CUSTOMER CONVERSATIONS

5 Steps

Amy Mitchell | amycmitchell14@gmail.com
https://amycmitchell.substack.com/

Table of Contents

SETTING UP CUSTOMER CONVERSATIONS

Product leaders crave customer feedback to provide the best product experience to their customers. How do you squeeze in meaningful customer conversations into your busy work week?

COMPELLING QUESTIONS

Driving to meaningful customer conversations takes a bit of thought and preparation. For example, a few customers have asked about a major product change such as automatic software updates. How can you get meaningful information about this request from your customers?

Start with a list of compelling questions for discussion. Customers that want to influence your product direction will respond well to open ended questions. Seeing that you are giving serious consideration to their requests demonstrates that you plan to take action to provide product improvements that save their time.

For a major change such as automatic updates, some examples of compelling questions would be:

- What prompted this request in your organization?
- In what ways will automatic software updates save time in your organization?
- Can you walk through an example of how you do updates with the current product?

Next, prepare a list of customers to contact about these questions.

FINDING THE CUSTOMERS

There are two ways to find customers for meaningful conversations:

1. Pull from your customer list based on key characteristics.
2. Provide the key characteristics to your product's sales team to find customers for your conversation

On both cases, you prepare a list of customer characteristics. Some typical customer characteristics for a meaningful conversation are:

- Customer segment by size of customer or products used
- Role or title of the customer contact
- Geographic location of the customer
- Purchase history
- Feature usage
- Feature requests
- Customer's estimated annual budget

With the characteristics of your ideal customer for your compelling questions, then you can start building a list of customers.

Pull from your customer contact list

Using the customer characteristics, you can create a database query and create a list of customers. Be sure to only contact customers that have indicated contact is allowed.

Next contact the sales leads for each potential customer and check if there are any customers that should not be contacted. For example, if the customer is in the middle of a re-org, then the timing of your questions might be bad.

Then send an email to the customer contacts with an overview of the questions and tell them the benefits of speaking with you. Make it easy to say YES to your request!

Sales team finds your customer contact list

Using the customer characteristics, contact your sales team to find customer contacts that fit your characteristics. When contacting the sales teams about customer contacts, give the sales teams an easy way to contact their customers with your request.

Before contacting your sales team, prepare a short email request to them:

- Why you want a customer conversation and how this conversation will make the product better for customers
- Summary of your ideal customer characteristics
- An email attachment for each potential customer that gives an overview of the questions and the benefits of speaking with you.

Then send an email to your sales team.

In both cases, communicate your deadline for their feedback to be considered for the next product iteration.

HOLD THE CUSTOMER CONVERSATION

Notes from Customer Conversations

Record the customer conversation and write summary notes afterwards: The notes from the customer conversations are helpful in many follow-on activities:

- Writing requirements
- Prioritizing ideas for further investigation
- Estimating business cases
- Updating product strategy
- Competitive analysis
- Customer references
- User experience and workflow improvements

Key items to include in your notes are:

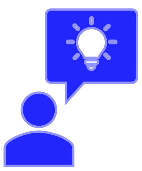
- Name and title of the people in the customer conversation
- Background about how the customer is using your product, for example:
    - scale of use such as number of users, size of storage, number of licenses
    - frequency of use such as daily, weekly
    - customer segment such as small business, retail, or enterprise
- Screenshots of issues discussed in the walk through
- Answers to your questions
- Side issues raised

Save the notes in a shared folder so other product team members can make use of the customer conversation notes. However, don't blast your notes out to the product team! Prepare a summary first.

SUMMARIZE THE CONVERSATION

After completing 3-5 customer discussions, the next step is consolidating your notes into a table to communicate a summary. Below is the table from the example customer conversation about automatic updates. This table shows the key points from 5 customer conversations.

Customer Name	Number of instances	Size in Users	Drivers for auto updates	Time savings with auto update	Today's workaround
Jones Law	10	5000	• Small IT team has trouble scheduling update jobs	4 hours per update once a month	Maintain a script for updating
Acme Global Enterprise	1500	50K	• It takes a week to update all the instances • Sometimes must skip an update	40 hours per update	Have one person dedicated to updates
Regional Retail Outlets	20	100	• Difficult to schedule downtime for update jobs	Minimal as updates are not happening	Avoiding updates
City of Springfield	10	1000	• Low priority for one IT person	Minimal as updates are not happening	Avoiding updates
Large Health Care	100	10K	• Want to reduce number of extra tablets going offline for updates	40 hours per week	Have one person to rotate spare tablets



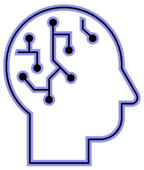
Analyzing the customer conversations

By consolidating the customer conversations, you notice these drivers for automatic updates:

- customers are not keeping your software current
- customers are putting in extra effort to handle updates
- larger customers have developed scripts to save time

With these drivers in hand, the next step is to characterize the customers' problems that could potentially be solved with automatic updates.

CHARACTERIZE THE CONVERSATIONS



After the customer conversations, your first thought might be to email the summary table and the recorded conversations to your engineering leads. This is a bad idea because you haven't added your product manager thoughts. It would be much more useful to the engineering leads to get a story about the struggles your customers are having in manually updating your product.

Since you recorded your customers walking through their updates of your software, your next step is building a story to summarize what your customers are doing to keep your product up to date. A thoughtful summary of the customer conversations is much more valuable to your limited engineering team. How do you build a story about the customer conversations and get the attention from your engineering team?

THE POWER OF STORYTELLING

A good story has the following parts:

- a setting about the current situation
- description of a problem or conflict
- a resolution to the problem

The way to turn your customer conversations into a story is to pull out the moments that matter.

YOUR CUSTOMER CONVERSATION STORY

Use your customer conversations to tell the consolidated customer story. A potential outline of the story of the automatic updates example is:

The current situation

Interviewed a subset of customers about how they update their software
Found the following issues:
- Delaying updates
- Extra effort to make the updates
- A few customers have scripts to help in updates

Customers do see value in keeping software current and looking for better ways to keep software updated

Describe the conflict

Introduction of the typical person updating your software
Walk through what they do with screenshots
- Preparation for the updates
- Doing the updates
- List of scripts and other aids the customers have developed

Point out a few key issues from the customer's perspective

Discuss possible resolutions

Summary of the story
Request engineering to explore possible solutions with you
List of next steps such as next meeting, customer analysis, estimation of effort

The focus of the story is your customer's pain points. The focus is *not* on agreeing to do automatic updates. In fact, the above outline doesn't mention automatic updates. This is your opportunity to present the customer's perspective and enable engineering to consider ways to help the customer.

PRESENTING THE STORY

Prepare to present the story about how customers update your software to small groups so your team can ask a lot of questions. The outcome you want is a lot of questions and discussion about possible solutions.

The result of presenting the customer conversations usually goes one of these ways:

- Engineering team believes the problem is not bad enough to make a change
- Engineering team has a great idea to address the problem quickly
- Only way to fix the problem is big effort

Any of these responses is good. Why? Because you and the team decided how to respond to a customer issue.

CLOSURE

With a decision about handling this batch of customer conversations, you need to finalize documentation from the customer meetings. The summary and the detailed meeting notes go into your prioritized list of improvements.

Additionally, you need to update your customers about the outcome of the customer conversation. For example, if it is going to take a while before anything can be done about automatic updates then you can thank the customers for the conversation and let them know that their feedback was reviewed with the team. If there is something valuable to the customers coming soon, then you can let customers know that an improvement is planned.

CONCLUSION

Steps to Meaningful Customer Converstions

1. Prepare
2. Customer Q&A
3. Summarize
4. Present
5. Close

The next time you need to talk to your customers about an issue, you have a new way to do it in a few steps:

a. Preparing to speak to your customers
b. Hold the customer conversation
c. Summarizing the customer conversation
d. Presenting the customers' perspective to your team
e. Closing on the customer conversation

Breaking down customer conversations into discrete activities enables you to tackle a major issue with minimal impact to your busy schedule. Each step in the customer conversation has small product management thought exercises. These activities can be done with small amounts of time spread over a few weeks.

For more product management tips, please visit Product Management IRL

https://amycmitchell.substack.com/