

CUSTOMER INSIGHT METHODS

Used to build confidence in your product or service

HOW TO USE THIS GUIDE

1. Take time to read the method summaries across the 3 phases below.
2. Note the effort-sizing guidelines at the base of this map; agree an ambition with your teams.
3. Use the accompanying Method Map postcards to better understand the effort and inputs required.
4. Use the postcards to plan out a method 'recipe' that suits the goals and stage of your project.
5. Use the picture references on the postcards to identify the associated books supplied. Use these books to understand how to apply the methods in your projects.

TOP TIPS

It's better to try and understand your customer than do nothing at all.

There is no perfect method. Combine several to overcome the flaws with each.

Build a rich picture from a few people, then quantify the key things by surveying lots more.

Keep your customer in mind and map out the experience you want them to have.

Build a prototype to flush out how your idea will work.

Test your prototype as soon as you can, so you can see how it's used and improve it.

Caution: treat these resources as a guide, not a recipe for perfection. There's more to the methods than any short postcard could capture.



1. RESEARCH

Find out what people want

2. DESIGN

Create experiences they will enjoy

3. TRIAL

Make sure they work well in real life
(see what people do, not what they say)

1.1 Understand a few people well (in a research setting/at home, with others/alone)

Results are highly descriptive and help you develop your ideas. You need quantitative research to see how these ideas generalise in the wider population.

1.1.1 Interviews

Learn if people find an idea appealing, what they say they do and why. Structure conversations so they focus on the areas of interest.

££ Med Weeks Small

1.1.2 Ethnography

See what people actually do, in real life. Visit someone at home to see how they cook their dinner and use their heating. Go for a drive with someone to see how they use their electric vehicle.

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1.1.3 Focus Groups

Sit behind a one-way mirror and hear what a group of people think of your idea. Show them stimulus to help them understand what it is and how it works.

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1.2 Quantify how many share the same view (surveys)

Quantitative research can show how many people share the habits, attitudes, opinions and unmet needs revealed by qualitative research. Results from a sample of consumers are designed to be statistically representative of a wider population.

1.2.1 Survey

Compare what different people think of your idea, what they say they do and why. Quantify your market. You can run them quickly online or cheaply by adding questions to a regular (omnibus) survey.

££ Med Weeks Small

1.2.2 Segmentation

Group similar people so you can tailor offers they'll like. 'Golden questions' can identify what 'segment' someone is in, so you can target your offer.

££ Med Months Med

2.1 Remember your customer

Don't fall into the trap of thinking loosely about 'the consumer'. Use evidence to group them into similar segments. Bring them to life with personas. Your team will create better solutions if they understand their customers.

2.1.1 Personas

Caricatures of customers who are similar in important ways. Examples are often illustrated and given names to make them memorable.

£ Low Days Small

2.2 Map out their experience and how you'll deliver it

Think about what your customers have to do to enjoy your solution. Do they have to fill in lots of forms, endure many visits to their home, or wait on the phone to solve problems? Minimise and simplify the steps they have to take to enjoy your solution. They are less likely to bother if it takes a long time or is difficult.

2.2.1 Design Sprint

Start by checking you are creating something valuable. Reduce the risk your new product or service will fail by building and testing a prototype.

£ Low Days Small

2.2.2 Value Proposition

Check customers value your offer before spending too much time building it. Remember customers want benefits, not features. They might buy solar panels to save money and cut carbon, not because they want something on their roof.

££ Med Weeks Small

2.2.3 Service Blueprint

See the steps needed to make sure customers enjoy your product or service. There may be many ways that customers discover and use it (customer journeys). The blueprint should capture what every party needs to do to deliver a positive experience.

£ Low Days Small

2.3 Create low/high fidelity prototypes

Give customers prototypes of solutions to find out if they enjoy using them. The earlier you get feedback the more time and money you can save developing the wrong thing. So it's worth starting as early as you can with simple (low-fidelity) prototypes.

2.3.1 Low-Fidelity Prototype

Create simple mock-ups of solutions you can use to check people can easily complete key tasks. Even simple paper sketches can flush out problems to fix or give you confidence your ideas will work.

£ Low Days Small

2.3.2 Co-creation

Design solutions with your customers either in workshops (or less often, online). Brief them on your challenge, listen to their ideas and enlist their help as you progress.

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2.3.3 High-Fidelity Prototype

Build fully-working replicas of products or services to prove they work in reality. Simulate them well enough to learn what they cost to deliver and how they feel to use.

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3.1 Check people can easily use your product or service to do what they want

No one enjoys using products or services that make it hard to do what they want. Check how easily people can use yours and how you can improve it. This can help you rethink an early concept before spending too much developing it, or make sure your product or service is the best in its class. It's a lot cheaper than answering calls from confused customers, or withdrawing a bad product from the market.

3.1.1 Usability Testing

Give designers information they can use to design delightful experiences. Collect metrics to check people can easily use your product or service before you launch it.

££ Med Weeks Small

3.2 Find out how to improve your product or service by seeing what people like or hate when they use it

Life is busy, so people forget tiny details. But tiny details matter. If you want to create experiences your customers will love. Watching how people use your product or service in real life shows you how to improve it.

3.2.1 A-B Testing

Compare two alternative designs to see which is best. Often used to decide how to draft an offer, or lay out a website. Works by showing two groups of people one option each to find out which produces better results.

££ Med Weeks Large

3.2.2 Diary Study

Historically based on recording diary entries, for instance about what they like and hate. Now refers to a family of approaches that record peoples' everyday usage experiences.

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3.3 Show how well it works in the real world

In the end, there's no substitute for launching something and seeing how well it flies. Trying things out in the real world shows you how well they work. Trials let you check your product or service works as you expect before you unveil it to the whole market.

3.3.1 Soft Launch

Let a small group try your new product or service to check it works. Stress tests every aspect of your offering from supply chain to customer support. Fine tune your operation before opening your gates to the rest of the public.

££ Med Weeks Small

3.3.2 Sensor-enabled

See beyond what people say using data that shows what they did. It is hard for people to say how they use energy because they do it as a bi-product of daily life, not a conscious choice. You can use monitoring and user interface logs to see how people use energy instead.

£££ High Months Sml-Lrg

3.3.3 Models

Draw broader conclusions from your narrow study. It is hard to relate what people do to the rest of the energy system. Models relate behaviour to heating systems, energy supplies, charging infrastructure and energy networks.

£££ High Months Small

PEOPLE LAB

CATAPULT Energy Systems

WHICH SHOULD I DO?

SUPER-LEAN

SAFER GROUND

BEST-IN-CLASS

The diagram shows three horizontal paths of method combinations:

- SUPER-LEAN:** 1.2.1 Survey → 2.1.1 Persona → 2.2.3 Blueprint → 2.3.3 Hi-Fi → 3.1.1 Usability → 3.3.1 Soft L
- SAFER GROUND:** 1.1.1 Interv → 1.1.3 Focus → 1.2.1 Survey → 2.1.1 Persona → 2.2.1 Sprint → 2.2.3 Bluepr → 2.3.1 Lo-Fi → 2.3.3 Hi-Fi → 3.1.1 Usability → 3.3.1 Soft L → 3.3.2 Sensor
- BEST-IN-CLASS:** 1.1.1 Interv → 1.1.2 Ethno → 1.1.3 Focus → 1.2.1 Survey → 1.2.2 Segm → 2.1.1 Persona → 2.2.1 Sprint → 2.2.2 Value Pr → 2.2.3 Bluepr → 2.3.1 Lo-Fi → 2.3.2 Co-create → 2.3.3 Hi-Fi → 3.1.1 Usability → 3.2.1 A-B → 3.2.2 Diary → 3.3.1 Soft L → 3.3.2 Sensor → 3.3.3 Models

MANAGE YOUR RISKS

SUPER-LEAN We don't have much time or money so we're doing the minimum. We're soft launching to check customers want what we've built. This could end up costing us (in returns or complaints).

SAFER GROUND We can't afford to launch without some evidence customers want what we're selling. We saved some time and money to be first to market. Chances are we could have spent less or been more rigorous.

BEST-IN-CLASS We're known for being thorough. We only develop things that we're confident users will want. We risk spending too much or being late and losing market share.