



Identify key customer needs and moments that matter

Many organizations map customer experience, but very few can identify and effectively respond to the key customer needs and moments that matter. Customer research often STARTS and STOPS with secondary research, a single survey or a set of data. This single-source approach misses a key point—that customers are multi-dimensional human beings.

The following 7 elements are a checklist for remembering that many aspects play into the full picture of your customer, or anyone you'd like to serve or influence.



Head

What is your customer thinking? How are they using logic and reason to make a decision? How are they processing and gathering information to support emotional decisions?

Qualitative Interviews; Bulletin Board Focus Groups; Observational Research; Qualitative and Quantitative Surveys

Words

What are they saying about you? Your product? Your industry? Are they silent, complaining, or declaring themselves part of your community? Who is listening?

Qualitative Interviews; Social Listening

Heart

What is your customer feeling? What are their needs, desires and emotions? How do their emotions affect their behavior and relationship with you?

Qualitative Interviews; Qualitative and Quantitative Surveys; Demographic Research

Connections

What are their networks? Where do they get their advice? Do referrals matter to them? Who do they trust? Who do they influence?

Qualitative and Quantitative Surveys; Demographic Research; Social Listening; Qualitative Interviews

Hands

What actions is the customer taking in this situation or environment? What's the level of effort? How does effort affect their decisions? What levers can be modified to change behavior?

Observational Research; Qualitative and Quantitative Surveys; Analysis of In-House Data

Wallet

How does your customer feel about money? Are they stretched and stressed? Are they looking for a bargain or willing to pay a premium? What makes the difference? What value does your service or product carry?

Qualitative Interviews; Qualitative and Quantitative Surveys; Demographic Research; Analysis of In-House Data

Environment

Where does your customer live? Work? What media do they take in? What are the market trends that influence or matter to them? What studies can help you understand more about their approach to decision-making? How do your brand and product fit into your customer's current environment?

Qualitative and Quantitative Surveys; Demographic Research; Market and Competitive Research