

How To Guide Series

# 11 Step Guide

to capturing customer insights  
and developing great messaging

**Capturing Customer Insights:** The key to messaging success is getting access to the customer insights that lie inside the heads of subject matter experts within your firm – and then validating these insights with customers.

**Structured Process:** Your experts, typically in product management, implementation services and sales, are busy and sometimes impatient people. So putting in place a structured and repeatable process to get input from them in a fast and efficient way is crucial.

**11 Step Methodology:** We have developed a structured process for capturing customer insights and developing great messages – based on what we've learned from completing hundreds of messaging projects over the last 15 years.

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## Step 1

### Put the stakeholder team together

#### Internal Subject Matter Experts:

- Get commitment from subject matter experts and their managers to participate.
- Typically the 'stakeholder team' will come from product and proposition management, from internal industry experts, from sales leaders, and other customer facing roles.

#### Partners:

Leverage partners and relationships with industry analysts.

#### Buy-In:

- Identify a core group to attend Customer Insights workshops and one-on-one sessions.
- Leverage a visual representation of the workshop process to brief the team (see Figure 1 as an example).

#### Project Management:

Put in place a timeline for the project, and determine who will be responsible for creating and managing the process, interviewing customers, and creating deliverables.

*Typically the 'stakeholder team' will come from product and proposition management, from internal industry experts, from sales leaders, and other customer facing roles.*

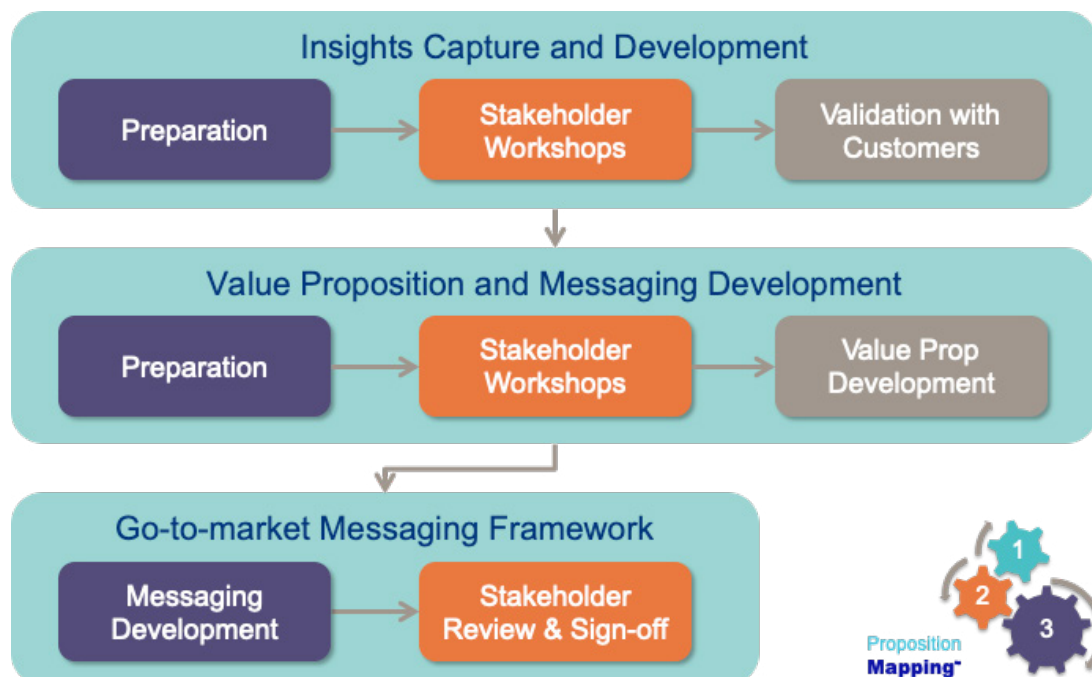


Figure 1: Capturing and developing insights and messaging



## Step 2

### Specify the market and customer insights to be captured

#### **Determine Focus Area:**

Define the areas of insight to be captured. For example:

- The primary market themes and drivers in the markets your target customers operate in
- The way businesses are structured and the departments of interest to us

## Step 3

### Determine the personas and workflows to be addressed

#### **Personas:**

Define the buyer personas i.e. the decision makers, influencers and users of your products

#### **Business Activities and Workflows:**

Identify the customer business activities where your proposition is designed to play and describe the most important workflows in a couple of sentences.

## Step 4

### Identify and recruit customers for research

#### Contacts:

- Research contacts at customer and prospect organizations who may have the necessary knowledge to validate your thinking on business challenges.
- Ask the sales team for their help in securing customer conversations.

#### Design Interaction:

Design methodology and supporting materials for research calls, round table discussions, etc.

#### Initiate Contact:

Make contact with customers to get their agreement in principle to take part in the research, later in the process.

## Step 5

### Build a customer insights hypothesis

#### Research:

Mine existing materials (e.g. collateral, slide decks, white papers, guides), undertake web research and extract relevant ideas and insights.

#### Hypothesis:

Build a hypothesis consisting of:

- Market themes and drivers
- Persona profiles
- The business challenges and opportunities companies face in the business areas and workflows you address

#### Content Management:

Put in place tools to capture, organize and share insights gathered in workshop sessions. These maybe a simple Word document, Excel sheet or PowerPoint deck or a specialized messaging platform (see Figure 2).

#### Pre-Read:

Send the hypothesis to stakeholders in advance of the workshops sessions as a short Pre-read document.

*When you're thinking about new markets or simply want to validate long held views on customers and why they buy your solutions, you need to talk to customers and prospects.*

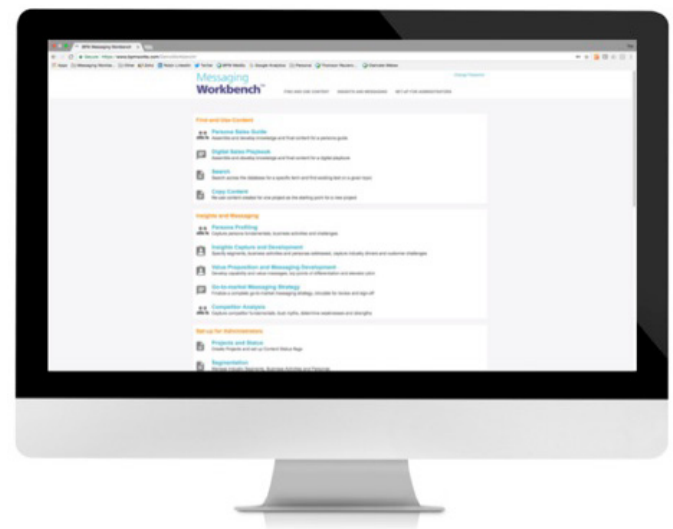


Figure 2: Cloud-based Messaging Workbench tools



*Understanding the forces driving change in markets, and the opportunities and challenges faced by customers, is the foundation for effective value based selling.*

## Step 6

### Run Customer Insights workshops and one-on-one sessions

#### Structure:

- Provide an agenda for the meeting and publish this in advance so attendees know there is going to be a process.
- This will make it easier to keep the session on track, focusing people on the customer and their challenges, and guiding them away from discussions on product features.

#### Market Themes:

- Start the sessions with Market Themes to get the team thinking about what's driving change and investment at the customer – as opposed to starting from product capabilities and why customers should find them valuable!

#### Customer Challenges:

- Stay focused on customer challenges within the scope of the workflows you serve.
- First think about the challenge itself i.e. the problem the customer has to solve or the opportunity they want to take advantage of.
- Then try to articulate exactly what the pain is they feel or the upside if it's an opportunity.
- Generally it's best to focus on one persona or workflow at a time and really try to get into the mind of that person and work through the 2 or 3 most important challenges they face.

#### Facilitation:

- For a workshop with more than 2 or 3 attendees you'll need two people to facilitate – one to run the room and a second to capture output as the session proceeds.

#### Buy-In And Alignment:

- Share what is being captured as you go along on flip charts or from your laptop using a projector so you can continually ask the group, "Did we get this right? Have we captured the essence of what you're saying?"
- Sharing output with the group as you proceed also means people leave the session aligned.



## Step 7

### Validate insights with a small group of customers

**Prepare Materials:**

Modify the internally generated customer insights and create the materials that will support a guided conversation with customers.

**Before the Session:**

Send out pre-session materials.

**Running the Interview:**

- Use your supporting materials to ensure you get input and feedback for every customer business challenge you want to test.
- Don't forget to get the customer to talk about the pain they feel in relation to each challenge – it's common for a customer to confirm that they do face a particular challenge but then to go on to say they have a way to deal with it and it's not a big problem.

**Probe:**

- Also make sure you ask the customer to provide suggestions for other challenges internal stakeholders may not have thought of.
- This is a highly valuable process for the company – often resulting in new insights to guide product and proposition development going forwards.



## Step 8

### Update insights based on feedback from customers

**Analyze:**

- Process and aggregate the output from the customer conversations to validate, augment and change internally generated customer insights as necessary.
- Retire business challenges where these are not supported by feedback from customer interviews.

**Prioritize:**

Mark each confirmed business challenge as high, medium or low depending on the level of pain/opportunity expressed by customers.

**Gaps:**

- Identify any internally generated Insights not yet tested or where responses conflict and determine whether further research is required.
- Schedule and conduct follow-up calls as necessary.

**Report:**

Finalize Customer Insights and formalize in a document.



## Step 9

### Mine existing materials to prepare potential value propositions

#### Research:

Mine existing materials (e.g. collateral, slide decks, white papers, guides) and extract product, service and company capabilities that may address identified customer challenges and opportunities.

## Step 10

### Run proposition mapping workshops and one-on-one sessions

#### Workshops:

Run workshops and one-on-one sessions to map your proposition to the business challenges customers face (see Figure 3).

#### Capabilities and Value:

- Taking each business issue in turn, create a statement that explains how a particular company, product or service capability addresses the issue.
- Develop a powerful value message that sets out the benefit to the customer.

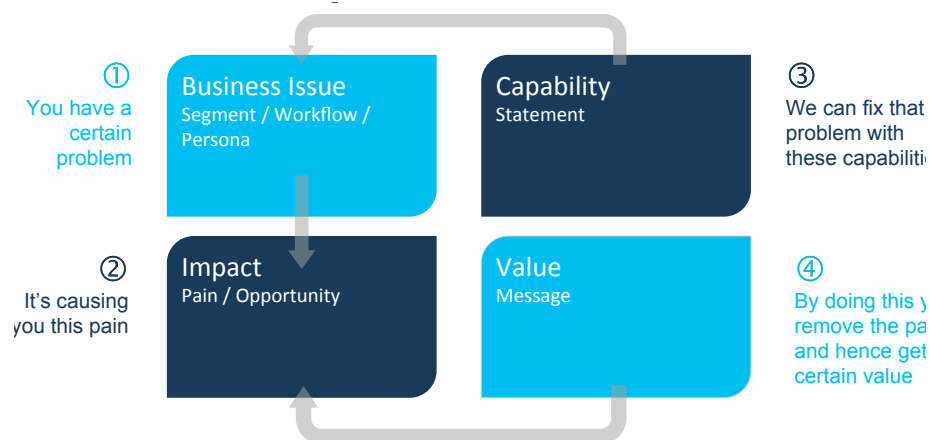


Figure 3: Anatomy of a value proposition

#### Differentiation:

- Analyse the Capability Statements you have developed and identify capabilities your company offers that are particularly strong or differentiated.
- Develop language to articulate top points of differentiation in a clear and powerful way.



## Step 11

### Produce Messaging Framework document and get sign-off from stakeholders

#### Finalize Insights and Messaging:

- Process the 'proposition map' built in Steps 1 to 10 to develop the messaging framework for the proposition.

#### Content Structure:

Typically a Messaging Framework will cover:

- Market context – key themes that are driving opportunities and challenges for customers.
- Business activities / use cases – the main customer business activities served by the products.
- Personas – who the target senior decision makers, influencers and users are.
- Key business challenges / opportunities – the business issues and impacts that are top of mind for each target persona.
- Capabilities – the capabilities the products have to address the issues customers face.
- Value messages – how the products deliver value to the target personas.
- Differentiation – reasons for customers to choose your company over competing options.
- Elevator Pitch – articulation of the market context and key challenges, value delivered by the products, positioning and differentiation.

#### Sign-Off:

- Issue the Messaging Framework document to key stakeholders for review and comment.

# BPMWORKS

BPM provides a methodology and expert services for capturing customer insights and developing go-to-market messaging for B2B propositions.

We also create interactive sales playbooks, learning content and activation programs for sales enablement.

Customers include ICE Data Services, LexisNexis, Reed Business Information, LSEG Refinitiv, Intertrust, Lumen and Zellis.

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