sizing the sample—how to calculate the number of visits needed
- How to balance market coverage against the costs and time of larger samples—when is a larger sample necessary?
- Selecting the right job functions to interview within customer organizations—which functions are critical to involve?
- **EXERCISE:** Participants will develop sample plans and provide/receive feedback from other participants and the instructor

Session 4: Designing a Discussion Guide

- How to identify the right topics to discuss and determine the proper sequencing of those topics to maximize learning
- Gain a better understanding of the negative effects of poorly defined topics on the quality (and quantity) of customer data collected
- **EXERCISE:** Participants will develop a discussion guide and provide/receive feedback from other participants and the instructor

Wednesday, December 4

Session 5: The Art of Constructing Good Questions

- How to create questions that will yield good insights and gain a better understanding of unmet customer needs
- Identify strategies that help customers to vocalize needs that they don't know they have
- Key steps to determine the economic value (from your customer's perspective) of a proposed product solution
- An overview of the key criteria for identifying good questions
- **EXERCISE:** Participants will construct sample questions and will provide/receive feedback from other participants and the instructor

Session 6: Honing Your Interview Skills

- Setting and managing customer expectations from the outset
- Proven techniques and tips to establish rapport with interviewees
- How to probe effectively and not bias responses or lead interviewees
- An overview of common mistakes novice interviewers can make and how to avoid them
- How to manage difficult circumstances that can arise in customer visits—examples and potential solutions are discussed

Session 7: Analyzing Customer Visit Data

- Now that you've captured the data, how do you analyze and interpret it? Practical procedures to organize, summarize and communicate the output of customer visits
- A review of available analytical tools—matrices, process maps and conceptual tables that can be used to extract the key learnings from the customer data; understand when to use which tools and why
- How to use data collected from customer visits to drive design and new product decisions

Session 8: Wrap-up and Action Items

- Protocol for reporting customer visit programs—who to inform and in what format
- How to maintain customer visit results—where to store them and how to make use of the data later on
- Review: Key challenges to successfully implement customer visits and how to overcome them
- How to get started at your organization—apply what you've learned and outline your implementation steps
- After the visits: When does it make sense to engage in follow-up research to build on data from customer visits?
- Summary of key workshop learnings

"This workshop provided excellent guidance on how and what to ask customers, as well as how to analyze customer responses."

Laura Holte, Product Manager, Cyber Optics Corporation

"It dealt with real-world, practical, everyday issues that apply to my work. I enjoyed the course and found it most worthwhile."

Robert Green, Sr. Market Development Manager, Keithley Instruments

"I should have attended a year ago, before our customer visit program. We could have doubled the value!"

Lois Davis, Global Business Manager, Novozymes

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