Overview of the Voice of the Customer Project

The project will teach you how to conduct a Voice of the Customer, and how to incorporate the information that you collect into a professional survey.

There are three deliverables:

- Interview discussion guide

- Interview transcripts

- Final report

Here are the steps in the project.

Step 1 Pick team

For the project you will need to create teams of 3-5 persons (teams of 4 are recommended). You can look over samples from previous projects in the course packet.

Step 2 Pick topic and prepare interview guide

Pick the project objective.

*** Express the objective using one or more of the five key verbs (forming the GUIDE acronym):

Generate (…customer needs in connection with a product or service).
Understand (…the customer's point of view about an issue or problem).
Identify (…areas where current product performance falls short).
Describe (… the decision process of a certain type of customer)
Explore (… the customer's perceptions of a company, or product).

You don't want an objective that is narrow or quantitative (e.g., forecasting market share for a new product, sizing a market, etc..).

After you have selected the topic, you should then recruit several customers (at least one per team member) and give them their "homework assignment." This assignment is an adaptation of the key steps used in ZMET (see readings for Feb 22 class). You will ask each customer to collect 6-12 images that are in some way related to the topic. The images can come from any source (preferably, they are photos, e.g., by iPhone, taken just for the exercise, but they can also be clips from magazine). The images should be brought to the interview. Give the customers at least 3-4 days to collect the pictures. Tell them not to do the collecting just before the interview.

While the customers are collecting their images, you should schedule a meeting to work out the interview guide. Follow the guidelines in Voices Into Choices, Step 4. You can also look at the examples in the Consumer Behavior Exercise (distributed on Feb 7). The guide should be short, fitting on one page. It is due in class on Feb 14 – do not conduct your interview until we have checked your interview guide.

Step 3   Conduct customer interviews

The interview itself should have two parts. In the first part of the interview, ask the customer to describe how each particular image they brought to the interview is related to the topic. In the second part, continue the interview with questions from your previously prepared interview guide. Throughout the interview, do be satisfied with easy answers, but probe for hidden meanings. Follow the interview guidelines in Voices into Choices (Steps 10 or 12), or in Customer Visits (Chapter 4).

You should tape the interview.

Step 4   Transcribe customer interviews and identify voices

Working from the tapes, create a transcript of the interview, and make two copies. Distribute the copies among the team members. The goal is to have two team members separately read each transcript. For example, if your team has three members, and you interview four individuals, then the "reading assignments" should look like this:

	Team member 1	Team member 2	Team member 3
Customer 1	x	x	
Customer 2		x	x
Customer 3	x		x
Customer 4	x	x	

Each team member should sit down alone with their transcripts and identify a set of customer statements. Follow the guidelines for identification from Voices into Choices (Step R15 or T15).

A crucial part of this process is capturing the customer's own voice, with a minimum of interpretation. You may want to begin by simply highlighting key statements from the interview transcripts. We call these statements voices. They could be needs, concerns, images, experiences, feelings, problems, solutions, or anything else that helps us understand the customer's point of view.

Next, write out the voices on the self-stick notes, only editing where necessary to improve understanding or eliminate irrelevant details. Number each voice and identify your own notes by writing your initials in one corner. These voices on self-stick notes will be used during the in-class exercise to help your group create a mental image of the entire customer's voice. The voices collected from a single customer interview are likely to vary widely. In Step 4, the goal is simply to document the voices identified by the interview and not to analyze the relationships among them.

Step 5A **Interpretation or 'scrubbing' of the voices (class exercise)**

The scrubbing process is described in Voices into Choices (Step R16), and we will review it briefly in class. The output is a list of 25 of fewer nonredundant and semantically 'scrubbed' customer needs or requirements.

The goals of step 5A are to combine the voices identified by each of the team members on self-stick notes into a set of voices agreed upon by the team, and to translate these voices into customer needs or requirements. The output of this process will be a set of 25 or fewer key customer requirements.

NOTE: Translating voices into requirements is appropriate if the objective of your project is to understand customer needs or likes/dislikes in a given domain. Typically, this would then lead to the development of new concepts - for products, services, ad campaigns, and so on. If your project has a very different objective, then it may be more appropriate to translate the voices into some other format (not 'requirements' per se).

Time breakdown for the class exercise:

(30 min) Each team member brings their set of voices from Step 4 to the exercise. One team member begins placing his or her voices on a sheet of flip chart paper, and reads each voice aloud to the team as it is placed on the chart. If other team members have identified the same or a very similar voice, they stack their notes on top of the original note, completely covering it. (As a general rule, similarity among voices is indicated by placing them closer together on the chart.) After the first team member has finished reading his or her voices, the next team member reads any of his or her remaining voices. The process continues until all voices are placed on the chart.

(15 min) The next step is to select the most essential voices (not more than 25) which represent the customer's perspectives, opinions, or feelings (see Step R15, p. 251 in Voices into Choices). If several voices reflect the same thoughts, pick the voices that best describe a need rather than a similar statement that is more narrowly solution-focused. Focus on the concrete, first-hand experiences of your customer rather than generalizations. As you select voices, move them to a second sheet of flip chart paper. Once you have consolidated similar voices, if you are still left with more than 25, agree on the most essential voices as a team. Discard the others from the chart.

(45 min) The final step is to construct Requirement Statements. The goal of this step is to create a set of action-oriented statements identifying functions that are critical to the customer. First, transfer the self-stick note documenting each of the core 25 voices to the top section of the requirement worksheet. Next, identify 1-3 key ideas being conveyed by the voice. Finally, write an action-oriented statement that translates the voice into a requirement following the guidelines outlined below. Keep in mind that one voice might translate into two or more requirements, each of which may reflect a different key item.

Step R16 in <u>Voices into Choices</u> gives guidelines about translating customer voices into requirements. Here are some examples in the context of student evaluation of cafeteria service:

- ☐ Avoid statements in the negative form: use "open during peak student demand" rather than "doesn't close early."
- ☐ Use multi-valued attributes rather than two-valued (yes/no) attributes: use "minimize time spent getting and paying for food" rather than "no waiting in line".
- ☐ Avoid abstract words. Be specific about the customer's needs.
- ☐ Avoid statements of a specific solution, e.g., "they should have more cashiers at lunchtime."
- ☐ Avoid premature details, e.g., "stays open until 6:00 PM".
- ☐ Use the concrete terms of the customer's own experience rather than intangible concepts: use "offers several brands of juices" rather than "offers a good selection."

For example:

Voice:

- ☐ "I don't have much time [so] I get really irritated standing in a long line."

Key items:

- ☐ customer is time-constrained
- ☐ customers may become irritated if the process of getting food takes a long time.

Requirement:

- ☐ "Minimize time spent getting and paying for food"

To save time you can divide voices among the team members for an initial translation. Afterwards, the team checks each other's work, discussing potential changes.

Step 5B   <u>Diagram the requirements</u>

Schedule a group meeting. Follow the instructions for making an "affinity diagram" as described in Step R17 of <u>Voices into Choices</u>.

Step 6 <u>Brainstorm for the best solution to the problem.</u>

You should attempt to identify a possible solution to the motivating problem for the project, e.g.,

- a new product concept, meeting the a key customer need identified in the VOC
- a statement of the most significant deficiency or problem with a product or organization
- a definition of the actual and desired brand or company image

This solution should make sense given the evidence collected in the Voice of the Customer, but you don't have to defend it with any quantitative evidence. Just use your group judgment (e.g., brainstorm and discuss). You can use Steps 18 and 19 in Voices into Choices as a guide for brainstorming ideas, and picking the best solution.

Step 7 <u>Prepare report and presentation</u>

The Report

The report should be about 15 pages long, and cover the following:

1 Statement of objective
2 Description of methodology
3 Qualitative interpretation of the interviews
4 Affinity diagram
5 What has been learned – proposed solution & future research
6 Appendix - Pictures collected from the customers

You can make adjustments to this sequence of topics, but check with me first.

The most important part of the report is Section 3 on "qualitative interpretation." You might want to use as a model the readings: "To save or to spend," which is a professional summary of a daylong focus group in which I participated. Note the use of direct quotes, headings, and paragraph-length summaries.