



# Creating Customer Insight Course Online

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## Overview

The 'Creating Customer Insight' program is comprised of six mini-courses, each of which tackle a different aspect of creating insight about customers in highly uncertain contexts. Each segment is meant to be consumed at your own pace. They're typically short video explainers with some text and often a download for a deeper dive. The design of the course is meant to be used at work, not require you to allocate massive amounts of time for training.

[Click here to watch a video explainer introducing the course content.](#)

The course also gives you access to explainer videos and over 25 downloads of tools, guides, spreadsheets and other useful material you can put to work immediately.

## Introduction to Discovery Driven Planning

This mini-course gets right to the fundamentals of how to deal with the levels of uncertainty and complexity that we are all facing today. In it, you'll learn how discovery driven planning is different than what you might be used to when it comes to planning, how to drive your plans through key checkpoints, how to use a "BareBones" net present value calculator to put some numbers behind your assumptions, creating a "reverse" income statement, and how to review what you are learning in a psychologically safe way. You'll also have the opportunity to drop in on an interview I did with Gary Kearns of Mastercard, who credits the approach with driving double-digit growth in its Information Products division.

When you have completed this module, you will be able to:

- Establish success criteria for an uncertain opportunity
- Define and quantify your assumed business model
- Create a 'reverse' income statement
- Conduct competitive and market benchmarking analyses
- Document your assumptions in order to test them
- Plan and budget around key checkpoints

## Initial Customer Interviews

While talking to customers might seem like a pretty simple task, there are a lot of ways to get it wrong. In this course, I'll be introducing the concept of customer "jobs to be done" to help reframe the way you might be looking at your products and services. We'll look at smart (and not so smart) ways of doing interviews. We'll look at experimentation as core to rapid learning by formulating testable hypotheses and running multiple experiments. And finally, we'll talk about surveys, why so many of them yield zero insight and how to do better.

When you have completed this module, you will be able to:

- Explain the concept of jobs to be done
- Use jobs to be done thinking to structure exploratory interactions with potential customers

- Design meaningful customer interview protocols
- Use the downloadable interview templates in your own work
- Articulate your hypotheses in a testable way
- Design hypothesis tests
- Create surveys that provide meaningful insights

## **First prototype and technical feasibility**

Until you have a customer actually experiencing some aspect of what you will be trying to sell them, you are missing out on vital information. The purpose of a prototype is to provide something that is an early vision of what the ultimate offer could be that gives you clues as to what customers really want and will pay for. In this course, we'll cover the basics of doing prototypes, specifically how to run an experiment in business and the underlying process of design thinking that lies behind the prototyping method.

When you have finished this module, you will be able to:

- Describe the design thinking process
- Explain why prototyping is useful in the customer discovery process;
- Create a few initial prototypes of your own
- Conduct an experiment to test a specific hypothesis
- Create a deliverables specification for your project.

## **Product Data and Digital Strategy Definition**

As more and more products and services encompass a digital dimension, you'll want to be thinking about the design of your digital data flows right from the beginning. Here, we're going to be talking about the fundamental positioning of your offering, taking you through a systematic way of discovering what your offer really means to which sets of customers. Then we'll explore digital ecosystems and new kinds of value being created through "interaction fields". We'll wrap up with how to use the discovery driven planning methodology for digital transformation, surprisingly high uncertainty efforts that can go grievously wrong.

By the time you have finished this module, you will be able to:

- Go beyond the catchall "positioning statement" to powerfully position your new offering;
- Explain why the shift to digital is a revolutionary, not evolutionary shift in how business is designed
- Map out your offerings' positioning on paper so that you can test it with users
- Structure a discovery-driven learning process that incorporates significant amounts of learning
- Exploit opportunities for fast and inexpensive hypothesis testing even in a digital sense.

## **Revised Prototypes**

So here's the thing - you KNOW your first version of anything isn't going to be perfect from the start. This course takes on the challenge of learning when things don't go as expected. We'll talk about learning from failures and the unexpected. We'll look at the evolution of prototypes as your ideas mature. And we'll give some guidance on when you have done enough learning that you can begin to make commitments to a particular design.

By the time you have finished this module, you will be able to:

- Create a contract for intelligent failure and use it with your team
- Differentiate between intelligent failures and the other kind
- Plan projects so that a surprise does not automatically get branded a "failure"
- Build a prototype
- Articulate and test a hypothesis using that prototype

- Develop a skin in the game caliper for your own new offering

## Customer segmentation testing

We all know about customer segments, right? Age, size, geography, and all those things. Well, guess what - most of these aren't really helpful in designing a truly innovative growth strategy. Instead, we'll look at segmenting on the basis of behavior - a core topic for understanding customer jobs to be done. You'll see how this was done during the famous customer centricity program at Best Buy. Then, we'll look at the entire customer journey using a tool called the consumption chain and the example of a bank frantically trying to understand customer experience in the early days of the PPP loan program. These are tools you'll use again and again.

When you have finished this module, you will be able to:

- Identify and avoid the trap of segmenting only on the basis of demographics;
- Use insight into customer behavior (based on the job-to-be-done idea we covered in a previous lesson) to identify what their main decision drivers are likely to be
- Map a customers' complete consumption chain and analyze where it breaks down
- Identify attributes and customer attitudes about them at each link of the chain, asking the question "how do we make this part of the customer experience better?"

## Beginning the journey

So, this is what we'll be covering in the entire Customer Insight program. Click here to access the Landing page for the course, and our other courses: <https://learninghub.valize.com/>

