

# Gaining Market and Customer Insights through In-Depth Interviews



Week One



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## 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 Syllabus

Week	Learning Objectives	What You Will Learn	Attachments	Assignment
→ 1	<p>Define the scope of the research project</p> <p>Create an issue tree</p>	<ul style="list-style-type: none"> <li>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</li> <li>Definition of an issue tree, how to construct one, and what level of detail to include at this stage</li> </ul>	<ul style="list-style-type: none"> <li>SCQH article</li> <li>Issue tree example</li> </ul>	Create SCQH and issue tree
2	Describe the target personas	<ul style="list-style-type: none"> <li>How to create persona profiles, and how to prioritize which persona(s) should be targeted for research</li> </ul>	<ul style="list-style-type: none"> <li>Persona templates</li> </ul>	Create persona document
3	<p>Create an interview guide</p> <p>Recruit customers for the research</p>	<ul style="list-style-type: none"> <li>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</li> <li>Methods for identifying, soliciting and securing agreement from your interviewees</li> </ul>	<ul style="list-style-type: none"> <li>Interview guide example</li> </ul>	Create interview guide
4	Conduct phone, video or in-person interviews	<ul style="list-style-type: none"> <li>How to prepare for a good phone interview, as well as processes and technologies to help them be successful</li> </ul>	<ul style="list-style-type: none"> <li>Best practices when conducting an interview</li> <li>Recording of past interviews</li> </ul>	5-10 minute audio / video recording of a mock interview
5	<p>Analyze interview transcripts</p> <p>Identify recurring themes, voices and key takeaways</p>	<ul style="list-style-type: none"> <li>The value of recording and transcribing interviews, and a method to identify the right data contained in the interviews</li> <li>How to "boil the ocean" and pull-out the most-important messages from the body of interviews</li> </ul>	<ul style="list-style-type: none"> <li>Transcript examples</li> <li>Affinity diagrams</li> </ul>	Read three transcripts and develop an affinity diagram
6	Develop a report of the research	<ul style="list-style-type: none"> <li>Common report templates and storylines, and how to frame the results appropriately for the audience you're presenting to</li> </ul>	<ul style="list-style-type: none"> <li>Final report examples</li> </ul>	Slides or document summarizing market intelligence gleaned from research

# Project Background – Techie Co.

## Company Profile

- Middle-market regional IT services company
- Services include:
  - Application and website hosting
  - On-site hardware / desktop support
  - IT help desk (e.g., phone support, online help, troubleshooting)
  - Network installation and configuration
  - Information security audits and improvement projects
- Customers span a wide variety of industries (e.g., financial services, brick-and-mortar retailers, software companies, manufacturers)
- Pricing is all a la carte; customers pay month-to-month only for services they consume (i.e., no long-term contracts / retainers)

## Problems

- Competitive market with numerous players
- Difficult to stand out from the crowd
- Inexperienced sales managers that struggle to close new business
- Really old website and stale marketing materials
- Small marketing department
- Uncertain how to position themselves and how to communicate their value



# Where to Start? How can the product manager help?

- When faced with a wide variety of problems that need addressing, a product manager 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, PM's needs 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 describes a problem (situation, complication), frames a question about what to do, and finally offers a solution in the form of the hypothesis.

Situation	<i>Where are we now? What's the context?</i>
Complication	<i>What's the problem? What's not working?</i>
Question	<i>What do we need to work out? What can we do?</i>
Hypothesis	<i>What we propose to do to solve the question.</i>



# Techie Co. 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

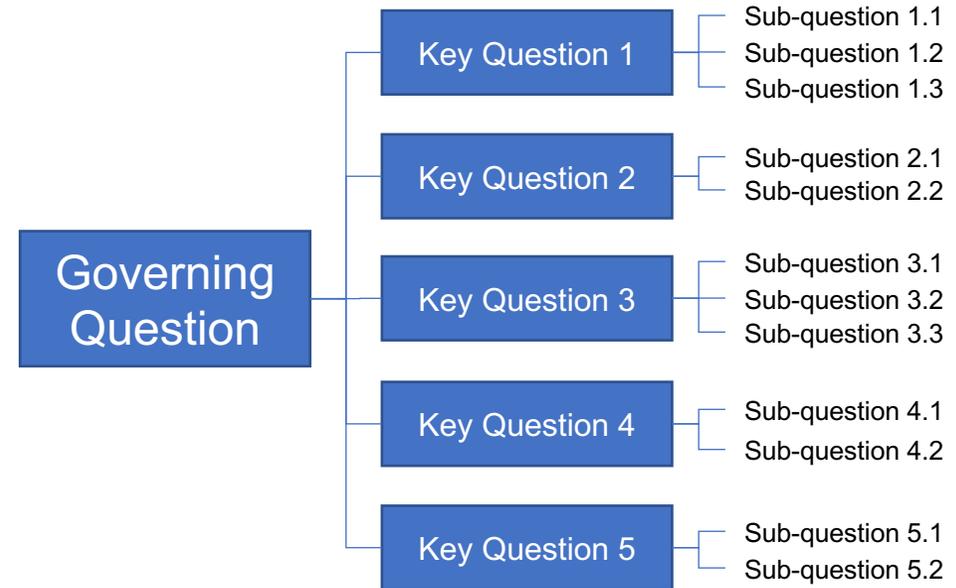
What is the *optimal positioning* for Techie Co.?

## 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.

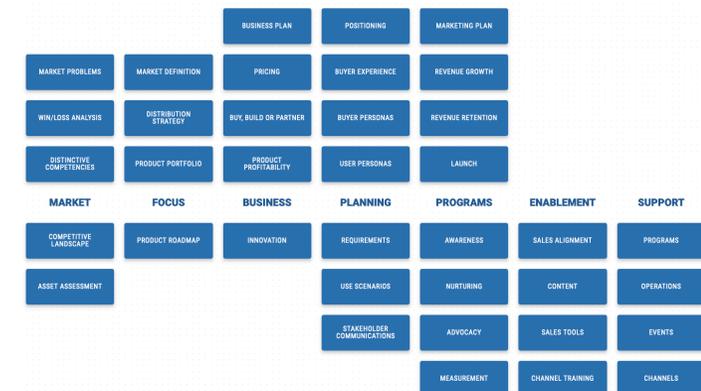
# Underpin the SCQH with an Issue Tree

- 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

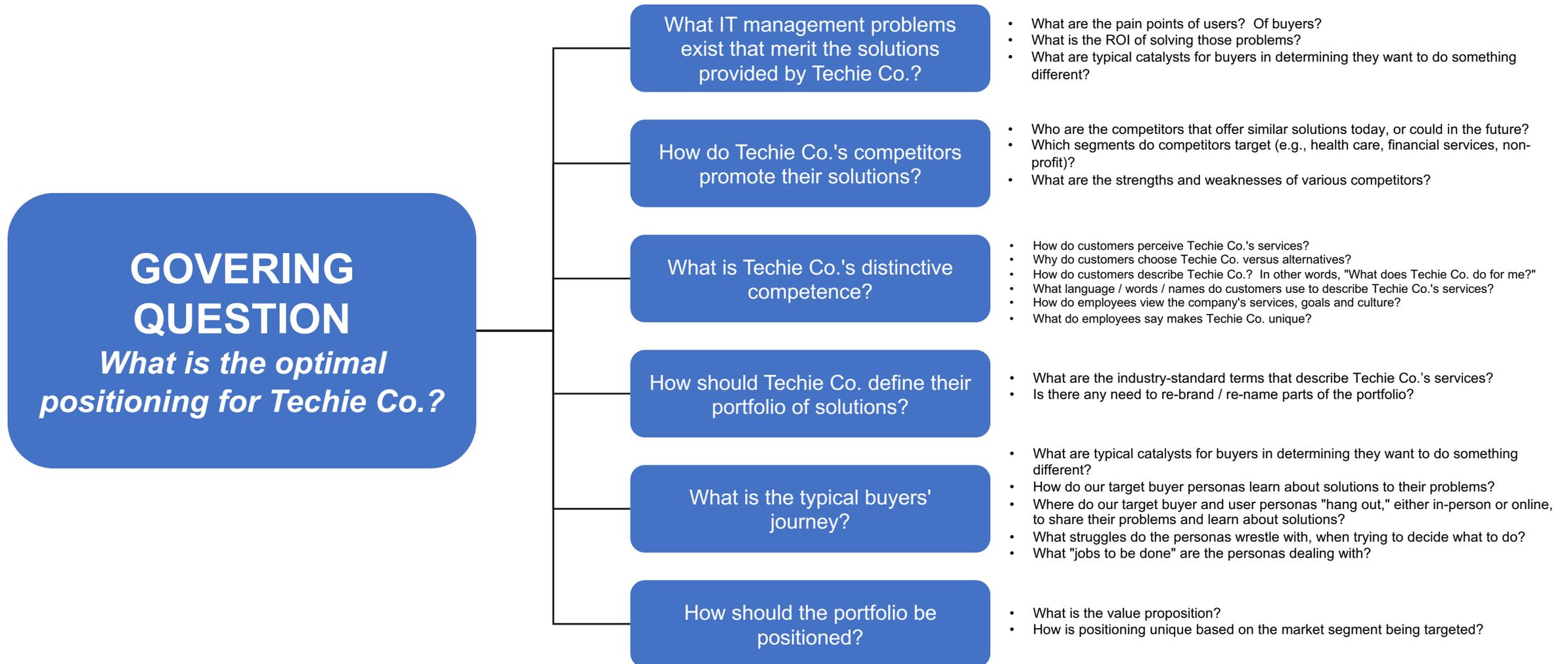


# Considerations When Constructing the Issue Tree

- Method One
  - Start by listing out 4-8 key questions that you feel get you part of the answer to the governing question
  - Then, come up with 3+ sub-questions that underpin each key question
- Method Two
  - Sometimes it helps to just and write down a bunch of questions you have, and then try to organize them into the issue tree later
- If you get stuck, think about marketing frameworks to help generate questions
  - The Pragmatic Framework!
  - The four P's (product, price, placement, promotion)
  - SWOT (strengths, weaknesses, opportunities, threats)
  - Jobs to be Done



# Techie Co. Issue Tree



## Benefits of SCHQ 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 (see Week Two)



# Your Week One Assignment

- Develop an SCHQ and Issue Tree for a research project that would center on in-depth interviews
  - Can be interviews with customers, prospects, users, buyers, market analysts, or even your own team members
  - Can be for a past situation you encountered, one you are planning soon, or one you'd like to perform but need to get approval for
- Don't fret too much about details
  - PAC members in this course will provide input/feedback
  - You will likely come back to it later in the course to refine it
- Post to the Discussion Group by Monday January 18 at 12:00 PM Pacific
- Review at least one other member's SCHQ and issue tree and provide comments/feedback



# Thank you and have fun!

