Online

Bay Area Content Marketing Meetup

Masterclass in 45 Minutes: Gaining Customer and Market Insights Through In-Depth Interviews



Chad Eckes

- Founder and Principal, C Squared E

October 5, 2023

12:00 PM Pacific

Hello, I'm Chad Eckes



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- Founder and Principal of C Squared E
  - Go-to-market strategy & pricing consulting for B2B software & SaaS
- In-depth interview & voice-of-the-customer experience gained through dozens of research projects across >35 clients
- Prior roles:
  - Director of Product Strategy, 3M Company
  - Engagement Manager, Accenture
- BA Northwestern University, MBA MIT Sloan School of Management
- Pragmatic Institute™ certified product manager and product marketer
- Based in Minneapolis, MN

cSquaredE 3M accenture PRAGMATIC INSTITUTE

Scope of Today's Presentation

- Based on a 6-week masterclass for Pragmatic Institute™ (www.pragmaticinstitute.com), which steps through an actual research project, highlighting tools and processes employed, and the resulting deliverables

- Today will hit the highlights of the 6-week course, condensed into 45 minutes, with all the templates and examples of the deliverables made available to attendees after the presentation

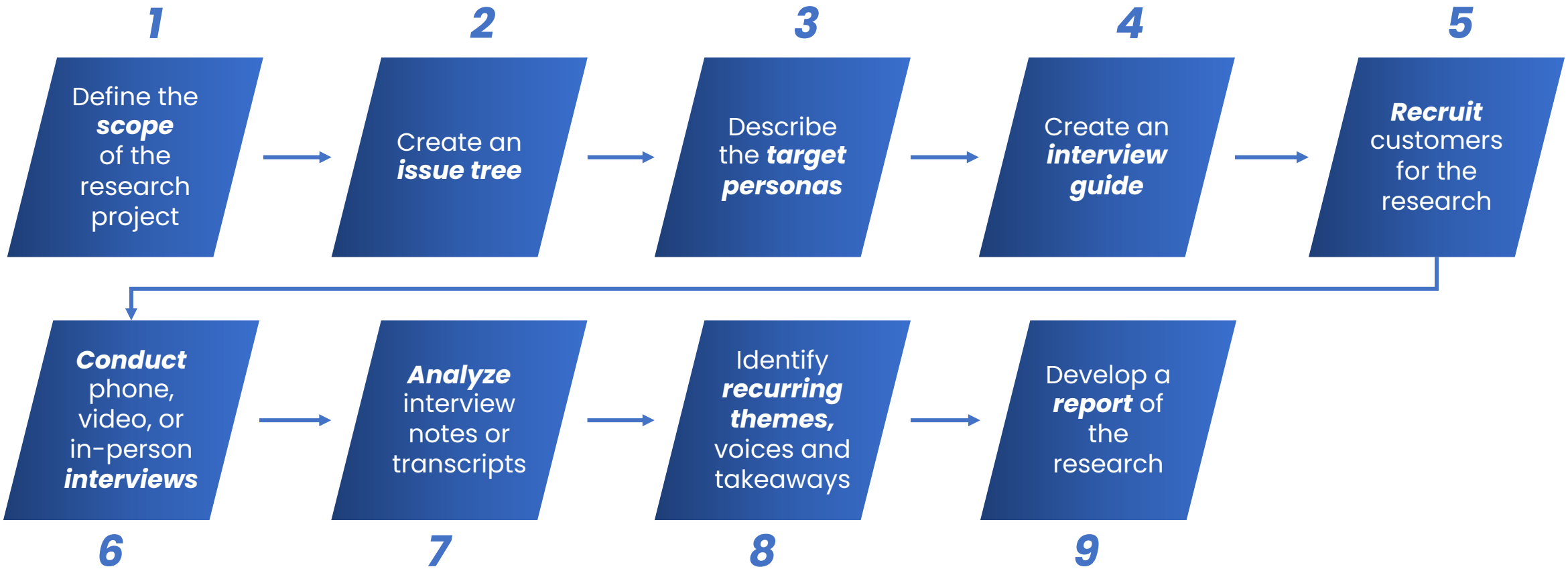
What You'll Leave With

1. Nine key activities of an in-depth interview project
2. Seven key outputs (deliverables) from an in-depth interview project
3. Ten tips for conducting great interviews
4. Access to examples of the tools, templates and sample deliverables

Nine Key Activities

when conducting in-depth interviews

Nine Key Activities



Seven Outputs (Deliverables)

of in-depth interview projects

Seven Outputs (Deliverables)

SCQH[1] statement

Issue tree

Persona descriptions

Interview guide

Interview notes and transcripts

Affinity diagram

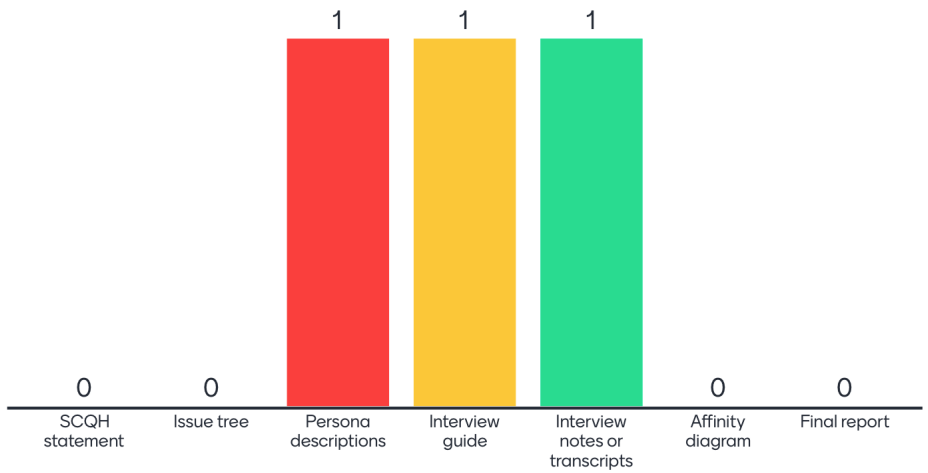
Final report

[1]Situation, Complication, Question, Hypothesis

Join at menti.com use code 3727 5167

Mentimeter

Which of these tools have you used before (whether as part of a research project or otherwise)?



1

The Nine Key Activities

Activity 1
Define Project Scope

Where to Start?

- When faced with a wide variety of problems that need addressing, a product manager or marketer needs to find a way to ***focus***
  - You can't boil the ocean and fix everything at once
  - With limited time and resources to conduct research, you need to pick the most-important problems to solve ***first***

- A good tool to use to help you and your team focus is to use the ***Situation >> Complication >> Question >> Hypothesis (SCQH)*** framework

SCQH Framework

SCQH tells a short story of a problem (situation, complication), a question about what to do, and a potential solution in the form of the hypothesis.

Situation	*Where are we now? What's the context?*
Complication	*What's the problem? What's not working?*
Question	*What do we need to work out? What can we do?*
Hypothesis	*What we propose to do to that answers the question.*

Source: https://playbook.datopian.com/scqh/#introduction

Example SCQH

Situation

Techie Co. is a leading provider of data center, network architecture, and IT managed services. With operations and customers in multiple countries, the company has experienced solid growth for many years, and continues to aggressively pursue new accounts.

Complication

Techie Co. has struggled to build a repeatable, predictable sales process, and has relied on their CEO and their new head of business development to source and close new deals. Further, the company feels their website is outdated, and desires to revamp their story to the market.

Question

What is the ***optimal positioning*** for Techie Co.?

Hypothesis

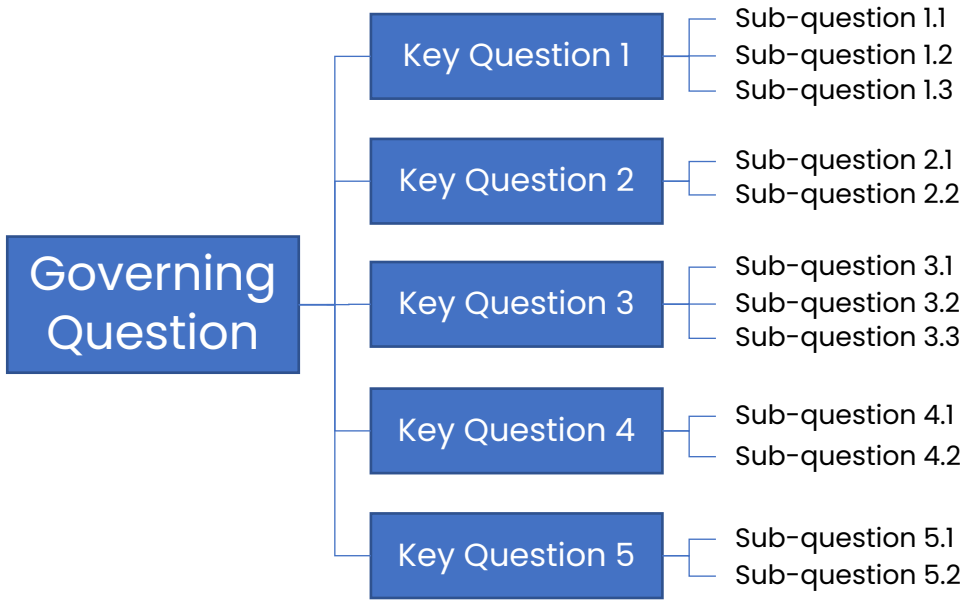
By conducting primary and secondary research, Techie Co. can gain newfound understanding of their value proposition, leading to refined positioning, messaging, a new website and sales process.

Activity 2
Create an Issue Tree

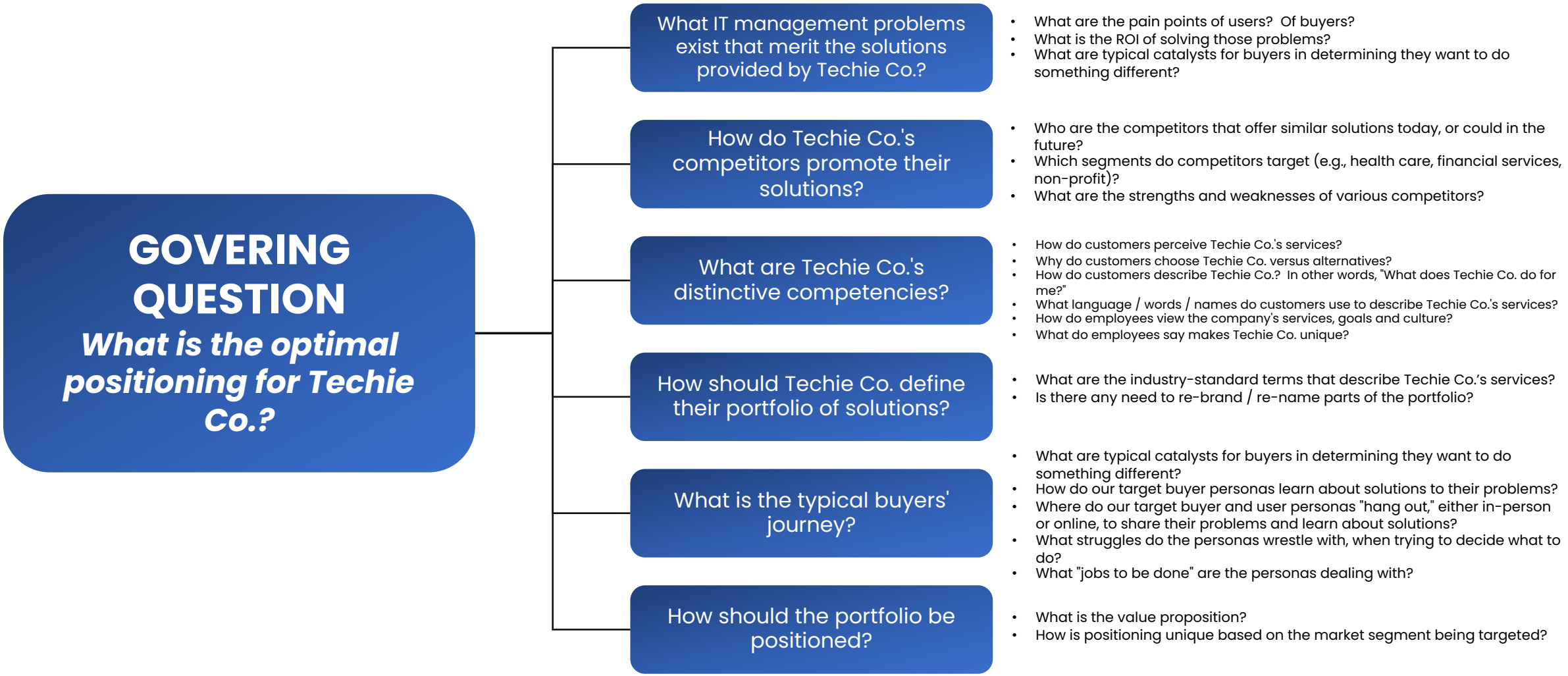
Underpin the SCQH with an Issue Tree

- Using the governing question from SCQH, define a ***series of sub-questions*** that, when answered, will provide a comprehensive solution to the problem

- The issue tree can also provide a road map / work plan for your overall research project



Example Issue Tree



Benefits of SCQH and Issue Trees

- ✓ Helps communicate the scope of the research with peers and supervisors
- ✓ Helps understand the breadth and depth of the research to be undertaken
- ✓ Brings focus to the research project
- ✓ Provides a work plan for the project (Start, Middle, End)
- ✓ Gives the research a compass when determining the personas desired for in-depth interviews

Activity 3
Describe the Target Personas

Who should we talk to, to get answers to our questions?

- Start with the Issue Tree … what do we want to know?
- Ask ourselves: who can provide us those insights?
  - *Existing users?*
  - *Purchasing decision-makers?*
  - *Influencers or experts*
  - *Potential users?*
  - *Customers of competitive products?*



When defining the “Who,” be FOCUSED and SPECIFIC

- Keep your list of personas small; you want to talk to people who have a lot in common, so you can identify key trends within that segment

- Strive to get specific
  - NOT: Vice Presidents of supply chain
  - BUT INSTEAD: Vice Presidents of supply chain at Tier one North American automotive suppliers (>$1B sales) that have purchased a robotic palletizing system in the past 24 months



Persona Definitions



- If you have some created already, great! Make sure they're updated and relevant for your interview endeavors
- If not, find a template online to document your ideal interview candidates (Pragmatic Institute™ has good persona worksheets)
- Use these to communicate your targets with other people on your team

Benefits of defining target personas for in-depth interviews

- ✓ Easy format for you and your team to discuss who you want to talk to
- ✓ Enables you to identify meaningful and actionable trends in respondents' answers in the interviews
- ✓ Will bring deeper understanding to a persona's "day in the life" after you've interviewed a bunch of them
- ✓ Helps keep the interview guide focused

Activity 4
Create an Interview Guide

Interview Guide Example

#	Main Question	Drill Down / Listen For
1	When and how did you first learn about Techie Co.?	• Who referred you, and why did you follow-up? • What compelled you after seeing an advertisement? • Who did you talk to first? In person or phone? • What impressed you about our product initially? • What if anything turned you off about our product initially?
2	Why did you decide to purchase from Techie Co.?	• What was the situation / catalyst you were dealing with? Problems you were facing? • Did you evaluate other alternatives? Which vendors?
3	What has your experience been with Techie Co.?	• Positives? • Negatives / areas for improvement? • What if any bumps in the road have there been? What did our product do to rectify those issues?
4	What do you feel is our company's value proposition?	• What peace of mind does the company's services give you? • What does your partnership with our company enable your organization to do better? • In the grand scheme of things, how critical is our service to your organization's success? • Tell me about the ROI.

Characteristics of Good Interview Questions

- Open-ended questions
  - How do you …? Why do you …? Tell me about …
- Conversational style
- Your job is to ***listen*** and probe for details/specifics … ***get the person talking***
  - Put them in the place of authority; make them feel like the expert; observe/hear their emotions

- Don’t ask a lot of yes/no questions
  - Bad question: Do you teach career readiness skills in your courses today?
  - Better questions: How do career readiness skills fit into your courses today?





Tips for Good Interview Guides

- Define high-level, open-ended questions
  - Also, define drill-down / prompting questions
- Think of a good, not-too-difficult opening question to get the person talking and comfortable with being interviewed
- Words matter … how you ask a question matters
- Refer back to your issue tree
- The guide is a ***guide***
  - You won't always ask the questions in the exact order you list them out
  - Use the guide to help keep you focused on what you want to cover
- Be conscious of how long you want interviews to take (30, 45 or 60 minutes??) and generate the guide accordingly



Length of Interview	Number of Main Questions
30 minutes	4-6
60 minutes	7-10

Benefits of Interview Guides

- ✓ Helps you think through the interview in advance
- ✓ Maps-out what your want to ask and how you want to ask certain questions
- ✓ Ensures you are scheduling the right amount of time for the interview
- ✓ Keeps you focused during the interview, so things don’t get off track

Activity 5
Recruit Participants

Thinking about Recruitment



- One of the most-important activities of any in-depth interview effort is ***recruiting and securing candidates to participate*** in the interviews!
- This is rarely easy and low-effort ☹
- Most-likely, you must be thinking about recruitment at the ***beginning*** of the project, alongside of defining your issue tree and personas … there's no use in doing this if you can't get access to the people you want to talk to!
- Recruitment methods will be different depending on who you are going after (e.g., customers, potential customers, users of competitive products, etc.)

Thoughts on Recruiting Existing Customers

- First determine if you can do this yourself, or if you need others to help you (most likely the latter)
  - Do you have relationships with customers that you can recruit?
  - Do you have to leverage your colleagues' relationships with customers?

- When leveraging others, provide them the information they need to recruit for you
  - Research objectives
  - Key questions we're seeking answers to
  - Personas we desire to interview
  - Length of interview
  - What's in it for the interviewee?



Thoughts on “What’s in it for Them?”

- Ideally, you can offer the recruit something of value in exchange for their time
  - Insights on the market and what you’re hearing from other customers
  - Opportunity to get connected to other customers you’re interviewing
  - Written report with results from your research



- Sometimes, it might take monetary incentives, if the personas are hard-to-reach and very very busy



Thoughts on Recruiting Prospective Customers or Others

- Again, determine if you can do this yourself or need others to help you
  - Do you have relationships with people that you can recruit?
  - Do you have to network through your relationships to get to the target personas?
    - *What's in it for the colleague?*
    - *What's in it for the interviewee?*
  - How easy is it to find targets using your CRM, social media or purchased lists?
    - *Do you think you can "cold-call" people to get them to participate?*
  - Should you hire a market research recruitment firm?



Recruiting Tips

- ✓ Clearly state your objectives/reasons/purpose for conducting research
- ✓ Explain why you want to talk to THEM … why are they ***special***
- ✓ Offer something of value in return for the person's time
- ✓ Be genuine, approachable, courteous and appreciative in your outreach and communications

Activity 6
Conduct Interviews

Determine Phone vs. Video vs. In-person







Positives

- Low-cost
- You and interviewee can do it from anywhere
- No internet connection required
- People tend to talk more when they're not being watched

- Relatively low-cost
- Allows observation of facial expressions
- People can choose to just use audio if they don't have/want video

- Most-personal method; allows you to connect better with the person
- Allows observation of body language, facial expressions, and emotions which can be good cues for your questions

Downsides

- Can't see body language
- Harder to understand emotions
- Person may try to multi-task and not be fully-engaged in the interview

- Not everyone is comfortable using video conferencing or being on camera
- Requires a good internet connection
- Room backgrounds can be a distraction

- Can take more time (and money) when travel is involved
- Some people may be less open if you're speaking to them in-person at their workplace; also can be prone to interruptions

Recommendation: Go for the phone or video call

Other Determinations



- Recording the interviews (recommended)
- Transcribing the interviews (optional but very helpful)
  - Hire a human vs. AI
- Scheduling the interviews
  - Do-it-yourself with email and calendar invitations
  - Consider using an online poll or calendar tool (e.g., Calendly, Doodle) to share your available times with people
  - Have someone assist

Preparing for the Interview

- Research the person you'll be interviewing, using LinkedIn, their company's website, Google search, and insights from the person who helped recruit them
- Review interview guide and highlight any questions you particularly want to ask this person
- For phone / video interviews:
  - Secure a reliable conference line or video conference service that offers recordings and makes it easy to access / download them
  - Have the person's phone number and email address, in case they're not joining the call and you need to remind them ☺
  - Use a good microphone so you have high-quality audio
- Find a place for the interview where there will be limited background noise and few distractions



10 Tips when Interviewing

1. Arrive to the location or conference line early
2. Greet the person by name and use their name frequently in the interview
3. Start by explaining your purpose to make sure they're clear of the scope and that it is consistent with what they agreed to earlier
   - Explain why you're doing the research and how it will be used
   - Confirm the duration of the interview that's been agreed to (e.g., 30 or 60 minutes)
   - Confirm that recording the conversation is okay
   - Confirm the confidentiality of the information, and that it will only be used by you for research and not be made public
4. Remember to start the recording
5. Start with a meaningful but easy opening question (open-ended)
6. Listen! Be curious! Let them talk!
7. Type a few notes, but don't try to type everything they say
   - This is why its great to record the interview so you can go back and listen later
8. Confirm your understanding of key points by re-stating / re-phrasing what the person said … this shows you are listening
9. Watch the clock and your interview guide, to make sure you're going to get through your key questions
10. End the call with a sincere thank you





Activity 7
Review Interview Transcriptions

Method for Reviewing Transcripts

1. Create a spreadsheet with these column headers
   - Person
   - Statement / Quote
   - Theme or Category

Person	Statement / Quote	Theme

2. As you read a transcript, copy and paste key responses / statements (one per row)
   - Typically, these are direct answers to your questions, but often they're things you hadn't anticipated
   - Look especially for statements that have emotion in them; either very positive or very negative
   - *NOTE: You'll be using these statements later when you present your research, so capture statements that you think will stand-out to your team members*

3. Write a short 3-7 word ***theme*** that characterizes the statement
   - You will re-use these as you catalog other statements from other people
   - The idea is to identify common themes across the people you interviewed

Example of Spreadsheet

Person	Statement / Quote	Theme
Matthew Broderick	Overall I think they're doing a really good job	Overall Techie Co. has been good
Matthew Broderick	between Will and myself I think we have a really good working relationship	Good relationship with account manager
Matthew Broderick	Surg Co. is not very demanding in regard to IT requirements	Client demands sometimes not that rigorous
Matthew Broderick	I can't even say a contract because there's currently no contract that exists there's no MSA that exists between Key and Techie Co. so, we're actually in the process of reviewing a brand-new service contract between Techie Co. and Key, so it's more a gentlemen's agreement right now interestingly	No formal contract exists
Matthew Broderick	They're responsive	Techie Co. is responsive
Matthew Broderick	we have a on-site engineer that is assigned to us, his name is Dave and Dave is the de facto IT guy here, it's – Dave has been the IT face for many years now	Having an onsite engineer is positive
Matthew Broderick	Each time it happens, and we're trying to avoid this, but each time it happened, Will was on it and had somebody out here, the next morning. Very responsive and really reliable in that regard.	Techie Co. is responsive
Matthew Broderick	There's a little bit of feel of continuity rather than having a pool of 50 people, having a different one each week. That definitely helps.	We like having the same point of contact over time
Matthew Broderick	I'm still trying to wrap my head around in terms of where we're at in terms of cost. Cost is a little bit on the runaway track here. I report to the CEO and that was one of the things that I was immediately tasked with or people voiced, not just my boss, but other people as well. Voice concerns around price and cost of Techie Co. services.	Techie Co. charges high prices
Matthew Broderick	each month that I've been here, there have been massive overages in labor cost. For me, to get a handle of that, I really have to drill down into those tickets and understand what was the ticket for, how much time was spent and what area does that belong to in terms of categorization for us	We feel Techie Co.'s pricing and costs are out of control

Activity 8
Identify recurring themes, voices and key takeaways

Analyzing the List of Statements

1. Develop a list of all Themes you created
2. Count all occurrences of each Theme
3. Sort the list from highest to lowest

How-to Do This?

- Create a pivot table
- Use the COUNTIF function

RESULT

You now can see the most-common themes, which provides quantitative evidence of what your audience thinks

Theme	Frequency
Techie Co. is responsive	7
We wanted a partner who could grow with us	5
Techie Co. admits their mistakes	4
Techie Co. has good people	4
Techie Co. is a one stop shop for IT services	4
Techie Co. solves real problems	4
Techie Co. has our best interests in mind all the time	3
Techie Co. helps us grow and mature	3
Techie Co. is an extension of our team	3

Next Step: Affinity Diagram

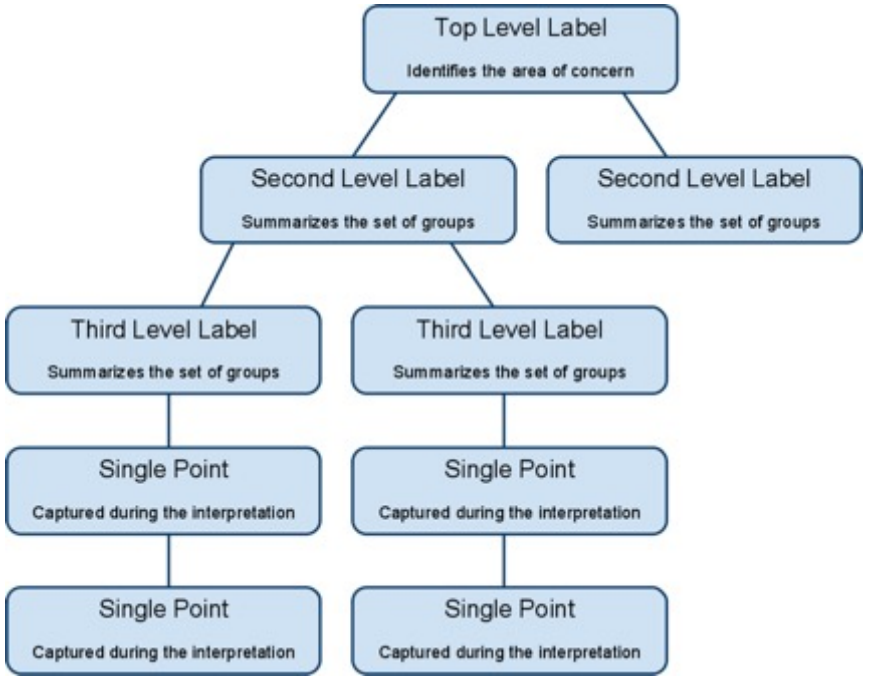
- The Affinity Diagram is a method which can help you gather large amounts of data and organize them into groups or themes based on their relationships[1]
- Creating a diagram will help you name, rank and understand relations between groups of information
- Essentially, this is trying to "*see the forest through the trees*"

How to do this?

- Review the ranked list of themes
- Begin to group them into 3-7 higher-level themes

Notes:

- You do not have to place every single theme into a group … some just won't be a fit and/or are not relevant enough
- This exercise may also help you reduce your overall number of themes, as you may re-categorize some after studying them again in the context of your list



[1]Source: https://www.interaction-design.org/literature/article/affinity-diagrams-learn-how-to-cluster-and-bundle-ideas-and-facts

Example of Affinity Diagram

Theme	Count	Key Strength / Differentiator	"Real Relationship" Theme	Major Themes	Improvement Areas
Techie Co. is responsive	7	x		Always there for us	
Techie Co. does things that serve themselves sometimes, not their clients	5				x
We wanted a partner who could grow with us	5	x	x	Always there for us	
Techie Co. admits their mistakes	4	x		Trustworthy and honest	
Techie Co. has good people	4	x		Expertise	
Techie Co. is a one stop shop for IT services	4	x		Expertise	
Techie Co. solves problems	4	x		Always there for us	
Overall Techie Co. has been good	4				
Techie Co. can provide just the services we need	3	x		Trustworthy and honest	
Techie Co. has our best interests in mind all the time	3	x		Trustworthy and honest	
Techie Co. helps us grow and mature	3	x		Expertise	
Techie Co. is an extension of our team	3	x	x	Always there for us	
Techie Co. is taking advantage of us	3				x
Techie Co. should stick to their core strengths	3				
Techie Co. works collaboratively with us	3	x	x	Trustworthy and honest	
Having an onsite engineer is positive	3	x	x	Likeable and personable	
ROI is I can buy only what I need	3	x			
We found Techie Co. through a relationship	3				
We pay a premium for Techie Co.	3				

Activity 9
Develop the Report

Planning Your Report

1. Determine if the report is meant to provide data, or also to persuade the audience
   - “Here’s the data … what do you think?”
   - “Here’s what I think we should do, based on this data.”

2. Establish your audience for the report … who are you informing / persuading with the data you’ll be presenting?
   - Product development?
   - Senior management?
   - Customer service?

3. Decide on the most important points you want the reader to leave with
   - The key themes you defined with the affinity diagram
   - The answers to your issue tree questions
   - The “what’s next” you are proposing based on the research

4. Determine if the report is meant to be A) read by your audience, and/or B) presented in front of your audience

Report Layout Ideas

Most-important Information First

1. Executive summary with conclusions and next steps
2. Research process
   a) Key questions we wanted answered
   b) People we talked to
3. Key takeaways / themes
4. Supporting data for the themes
5. Re-state conclusions and next steps
6. Appendix with additional supporting data

Most-important Information Last

1. Research process
   a) Key questions we wanted answered
   b) People we talked to
2. Key takeaways / themes
3. Supporting data for the themes
4. Conclusions and next steps
5. Appendix with additional supporting data

Report Example



Report Example (continued)



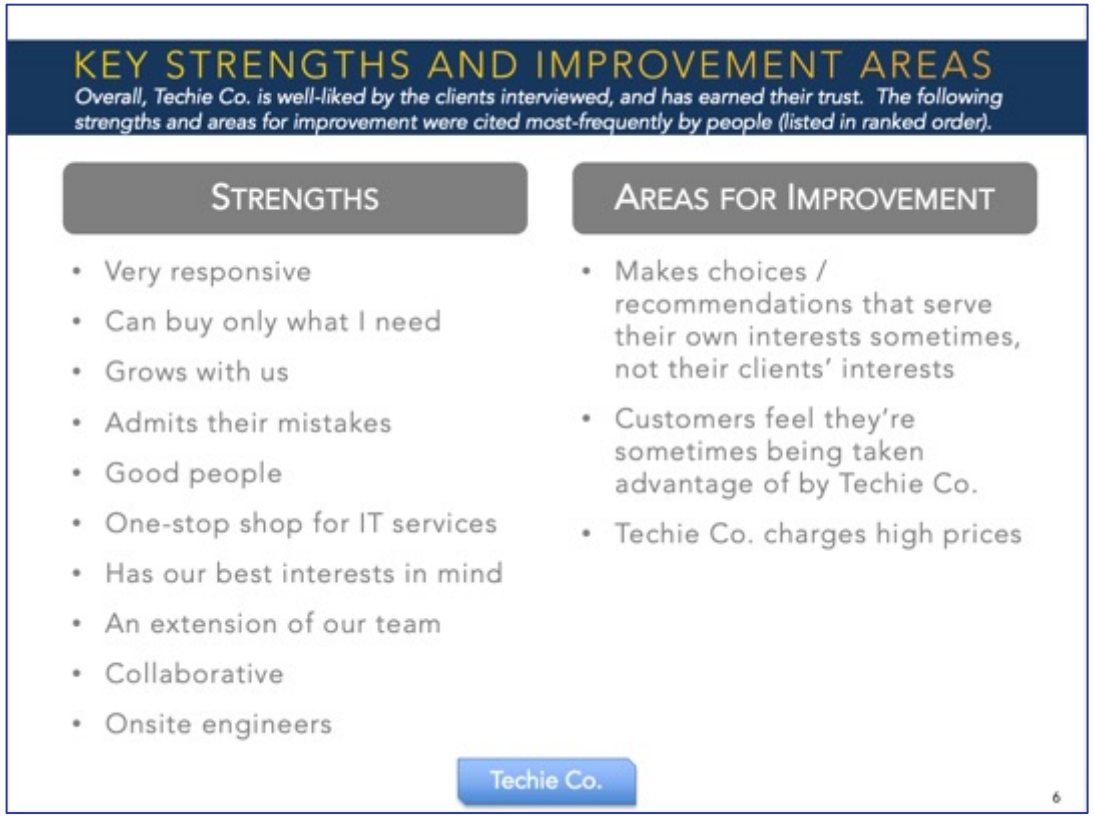
CUSTOMERS INTERVIEWED

13 individuals were interviewed over the phone, to hear opinions on Techie Co.'s strengths, areas for improvement, and unique value proposition.

Contact	Client	Title	AM	Market Segment
[redacted]	[redacted]	CFO	[redacted]	Financial Svcs
[redacted]	[redacted]	Director of Finance	[redacted]	E-Commerce
[redacted]	[redacted]	President	[redacted]	Software / SaaS
[redacted]	[redacted]	Director, Enterprise Technology	[redacted]	Retail
[redacted]	[redacted]	Director of Engineering	[redacted]	Software / SaaS
[redacted]	[redacted]	Vice President	[redacted]	Software implementation
[redacted]	[redacted]	Director of IT	[redacted]	Manufacturing
[redacted]	[redacted]	President & COO	[redacted]	Manufacturing
[redacted]	[redacted]	Technology Manager	[redacted]	Event production
[redacted]	[redacted]	CEO	[redacted]	Event production
[redacted]	[redacted]	IT Procurement	[redacted]	Insurance
[redacted]	[redacted]	VP IT	[redacted]	Healthcare
[redacted]	[redacted]	Office Manager	[redacted]	Sports Team

Techie Co.

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KEY STRENGTHS AND IMPROVEMENT AREAS

Overall, Techie Co. is well-liked by the clients interviewed, and has earned their trust. The following strengths and areas for improvement were cited most-frequently by people (listed in ranked order).

STRENGTHS

- Very responsive
- Can buy only what I need
- Grows with us
- Admits their mistakes
- Good people
- One-stop shop for IT services
- Has our best interests in mind
- An extension of our team
- Collaborative
- Onsite engineers

AREAS FOR IMPROVEMENT

- Makes choices / recommendations that serve their own interests sometimes, not their clients' interests
- Customers feel they're sometimes being taken advantage of by Techie Co.
- Techie Co. charges high prices

Techie Co.

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Report Example (continued)

OVERARCHING THEMES

Customers were asked to provide five words to describe Techie Co. Analysis of those responses, and of the aforementioned strengths, results in four main descriptors of the company, centered around their people and service.

WORD CLOUD FROM CUSTOMER RESPONSES



OVERARCHING THEMES

- ALWAYS THERE FOR US
- LIKEABLE AND PERSONABLE
- EXPERTISE
- TRUSTWORTHY AND HONEST

Note: Size of the word in the word cloud represents frequency of the responses by customers.

Techie Co.

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ALWAYS THERE FOR US

Customers feel that Techie Co. is ultra-reliable, responsive, and quickly on top of issues when they happen. Many customers also feel Techie Co. can scale as their business scales.

KEY VOICES

Very responsive

An extension of our team

Grows with us

Proactive / thinks ahead

SELECT QUOTES

I just think that they're reliable, available around the clock. In a production facility like ours, we have some pretty hard deadlines and if something's broken we need immediate assistance. And they always seem to be available either remotely or they'll come to our office and handle our need.

So that group really is, it's an extension of our team, but they've got the server guys, I don't, they've got the network guys, I don't, they've got the architect guys, I don't, they've got the 24x7 NOC, I don't, they have the licensing experts, I don't, they've got the procurement team, I don't..

What Techie Co. brings to my piece of comfort zone is that they have the ability to grow and modify with us, so if we double in size I know that Techie Co. is going to be there to be able to double with us, not necessarily double their company, but double the services that they have.

We were dealing with a phishing thing that was running rampant through our whole system. And we were getting ready to get on the phone with Techie Co. to start working through, and 30 seconds later, before I had a chance to pick up the phone, Matt was calling me to talk about it.

Techie Co.

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Where to Find the Course Materials

Here → https://csquarede.com/masterclass

https://csquarede.com/masterclass

cSquaredE

Strategy, Marketing, Business Development and M&A Consulting for Technology Companies

Masterclass: Gaining Market and Customer Insights through In-depth Interviews

A critical role 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 buyers, potential buyers, or other market experts. Interviewing people effectively is a skill that takes practice, and extrapolating the key takeaways from the interviews should follow a defined process, to ensure efficiency and actionable next steps.

Chad Eckes has taught a six part masterclass on this topic for Pragmatic Institute™, stepping through an actual research project, highlighting tools and processes employed, and sharing the resulting deliverables. The videos and files below make up the masterclass, and are being made available to anyone who wants to learn a methodology for performing effective in-depth interviews.

Part One: Define Scope, SCQH & Issue Tree



Masterclass Overview and Syllabus

Part One Slide Presentation

SCQH and Issue Tree Templates

Other Reading

Part Two: Describe Personas

Questions?

Course Materials: https://csquarede.com/masterclass

Chad's Contact Info: chad.eckes@csquarede.com, (508) 667-3890

Thank You

Course Materials: https://csquarede.com/masterclass

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