

CUSTOMER OUTSIGHT®

Shift Your Perspective.
Find What Matters.



**How to interview customers,
find the truth,
and transform your business**

INTRODUCTION – SPECIAL DOWNLOAD

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Monticello Press

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ISBN: 9798294286736

Introduction: Customer Oversight Defined

Getting Your Bearings

Where are you, where are you going, and how will you get there?

These are questions you ask yourself every day in almost everything you do – usually without even thinking about it. These are also the three most important foundational questions for overall business strategy. How do you know which route to take without knowing the destination? And how do you even *start* unless you know where you are?

As a person, one of the best ways to figure out where you are is to look at a map. These days, that map is probably on your phone, but think of a big physical map at the entrance to a park trail or at the top of a ski resort. You know the big star that says, “You Are Here?” Finding that and looking at it in context of a larger view really helps, doesn’t it? In the moment, it instantly opens up the *next* part of the conversation, which is: “Okay, so if we’re *here*, we could go this way and it would take this long, or we could go *this* other way...but it would be harder. What are you up for right now?”

Companies should be having these conversations, too. If you only had one of those big trail maps or ski hill charts in your board room. Or an ocean map to show you the reefs, or a map of the stars that includes the constellations. But there’s no “You Are Here” in industrial chemicals, building materials, equipment, machinery, technology, professional services, or B2B software. There’s a lot of conference room chatter like “we *think* we’re here,” and a lot of overconfident sales forces claiming “Oh, trust me, I know *exactly* where we are.”

But where are you *really* within the landscape of your marketplace?

What's your *true position* in relation to your competitors – and how are you *really viewed* in the eyes of your own customers? That's what you should be desperate to discover.

Without a map, one of the best ways to get your bearings is to just ask your customers.

I'm not talking about an online survey, calculating Net Promoter Score, or doing traditional customer satisfaction measurement. I'm talking about good, old-fashioned conversations. I'm talking about in-depth *qualitative* interviews...to use market research terminology. These interviews can be short, long, in-person, on the phone, or on a videoconference platform; wherever and however they take place, they need to feel informal and less structured to really find the hidden treasure.

Almost every company claims they know their customers well. They'll often say they're doing Voice of Customer (VOC) research, but they're usually asking their salespeople, service force, or distribution channels to keep their ears to the ground and send back any useful information they hear. It's no surprise those sources usually report back that customers *love* the company. Sure, there's a hiccup every now and then on pricing, logistics, or delivery. But overall, the message is typically, "stay the course."

The truth is, most companies don't know how their customers really view them. Why not? Because they don't ask. At least they don't ask in the right way, under the right circumstances. They rely on anecdotal feedback from the field, use that to establish their "location" from which to navigate, set their course, and off they go – often in the wrong direction. Then they wonder why they're losing deals, why other companies are

stealing market share, or why their pricing power is going down while costs are going up.

That's what this book is all about. It's about getting customers to *really open up* and tell *the truth*. Only they can tell you what you need to know to draw the map for your company that says "You Are Here." The chapters and sections in this book focus on strategies for planning and conducting customer interviews, as well as analyzing and leveraging the results. The tagline for my own business is, "Study, learn, create, thrive." That's what I help companies do every day, and what I hope you'll be able to do much better after reading this book.

The Quest for Customer Oversight

Most companies claim to have "insight" about their customers. My view is that what most companies have is information they've gathered over time. They combine this information with ad hoc data about competition and trends and call it insight...as if it's something different than what every other industry observer could figure out. What most companies think is insight is nothing new, nothing unique, and nothing advantageous. It won't move the needle.

What companies really need is what I call "Customer Oversight®." Just imagine how most companies start the voyage of VOC. They get out their spyglass, extend the tubular lens, and peer through it. I can hear the company now, saying, "Ah, there's the customer. Let me look more closely at them. Let me study *all the details* about them. I'll ask them

questions about all the topics we've been wondering about. Very interesting. Just what we thought!" While you might get some insight, it won't be enough in today's business world. Most importantly, you, as a representative of your company, are still observing the customer from *your own* perspective. You're holding the spyglass and zooming in from *where you are* in market. You're looking more closely but still seeing what *everyone else* sees.

Customer Oversight involves shifting to the customer's perspective.

You're going to take that spyglass and, instead of looking through it yourself, hand it over to the customer. The customer's going to turn around and look through the spyglass *at you*. And when they're doing it, you're going to talk with them about what *they* see. You're going to ask them questions as wide as the ocean's horizon. And you're going to listen. Not listen for what *you* care about, but for what *they* care about. You're going to capture what they say in *their words*, the way *they say it*. You're going to hear the truth. And what you hear will put you on a path to transformation. What you're going to hear is what I call Customer Oversight. Not *our sight*, not *insight*. Oversight.

Insight Companies are always looking to transform *their own* companies – to transform *themselves*. Insight Companies want to make money and figure out how to do it successfully, most often by providing a product or service of *some* value to customers. The main objective of these companies is to provide a return on investment to their stakeholders, and this description applies to about 95% of the companies out there. Insight companies have their own interests first – even if they understand that in order to sell more stuff, they need to serve their customers' needs.

Outsight Companies seek to transform *their customers'* businesses as their top priority. These organizations might *look* like insight companies to the casual observer since they, too, sell a product or service into a given marketplace. But these companies, which may be 5% or less of firms out there now, have their priorities in a different order. Outsight Companies have decided to put their customers first. Truly first. Outsight Companies realize that the only reason they sell anything is to help with a job the customer is doing. . Whatever is sold is a means to an end. You're in business to help and serve your customers in *their* quest, not yours. If you can understand better what your customers are trying to accomplish, and if you can do a better job helping them accomplish it, they'll win the race *they're running*. And, as a result, you'll sell more, be more profitable and win the race *you're* running.

Outsight Companies have a culture of service that permeates every part of the organization. They're led by visionary servant leaders, think about the customers' challenges first, strive to assist them, and thrive in doing so. They attract talent more effectively and retain it more easily. They have better, more open relationships with their own suppliers, respect their competitors for what they bring to the marketplace, and contribute more authentically to their communities.

Your company's profit is either the goal or the result. Insight Companies might say, "We want to make a lot of money, so we're going to provide this product or service to do it." Outsight Companies might say, "We want to help transform our customers' businesses, so we'll provide products and services that help them do it...and we'll make a lot of money as a result."

Your company can choose to be an Insight Company or an Oversight Company. How about you – right now as you’re reading, listening, or watching? Are you an Insider or an *Oversighter*? Imagine if we could wave a magic wand and flip the percentages so 95% of businesses are Oversight Companies and 5% are Insight Companies? What would our economy look like? What would capitalism and democracy look like? Wouldn’t we have a better world in so many ways if everyone got up every morning thinking about how they were going to help *someone else* succeed?

It’s a hero’s journey and won’t be easy. You’ll face a lot of obstacles along the way. But no venture that’s worthwhile is easy, or everyone would have done it already. It’s easier to be an Insight Company. It’s harder to become an Oversight Company. By focusing on your customers’ transformation, you, your team, and your company can transform yourselves. But as you start this journey, in order to reach your destination, your mindset needs to be on the *customer’s goals*, not your own. Success will come. Trust the process. Just take that spyglass you’ve been holding so tightly in your hand for years, loosen the grip, flip it around, and hand it over to your customers. Take a deep breath. Then, ask them what they see.

The Customer Oversight Compass

There are four stages to the Customer Oversight journey. Each stage starts with the letter “F” to make it easy to remember: . Fix, Focus, Find and Fuel. Four verbs. Four stages to your customers’ business

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transformation and, as a result, your own. If you're picturing that spyglass, maybe you're pointing to a place on the horizon (FIX), then making that object in the distance clearer (FOCUS), heading in that direction as you see more (FIND), and then using your discovery as energy to propel you forward (FUEL). Fix, Focus, Find, Fuel. In that order.

In total, there are 12 oversight principles. Each F includes three main elements, which I will explain more in-depth throughout this book. . All are important to your hero's journey, to navigating the challenges and reaching your destination. But to begin, here's a quick summary of those 12 principles:

- **FIX**
 - Establish an **OBJECTIVE** for each voyage of discovery you make
 - Set a **TARGET** customer or group of customers you intend to collaborate with
 - Organize the logistics of each **MEETING** to improve the probability of success

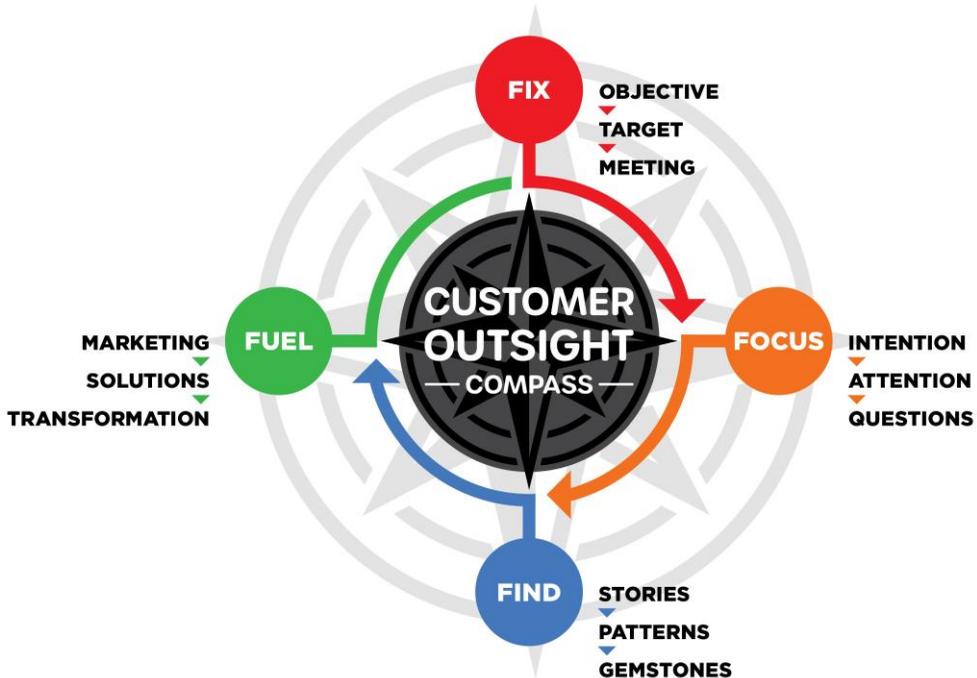
- **FOCUS**
 - Commit to your **INTENTION** to serve the customer and their needs
 - Place your full **ATTENTION** on the customer's perspective (hand over that spyglass)
 - Ask open-ended **QUESTIONS** that uncover the customer's priorities, not yours

- **FIND**
 - Locate **STORIES** buried within customer needs
 - See **PATTERNS** emerge within the stories that show simplicity within complexity
 - Discover what I call **GEMSTONES** that, when applied, drive business transformation

- **FUEL**
 - Use what you've discovered to power new **MARKETING** approaches (content, sales)
 - Create **SOLUTIONS** that address customer needs (products, services, experiences)
 - Drive **TRANSFORMATION** in your customers' business, and your own

The Oversight Compass illustrates the key process steps. This wheel has four quadrants to represent the four Fs. Within each quadrant are three important steps to follow. To attain Customer Oversight, the person or company following the process (that will be you, an Outsighter) will need to move through both the overall process clockwise and list of three steps from top to bottom. It's so important to follow these steps – in order – because they are additive and dependent on each of the previous steps.

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How to Know if It's Oversight

Customer Insight and Customer Oversight are different across the four Fs. In short, you'll need to Fix your sights on customers' goals, not your own. You'll need to focus on the customers' topics, not your own. Done right, you'll find hidden gems, not obvious information. Finally, you'll use what you learn to create something really different and useful for customers. You'll become a collaborative consultant, teaming up with your customers, putting your heads together to improve things with them...*for* them. That mindset shift helps customers open up and form deeper, trusting relationships; ultimately, it will take you from Insight to Oversight.

Below is a chart to help you further understand what distinguishes
Outsight:

INSIGHT VS. OUTSIGHT			
	CUSTOMER INSIGHT	CUSTOMER OUTSIGHT	
Objectives	Our Goals	Customer's Goals	FIX
Targets	Our Business	Customer's Business	
Meetings	Close-Ended	Open-Ended	
Intention	Our Perspective	Customer's Perspective	FOCUS
Attention	Our Ideas	Customer's Needs	
Questions	Our Topics	Customer's Topics	
Stories	Appear Obvious	Usually Hidden	FIND
Patterns	Overcomplicated	Often Simple	
Gemstones	Appear Intuitive	Often Counterintuitive	
Content	Our Words	Customer's Words	FUEL
Solutions	Me-Too Actions	Differentiating Actions	
Transformation	Serves Our Needs	Serves Customer's Needs	

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About This Book

I hope you find Customer Outsight to be a very practical book.
Together, the four sections represent a complete how-to guidebook for conducting successful interviews with customers, as well as other stakeholders within a company's sphere. . The principles are foundational.

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They transcend types of businesses and technologies. Many of these approaches were applicable 100 years ago and should help 100 years from now.

You'll notice I use bold type for every paragraph's first sentence. I do this to help you, as the reader, scan easily. In theory, you could read only the bold lines and get the general message of each chapter – and the entire book. But, I hope you'll read everything since the real magic is in the details!

In a few places, you'll see a reference to “Customer Oversight Deep Dive.” If you have an interest in learning more about a topic, you're in luck. Even though this book is comprehensive, I still have more ideas and material to share. You can access and download that bonus material – and all the charts in this book – from the Customer Oversight website, www.customeroutlook.com.

If you're really motivated and inspired, consider Customer Oversight education options. On the website, you'll find information about videos, webinars, training modules, and more. You could sharpen your own skills or recruit your whole team to learn this transformative approach.

To be clear, I address my words to *you*, specifically. Because the book involves instructions, I wrote it to help you achieve greater heights in qualitative market research. . My style is intended to share what I've learned using a personal approach. I'll be as conversational and casual as I can, and hope you'll forgive a little serious theory and process along the way. Some of the nitty-gritty details are less exciting, but vital.

You'll find I use nautical analogies from time to time. Since I refer to a compass and a spyglass, why not a ship and a vast ocean? Wind, choppy

seas, and storms? Of course! Like Odysseus of mythological lore, expect challenges to overcome. Life and learning are never all smooth sailing, but always worth the effort when you reach your destination.

Along the way, you'll also see a few consistent landmarks. I've included word definitions and origins, supporting quotes from luminaries past and present, and real-world examples of how Customer Oversight works when following the process – or might not work if deviating from the process. As I said, it's a hero's journey, but I know you're up for it. Let's leave the harbor and begin our voyage!