



A toolkit

to understand your customers

This toolkit is explicitly designed to help small businesses identify what their customers really care about. Failing to adjust to customers' changing needs in a competitive local (and now global) market means customers can easily go elsewhere to get their needs met.

There are 5 different activities that you can start using today based on what you most want to tackle.

What's in the toolkit?

To learn more about the customers you have to grow your business

Seek Feedback

Time Required: 5 minutes

Observing Customers

Time Required: 5 minutes

To create returning customers who become ambassadors of your business

Service Safari

Time Required: 30 minutes

Customer Journey Maps

Time Required: 1 hour

To learn how to fix something that isn't working

The 5 Whys

Time Required: 10 minutes

Seek Feedback

Time Required: 5 minutes +

What?

Many businesses invest in feedback in some form, e.g. they might leave comment cards out for customers or invite feedback on a website, but often they fail to understand how crucial the right kind of feedback is to business growth. There are two kinds of feedback, active and static. Static feedback, like a customer comment card, is a one-way flow of information. It means you lose an opportunity to learn critical information by asking the customer their reasons, the why's. For example, you might receive a score for your customer service but not know why it was scored in this way.

Active feedback is a two-way flow of information, like a conversation, providing the chance to ask why customers feel a certain way. You might have precise questions that you are trying to get answers to, so it can be helpful to think about how these might flow in a conversation to keep it informal.

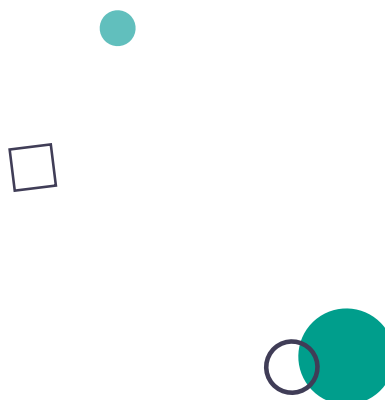


Why?

Today's world is complex and ever-changing, so getting regular feedback from customers is vital to understand how well you're meeting your customers' needs.

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Seek Feedback



How?

One tool you can use is a Feedback Capture Grid. This is a structured way of organising feedback from a conversation about a product or service. But first— what is it that you want to know about your customer?

1. To start using a Feedback Capture Grid, divide a sheet of paper into four quadrants. (We've made one for you on the following page)
 - Label the top-left quadrant Likes – this will be where you will note down positive feedback.
 - The top-right quadrant is Criticisms, where you will capture negative feedback.
 - On the bottom-left quadrant is Questions, where you write down questions that the customers have asked.
 - Lastly, label the bottom right quadrant Ideas, where you take down any ideas that the feedback session had sparked.
2. Try to make sure that each quadrant has at least a few notes.
3. When using the grid during a chat with a customer, you can steer the conversation towards quadrants that are currently not receiving enough input.
4. Next, gather and share the lessons you have learnt with your team.
5. Then, consider how you might use the feedback you have received. For example, you could start a brainstorming session with your team to help generate ideas to address the feedback collected about your business.

Feedback Capture Grid



Likes and positive feedback



Criticisms and negative feedback

Questions asked by customers



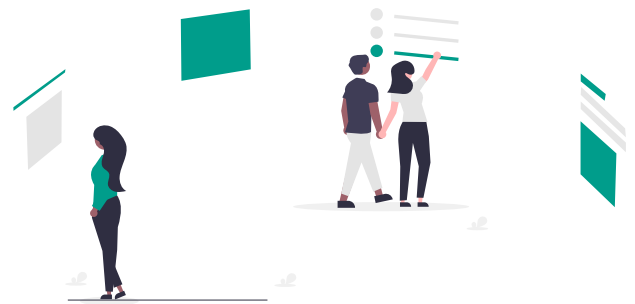
Ideas sparked by this session

Observing Customers

Time Required: 5 minutes +

What?

Observation is about paying particular attention to what is going on in the environment. It's about observing your customer's behaviour with your product/service as they use it in day-to-day life. e.g. by watching customers in a small print shop business, the owner discovered that customers were bored waiting as he served one customer at a time. By putting a sofa in the shop, customers could browse their phone and were happy to stay there instead of going elsewhere. Observation is a powerful tool.



Why?

Customers may not feel able to be completely honest with business owners if they think they might offend. What customers do, however, can tell you a lot about what is going on for them. Keeping a close eye on what a customer is doing gives insight into what isn't working. This could result in making minor changes to fix a problem that could make a customer look elsewhere.

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Observing Customers



How?

With only a few questions, you could end up with some valuable insights that give you a sense of what is going on for your customer. But first, jot down a list of what you think you know. This list is your assumptions. This allows you to compare what you assume is true of your customer with what you find.

1. Here are a few questions to get you started:

- What is the customer doing?
- How are customers using your service/product in their daily lives?
- What routines do you notice?

2. Now you can build on your observations by speaking to customers:

- Record details – be sure to jot down the things that jump out. Don't overthink it; for now – record it!!
- Compare what you find with the assumptions you jotted down earlier.
- Looking back on your assumptions, what is different and what is the same? Have you learned anything new?
- Check it out with your customer. Ask them. Open up the conversation. Be curious.

What they might tell you could be a gamechanger!

- From what you have learned, is there anything you can do to make the service/product easier to use, more convenient, useful or, just like the addition of the sofa earlier, a more enjoyable experience that keeps a customer coming back.

Service Safari

Time Required: 30 minutes +

What?

A Service Safari is a trip on site to understand the business from the customer perspective, and is often used in parallel with visits to competitor sites.

Why?

It helps someone find out what the service is like from the customer perspective, see the bigger picture, and how different customer groups might interact with the same product or service. Essentially, it helps you get on the same page as your customer, allowing you to step into their shoes.



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Service Safari



How?

Ideally, enlist the help of someone you trust as it's very difficult to see your own business with fresh eyes. You will naturally overlook things, or focus more attention on others. Another risk is that your staff may inherently treat you differently as the owner. You want to recreate how your customers experience your business.

1. Set a time for when you will do this activity: You might decide to do it once or make several visits at different times in the week or month, e.g., comparing a weekday to a weekend.
2. Capture information: There will be lots of information that could be captured. Try not to think about it too much. Just capture as much as possible. This could be written notes, physical items like receipts, or photos. Think about anything that jumps out at you, good or bad!
3. Consider touchpoints: These are the points of interaction between a customer and your business. For

example, in a restaurant, this might be the washrooms, the staff, the menus, or even the website, social media or a phone call to make a reservation.

4. Digest this information: What does it mean? Here are a few questions to help.
 - What stood out to you?
 - What is exactly as you anticipated it might be? Have you learned anything new? If you have been comparing with competitors, do you stand out? What are you doing that is better, not doing, or not doing as well?
 - Is there anything you can do to make the service/product easier to use, more convenient for your customer, or more clearly defined from what you have learned?

Check your understanding with the customer. Include them in the conversation to ensure you haven't made any other assumptions from what they've told you.

Customer Journey Maps

Time Required: 1 hour +

What?

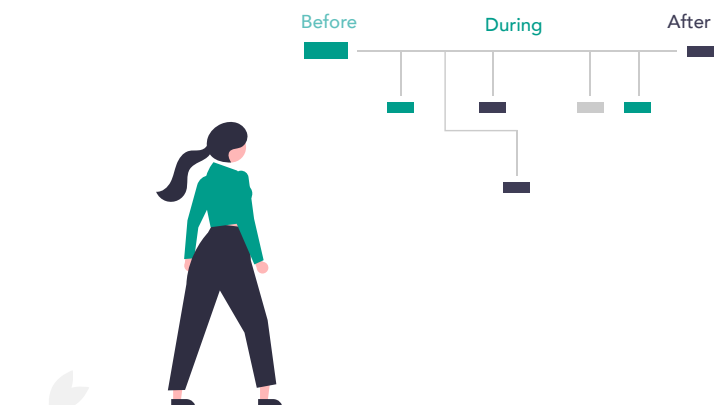
A Customer Journey Map is a way of understanding what a customer does when they interact with your business, step by step. If you own a hotel, a customer may research many hotels as a first step. They may call the hotel to check something or go to Trip Advisor to see what others are saying before deciding to book.

The journey a customer takes has three parts: Before, During, and After, which can be further broken down based on the customer's sentiment towards your business. These are a nice starting point to get into the detail: Aware, Consider, Buy, Convert and Advocate.

Why?

It can be difficult for a business to see its service beyond its perspective. However, a visual step by step of the customer's journey can help highlight when things are working well (or not!) for customers. A happy customer keeps coming back, and sometimes it's small changes that can make the difference here.

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Customer Journey Maps



How?

Business owners are also customers, e.g. a hotel owner who stays in another hotel can experience a hotel as a customer, from finding their website, booking the room to having breakfast and checking out.

1. Start to think about how you, as a customer of other services, experience them. Ask yourself what you thought was good and not good about these services. Did they meet your expectations? What did? What didn't? Would you go back and use that service again, yes, or no? Why? Perhaps you are in a cafe, and it takes forever to be served, or maybe you were served quickly. Think about how that feels and what you are inclined to tell others about that cafe.

2. Now that you have started to think about your own customer experience, think about your business. What are the steps your customer takes, and what is each step like for them? Do you think the cafe knows how you felt? Probably not, so by not understanding this, they miss out on your custom.

They also miss out on the custom of the people you didn't recommend it to.

Let's start by breaking this into stages:

Stage 1: Getting Started

Before, During, and After

Stage 2: Getting into the detail

Aware, Consider, Buy, Convert, Advocate

Stage 1:

Before, During, After

1. The first stage is **Before**.

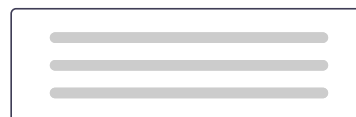
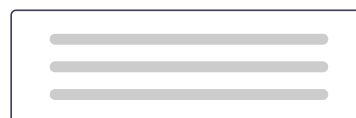
What steps does your customer take to find you? Where can they find you? If you have a website, does it provide the information they need or are they likely to move on? Don't think about the great things you know to be true about your business; look through the customers' eyes. What do they see? What information do they have to make a decision? How does it compare to your own customer experiences?

2. Now, think about when customers are accessing your service. What are the steps they will take to achieve the goal that your business can support? Remember, this is why your business exists!

This is the **During** phase. What happens first? Are the steps in the proper order? Are they easy to access? Logical? Clear? Troubleshoot! What could you do to make it easier or better?

3. The next and final phase is the **After** phase.

Now that a customer has accessed your service, can they give feedback? Can they raise an issue? If they have a problem, what can they do? Is this clear? How can you reassure them you are there to help with this part too, and that you don't consider the sale as the end of their journey?





Stage 2:

Aware, Consider, Buy, Convert, Advocate

1. Before a customer interacts with your business, they will do several things; firstly, they need to become **aware** of your business. Perhaps, they find you on social media or see an online advertisement, or maybe they come across your website. You should think about how customers can find you. When they do find you, is the information on your website clear? Will they need to make further enquiries? Remember, awareness includes word of mouth.
2. During their search for a company, customers will likely come across competitors who offer a similar service. Your unique selling point may be convenience (which has tremendous value in today's market), but make sure your offer is articulated clearly. They may visit your store at this stage or phone to have a conversation. Whether they realise it or not, they will **consider** both the tangible elements (design of the website, how the storefront looks) and the intangible elements (interaction with staff, atmosphere at your premises, etc.).
3. At this stage, the customer will have made their choice and are ready to **buy**. Like all other stages, there will be things that make this process straightforward and easy, or not. Sometimes a customer wishes to purchase something, but it's difficult, and they give up and go to a competitor. Perhaps they need the convenience of buying it online. Think about the steps to purchase something in your business. Is it easy as it can be? Is it convenient?

Stage 2:

Aware, Consider, Buy, Convert, Advocate

4. Returning customers are the bread and butter of most businesses, but it's easy to forget that retaining customers is as important as attracting them in the first place. The convert phase is really about this.

- What keeps your customer coming back?
- Do you answer after-service queries promptly?
- Do you check with your customer to see how they're doing?
- Do you ask them? Customer tastes change all the time, so keeping on top of these tastes is crucial.
- Knowing your customers can be the difference between success and failure.

5. Customers who rave about your business are your most powerful marketers. They're advocates of your business.

People look to others for recommendations and will take another customer's word over clever marketing any day.

As a customer yourself, think of how you rely on others to inform you about businesses and how impactful this is? Then think about your customers, think through the various stages from aware to advocate. What are the key things that a customer might value or which stand out?

- Can you ask them?
- What was it that made them consider your business?
- What's the thing they might appreciate in any of those phases?

Try to identify at least one. The more you can understand the steps they take, the more you can tailor your service to meet your customers' needs and earn those crucial word of mouth recommendations.



5 Whys

Time Required: 10 minutes +

The 5 Whys method is a simple way to dig into a problem your customers face and uncover valuable insights that might help you solve it.

What?

Quite literally, it involves asking your customers 'why?' whenever they explain something to you. Each time you ask why it prompts someone to re-evaluate their position and think about their reasoning. It may seem a little odd to keep asking why at first, but it will bring great insights while allowing you to dig deeper to find the root cause(s) of their behaviours.

Practising the 5 Whys method is also helpful in situations when you think you already know the answer. What you learn might surprise you!



How?

A small business owner has decided to introduce an app that provides customers with an alternative way of purchasing their new range of products, but no one is using it - see how the 5 Whys method helps to dig deep into the root cause of the situation:

'Why is no one using the app?'

The new app is difficult to use.

'Why is it difficult to use?'

It takes too much time.

'What takes time?'

It asks for lots of information that I don't have to hand, as I didn't need it last time.

'Why didn't you need it last time?'

It was stored in my profile on the website, but it's not in the app.

'Why is it not in the app?'

Because the website doesn't talk to the app.

“

There is only one boss.

The customer.

And they can fire everybody in the company from the owner on down, simply by spending their money somewhere else. ”

Congratulations! You've started the journey to truly understand your customers. These tools are a great way to get you started.

This toolkit has been developed as part of the User Factor Project. It is provided for free thanks to funding from Interreg Atlantic Area.

For any questions or additional information about the User Factor Project, please visit:

UnderstandYourCustomersNI.info

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