Gaining Market and Customer Insights through In-Depth Interviews



Kickoff Call

January 11, 2021

Pragmatic
Alumni
Community

Agenda

- Facilitator introduction – meet Chad Eckes
- Course ground rules and processes
- Course description and syllabus
- Q&A

Meet the Instructor – Chad Eckes



- Founder and Principal of C Squared E
- Strategy and marketing consulting for enterprise technology companies
  - Markets: supply chain management, healthcare IT, cybersecurity, e-commerce, content management, language translation, gig economy marketplaces, professional services, additive manufacturing, and more
- Pragmatic Institute trained in 2005 and 2008
- Experience gained through dozens of research projects across 30+ clients
- Prior roles:
  - Director of Product Strategy, 3M Company
  - Engagement Manager, Accenture
- BA Northwestern University, MBA MIT Sloan School of Management
- Based in Minneapolis, MN

Why Learn about In-depth Interviews?



- One of the most important roles of product managers and product marketing managers is to ***understand their market and their customers***

- An important method for understanding customer problems can be ***in-depth interviews*** with ***customers***, ***potential customers***, or ***market experts***

- Interviewing people effectively is a skill that ***takes practice***, and capturing the key takeaways from the interviews should ***follow a process*** to ensure efficiency

Course Instruction Method



- In this masterclass, Chad will step through an ***actual research project***, which included in-depth interviews with customers of a middle-market IT services company, Techie Co.

- Each week will entail an explanation of a facet of the research project, the tools and processes employed, and the ***resulting deliverables***

- Learners will be provided ***templates and examples*** of the deliverables, and be asked to ***create their own*** for a future, current or prior research project

Course Cadence and Expectations



- **Weekly posts on Mondays by Chad to the Group will include:**
  - Short video / story / lecture
  - Accompanying attachments: articles, templates, examples
  - Assignment instructions

- **Group members reply to the weekly posts with:**
  - Questions
  - Examples from personal experience … what has worked well, lessons learned, epic failures!! ☺
  - Completed assignments … there are no wrong answers!

- **Assignments are due at *12:00 PM Pacific the following Monday***

- **Members are required to post feedback on *at least one other members' assignment***

- **We are all in this together to learn from each other!**

Course Syllabus

Week	Learning Objectives	What You Will Learn	Attachments	Assignment
1	Define the scope of the research project Create an issue tree	• How to frame up the project, in order to socialize it with your co-workers / supervisor / client, and gain consensus on what problem(s) you are trying to solve with the research • Definition of an issue tree, how to construct one, and what level of detail to include at this stage	• SCQH article • Issue tree example	Create SCQH and issue tree
2	Describe the target personas	• How to create persona profiles, and how to prioritize which persona(s) should be targeted for research	• Persona templates	Create persona document
3	Create an interview guide Recruit customers for the research	• What constitutes a good interview guide for particular lengths of interviews (e.g., 30 minutes vs. 60 minutes), how to start and end an interview, and the importance of open-ended questions • Methods for identifying, soliciting and securing agreement from your interviewees	• Interview guide example	Create interview guide
4	Conduct phone, video or in-person interviews	• How to prepare for a good phone interview, as well as processes and technologies to help them be successful	• Best practices when conducting an interview • Recording of past interviews	5-10 minute audio / video recording of a mock interview
5	Analyze interview transcripts Identify recurring themes, voices and key takeaways	• The value of recording and transcribing interviews, and a method to identify the right data contained in the interviews • How to "boil the ocean" and pull-out the most-important messages from the body of interviews	• Transcript examples • Affinity diagrams	Read three transcripts and develop an affinity diagram
6	Develop a report of the research	• Common report templates and storylines, and how to frame the results appropriately for the audience you're presenting to	• Final report examples	Slides or document summarizing market intelligence gleaned from research

Questions