

Delivering Value-Driven Solutions To Your Customer



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INTRODUCTION

Have you have ever had that nagging “Are we staying on top of the latest marketing and technology ideas” thought? If so, you’re far from being alone. The good new is the opportunities to engage with customers and prospects have never been more abundant. With this seemingly all you can eat buffet of connection channels comes a very real sense that we need to be consuming more. And this is where our anxiety really kicks in. Surely everyone else has figured it out, and we’re still back in the Dark Ages with no clue where to begin. It’s a story we tell ourselves too often.



“ Learning and innovation go hand in hand. The arrogance of success is to think that what you did yesterday will be sufficient for tomorrow.

William Pollard

Learning Is Best When Shared

Not so long ago we found ourselves in a perpetual state of “needing to know”. There is no silence in the noise of experts. The internet is littered with best practices that will surely lead to unimagined success. Transformative tools powered by affordable platforms create the promise of simplicity. We became consumed by webinars, blog posts and the ease of the one-click subscribe to the latest stack of ebooks.

The focused attention we devoted to all of this learning, research and exploration was without doubt a valuable investment. As avid readers and curious learners, time spent in peeling back


the cover of a newly-discovered knowledge nugget was exciting. But here's what happened when we finally leaned back to digest all we had consumed.

We Got Why. But How?

We got “why”. Easy, right? Some newly-inspired ideas even uncovered “what” with a healthy confidence in “where”. Equipped with our now clearly-defined buyer personas, we could fairly confidently say “who.”

What brought us to an abrupt loss of momentum was the very simple “how”. Tools, technologies, data and theory without a simple, actionable plan are pointless. We've dedicated more than a quarter of a century to creating and executing business-centric technology solutions for our clients. **Why not apply our familiar software development methodology to solve “how”?**

With that question we knew that integrating marketing and technology would become the next innovation opportunity that we were inspired to tackle. Our aha moment was the beginning of the Value-Driven Solutions model.

A person with long hair, wearing a checkered shirt, is sitting on a large, light-colored rock. They are looking out over a vast, hazy landscape with trees and hills in the distance. A hat is placed on the rock next to them.

**“Ideas are easy.
It’s executing that creates the lasting
value.”**

WHAT IS THE VALUE-DRIVEN SOLUTIONS APPROACH?

Very simply Value-Driven Solutions is a lean, iterative approach to delivering products and services by continuously learning who our customers are and what they value. This adaptive business approach of strategy-to-execution is based on well-established business models. The Lean Startup model in the technology space was inspired by the Toyota Production System. This in turn influenced the Growth-Driven Design approach to website design from HubSpot. What results is a holistic framework for value-driven solutions throughout the organization. Each person, department and process within the company continuously contributes to a more streamlined, frictionless customer experience.

How does a Value-Driven Solution contribute to customer discovery and learning? As you plan each new company initiative, a key activity will be gathering relevant online and offline data about each customer. You will look at each interaction with your organization from the customer's perspective and ultimately create the customer experiences that focus on his unique needs.

WHY IS CUSTOMER DISCOVERY AND LEARNING IMPORTANT?

It's all about connecting with today's informed customer.

The way we attract, engage with and deliver value to our customers has changed. By now it's no surprise that our customers are better informed than they were just a few years ago. Our relationship begins at a much different place in their buyer's journey, and

What Customers Expect Today

- ☒ A personalized experience
- ☒ Anticipating their needs before they arise
- ☒ Trusted collaborative relationships

90% of business buyers use search for their business purchases and do, on average, 12 searches before they reach the company's own site.

their need-to- know mindset continues throughout our relationship.

With ready access to information --- some more reliable than others--- our customers set their expectations about our product, services and overall commitment to their day-to-day relationship with us. How customers are treated by other companies, even those totally unrelated to us, sets a standard for service that we inherit. Meeting customer expectations is no longer just an empty marketing phrase that we can casually toss around. Today we have to consistently and honestly deliver on that promise.

Who are these informed buyers, prospects and loyal customers? Where do they connect with us? What do they want and need from us? The questions can seem endless. **A Google-Millward Brown study found that 90% of business buyers use search for their business purchases and do, on average, 12 searches before they reach the company's own site.**

The good news is we have access to more real-time data about our coveted prospects and clients than ever before. Equipped with the right tools and an agile process, we can create meaningful connections where, when and why they occur.

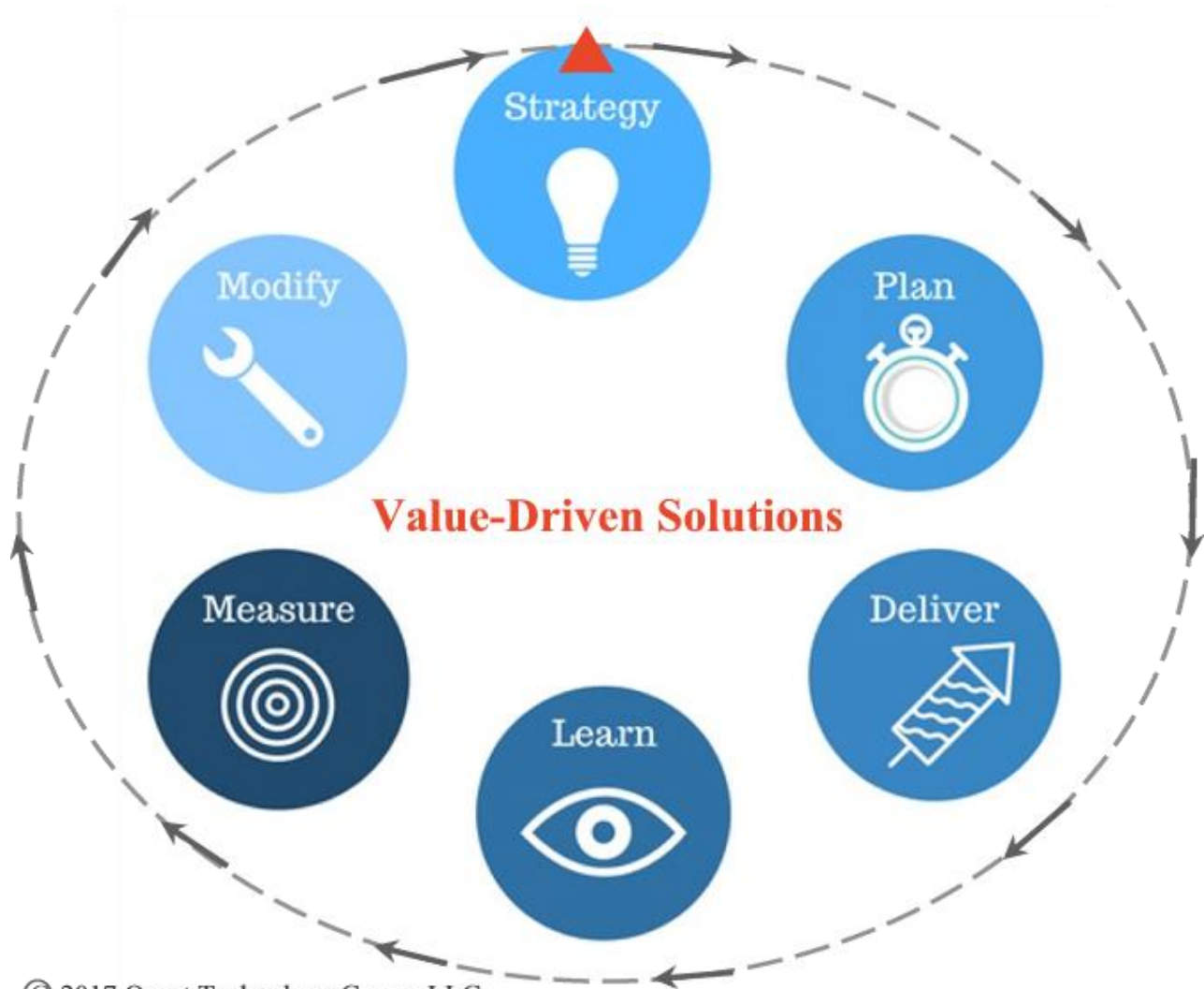
HOW ADOPTING THIS APPROACH HELPS DELIVER VALUE

- ☑ Supports an agile, iterative process for quickly delivering new products and services that return real customer insight
- ☑ Encourages a consistent focus throughout the organization based on shared assumptions
- ☑ Sets goals and realistic expectations at each stage of the process
- ☑ Supports a measure and manage mindset
- ☑ Ensures consistency with each incremental project
- ☑ Eliminates biases more quickly

6 Steps to Creating Value-Driven Solutions



LET'S GET STARTED



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Step 1: Strategy

The due north in our Value-Driven Solutions model is a clear strategy statement. It sounds obvious, but it can easily be bypassed in favor of the more immediate ---and exciting-- rush to get started. Setting strategy is actually getting started.

Even if your organization has a well-crafted strategy, we encourage you to begin with an all hands on deck review. It's amazing how easily we assume that everyone is on the same page only to discover down the road how many interpretations there can be for even simple words and ideas. This kick-off is a great way to build enthusiasm and set expectations.

Every organization will have its own activities to include in the strategy phase. The following are ones we recommend every organization include.

1. Goals

Develop a clear understanding of the business objectives this initiative will achieve. Every discussion and decision will always be based on "Is this consistent with our overall objectives?" If not, then you might either consider revisiting the goals or bringing the discussion back to the goals already defined.

2. Buyer personas

Create semi-fictional representations of your ideal customers. Personas not only clearly define who your customers are and why they need you but also where they want to connect with you.

Give these personas names and refer to them often. While it might sound like a silly exercise, the benefits are very real. As you continue through the steps in your initiatives,

there will be many opportunities to improvise on the fly. Any time you find this happening, ask your team “what would “Decision-Maker Dave say”. Let your personas keep you on course. You will have the time later on in the process to validate or disprove your assumptions about Decision-Maker Dave. For now, Dave is in charge.

3. Fundamental assumptions

Identify the problems, solutions, risks, success metrics and events that will occur. Every initiative begins with a set of assumptions. An initiative can be as simple as an email campaign or as broad as an enterprise-wide technology solution. Every initiative needs a clear purpose with metrics for measuring success. As you move through the steps in the Value-Driven Solutions model, you will gather real data that will be used to validate or disprove your assumptions.

4. Customer journey map

Develop comprehensive views of your personas’ interactions with your company from awareness, consideration, decision and day-to-day connection. Sounds tedious, right? Good news. This is really a fun step that reveals some surprising things about the way your customers interact with you.

Since your customers and prospects interact with your organization in many ways start with the interactions that relate to the initiative you are launching. For example, if your goal is to reduce the cost of customer acquisition, your work session will identify every customer touch point in the transaction. This first journey map will provide your team with a blueprint from which to begin. As you gather data after the launch, you can compare this baseline with what you have learned. This visual roadmap will guide your team in discovering friction points as well as undiscovered opportunities for valuable change.

Each step in the journey map should include the following four points:

- ☒ Touchpoint – where does each step happen? For example, email, website, social media.
- ☒ How Long – what is the anticipated length of time to complete this step?
- ☒ Expectations -- what does the user expect during this step? For example, ease of use, one-click transaction, speed, excellent service.
- ☒ Systems and Processes Involved – what internal and external people, processes and systems contribute to this interaction?

5 Organizational impacts

Identify each person, department and process within the organization that will be impacted by and contribute to the success of each project.

The customer journey map is an excellent tool for visually recording these interactions. Consider this as a collaborative exercise with all team members. This outside in view of the organization is an important mindset to develop.

6 Research

What do your customers really expect, value and need from you? This is a factual customer answer rather than an internally derived guess. While assumptions are part of the strategy step, they are based on factual data collection. Begin by looking at data you currently have about your customers and prospects. Some excellent sources include:

- ☒ Sales information collected in your CRM
- ☒ Information collected in support call software
- ☒ In-person feedback from your sales team
- ☒ In-person input from your customer support team
- ☒ Surveys
- ☒ Customer interviews with a cross-section of frequent and infrequent users
- ☒ Response to existing online offers

7 **Wishlist brainstorming**

Create the “if time and resources weren’t considerations, this is what we would do” master list of innovative ideas. The purpose of this exercise is to capture in one place all potential projects. This will become the master list from which new initiatives are planned.

As you learn more from each new launch, it is likely the list will change. Ideas that seemed unimportant may become a priority. Great ideas may change or be completely removed from the list based on the continuous learning cycle.

Brainstorming is a great way to build a sense of contribution within your organization. There are many ways to conduct a meaningful session, and you have probably done these often within your company.

If you are ready to ready to give brainstorming a try, here are some tips to make this a successful exercise.

- ☒ Start with a comfortable setting that encourages creativity.
- ☒ Invite a good cross-section of your organization including sales, marketing, phone support, front line customer support, developers, designers and C-level.
- ☒ Implement a no-phone, no-Internet, no-email, no-texting policy. It’s impossible to be creative and engaged when continually giving in to outside distractions.
- ☒ Provide food and drink.
- ☒ Take a short break every 2 hours with the no distraction policy still in force. You don’t want to lose the creative flow.
- ☒ Provide a supply of Post-Its, markers, whiteboards or flipchart paper than can be easily shared with everyone. Hang them up, move them around and see how ideas connect.
- ☒ No idea is a bad idea. This is pure judgment-free sharing where everyone has a voice.

What You Can Learn

- ✓ Was the strategy as clear to everyone as you thought it would be?
- ✓ There is a real sense of excitement that comes from a collective “we’ve got it!” moment.
- ✓ How did the team dynamics come together? You’ll be working as teams throughout this approach so this is the right time to begin thinking about the right collaborative groups.



Step 2: Plan

Now that the strategy activities are complete (at least for this pass), it's time to decide what to do first. What will bring the most immediate value to your customers and prospects with the least impact to your organization?

Remember: always approach this from the customer's perspective and not an inside out mindset.

How does this initiative fit into your organization's existing plans? The best idea when taken alone may seem like a no-brainer. When woven into the big strategic web, the implementation might look very different. That's why we always say "strategy first".

Build an Agile Team and Work in Sprints

The agile approach we use in software development is especially valuable in this phase. Work is done in sprints by your dedicated agile team. The team works together to complete each task. The deliverables are clearly defined and progress regularly measured. The purpose of these short build cycles is to move quickly to the delivery, learning and measurement steps.

Remember:

Always approach this from the customer's perspective and not an inside out mindset.

Since our learning is based on real customer data, you can only begin to test your assumptions with live customer interactions. This doesn't mean you sacrifice quality for speed. There will always be a healthy balance between the two. As you continue with the Value-Driven Solutions approach, this balance will become a natural part of your thinking.

As you begin working with the Value-Driven Solutions techniques, it will become easier to plan future deliverables. Each initiative will begin to build on the others already on the plan.

Tools Are Part of the Team

As you begin to put details to the features you will be building for your customers, you will want to consider what tools will help in the delivery, learning and measuring steps. Since our customer will be teaching us through his interactions, having a reliable suite of information-gathering tools in place is critical. This tool suite might include some or all of the following depending on the deliverable:

- ☒ **Heat maps** to record user interactions
- ☒ **Tracking codes** on all landing pages
- ☒ **Google Analytics** cohort testing
- ☒ **Slide up surveys**
- ☒ **Email surveys**
- ☒ **Exit forms**

What You Can Learn

- ☒ What tools are you already using? How can they contribute to the information store that you will continue to feed?
- ☒ What new tools should you add to your tool suite?
- ☒ Remember, part of the benefit of this agile approach is you are continually, quickly adapting what you deliver based on what you have learned. Introduce new tools gradually so they are manageable in any cycle. You can always add, change or delete something later.



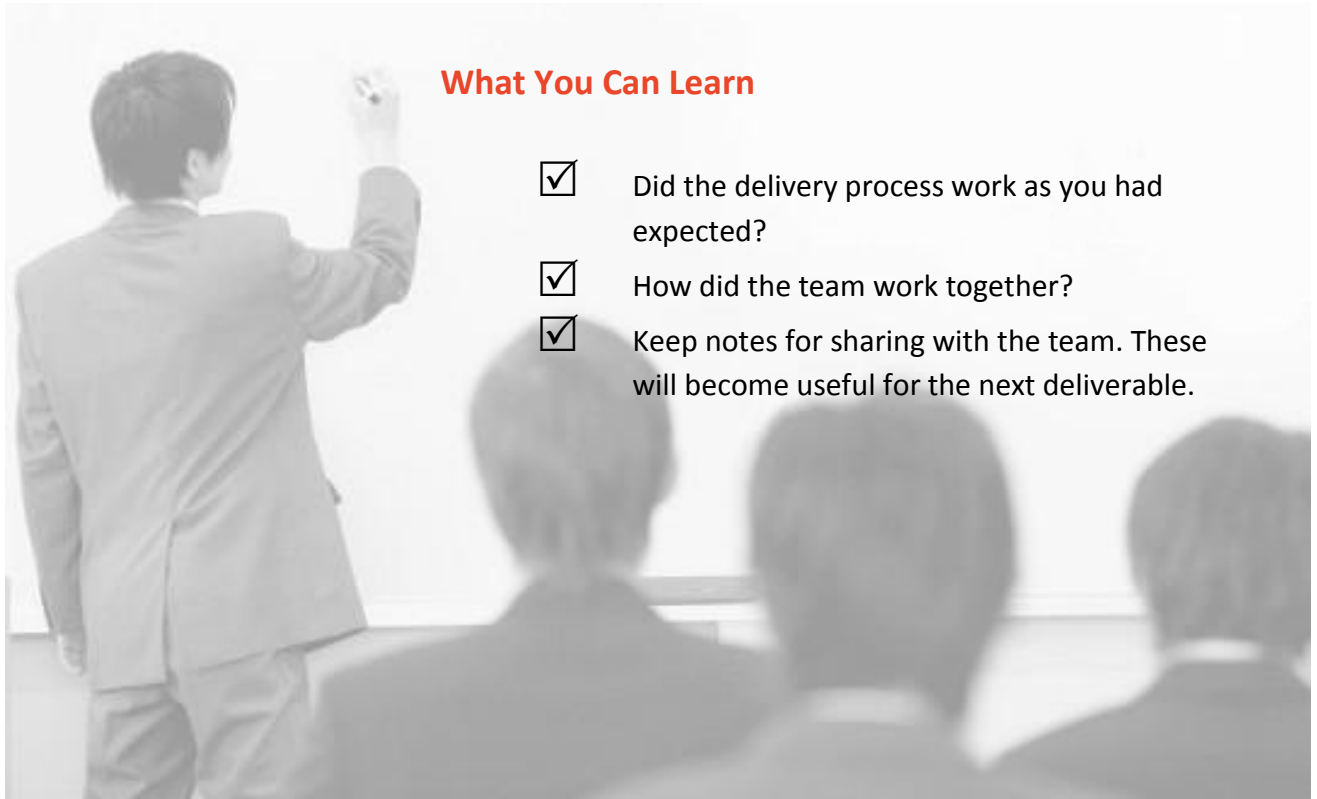
Step 3: Deliver

Now the real fun begins. Your work has been completed and tested by internal testers. When you have verified that the deliverable meets the internal requirements agreed to, it's time to launch.

Each deliverable will be different of course, and how you launch will be done in a way that makes sense for it. There will be some consistent activities that will occur for any new product or service feature.

Communicate

- ☒ Let your internal teams that the product has officially been launched. These are the same teams who have been a part of the communication loop throughout the project. No surprises allowed.
- ☒ Your customers will appreciate a clear, enthusiastic communication from you that a new feature is ready for them.
- ☒ To gather the most meaningful customer information, tell your customers what you have delivered and why. Monitor the responses to your communication as closely as you do the actual customer engagement with your deliverable.
- ☒ Ask your customers to share their feedback with you. Remember, this is customer experience first.
- ☒ Most launches benefit from an A/B testing phase so make sure your communications are appropriate for each phase.



What You Can Learn

- ☑ Did the delivery process work as you had expected?
- ☑ How did the team work together?
- ☑ Keep notes for sharing with the team. These will become useful for the next deliverable.



Step 4: Learn

Think of your digital presence as a continuous opportunity to learn more about your prospects and customers. Data is being gathered each time your customer moves around the digital landscape. To fully understand your customer you need to become a dedicated data collector.

It's All About the Data

The big challenge every organization faces is the same --- how do we collect this data goldmine, compile it in a digestible way and continuously learn from it? Every organization regardless of size, industry or maturity already has a wealth of data acquired with every customer interaction. This brings us to three important questions:

1. What data do you already have?
2. How is this data shared?
3. Where is this data stored?

Data acquisition and management are broad topics that deserve a discussion of their own. For the purposes of this introductory ebook, we just want to explore how we learn from the data your customers create for you. The assumptions that were made in the planning stage now have real supporting data that results from the specific actions your customers have taken.

What Is Your Customer Data Telling You?

How do you learn from this data? Here are a few ways to get started.

- ✓ **Heat maps** are excellent tools for visually recreating the customer buyer journey maps you created.
- ✓ **Online surveys** used during customer interactions with your website are useful for collecting specific information.
- ✓ **Single question slide-ups surveys** allow you to ask very targeted questions at a specific point in a transaction.
- ✓ **Email surveys**
- ✓ Customer **support logs** can be parsed to identify patterns.
- ✓ In-person **customer interviews** uncover opportunities and challenges phrased in the customer vocabulary. Listening to the words and phrases can **create a new list of keywords** you might not have considered.
- ✓ **Observation.** It's amazing how often users do something so simple that we never expected.
- ✓ On-page **chat** creates engagement with a live person at a specific point in time.



What You Can Learn

- ☒ Was this deliverable received by your customers the way you thought it would be?
 - ☒ What would you change if you could? (Good news! You can change it. That's why we have the modify phase.)
 - ☒ What new opportunities did you discover that had not been anticipated during the strategy and planning phases? Add these to your master list for review during the next cycle.
 - ☒ What tools delivered the most useful data for you?
 - ☒ What information do you wish you had that you don't have? This is great input for the next cycle.
-



Step 5: Measure

During the planning step, you defined a set of assumptions and metrics that directly correlated to success. Now it's time to use what you have learned to validate or disprove these earlier yardsticks.

The methods you use will naturally depend on the actual deliverable. It is important that there be clear standards defined early on. How else will you know if what we deliver has value? Your HubSpot and Google Analytics reports are two visual resources for assessing results.

For example, if your deliverable was a streamlined series of pages where customers could enroll for an online course in less time than they currently do, you might use some of the following to measure your results.

- ☒ Heatmap recordings will show you exactly how your customer moved through the pages. Did they follow the flow you expected? Were some items overlooked or not understood? How long did it take to complete the transaction?
- ☒ Cohort reports in Google Analytics allow you to compare different groups of people with specific start times. This report is useful for tracking return visitors and evaluating their engagement.
- ☒ The HubSpot event report displays the number of visitors completing a transaction over a variety of time periods.
- ☒ A funnel report will show you where in the transaction flow visitors are dropping out. This information combined with the heatmap recording can be a highly useful indicator of why customers are abandoning the transaction.
- ☒ Simply comparing the number and dollar volumes over specific time periods are a measure that everyone can quickly understand

Measurement is another broad topic that will be explored in a separate ebook. For now, let's enjoy some important takeaways.



What You Can Learn

- ☑ If the results didn't support your earlier assumptions, that's not unusual. Most of us start with an inside out view of what's important. Your customers just told you exactly what they really value from you. They gave you objective, actionable data that you can now use to let them know you were listening.
- ☑ Do you have a large enough set of real data to make accurate assessments? If not, then continue to compile data before drawing any conclusions.
- ☑ Were your original metrics realistic?
- ☑ Were the leading indicators valid?
- ☑ Was the deliverable a success?
- ☑ What internal people, processes and systems were impacted that you had not expected?
- ☑ What internal improvements were gained as a result of this initiative?
- ☑ Document your results. You're ready to move to the final step – modify.



Step 6: Modify

Since Value-Driven Solutions are all about learning from your customers, it's only logical that there will be changes to your deliverable. What did you learn that will be carried forward into the next iteration?

Getting It Organized

- ☒ Begin by reviewing the documentation from the Measure step. As you identify changes, be sure to add them to your master wishlist.
- ☒ Have any of these changes affected the items already on your wishlist? It's possible that some will become more important while others may be replaced, demoted or removed completely. Remember ... it's all about iteration.
- ☒ What changes will create the greatest value for your customers in the least amount of time? Sound familiar? You're coming back to the Strategy and Plan steps now.
- ☒ Did you identify a new target customer that you were unaware of? How does this new customer fit into your existing buyer personas?
- ☒ This is the time to revisit the customer journey map your team created for this deliverable. Does your journey map need to change to reflect actual customer data? Keeping your journey maps up-to-date will provide you with an ongoing history of your changes and a visual reminder of the successful improvements made in each cycle.

What You Can Learn

- ✓ Modify is a very natural part of the Value-Driven Solutions approach. It allows you to create and deliver an ever-better product or service in the shortest amount of time with the most dedicated resources.
- ✓ Modify doesn't mean the deliverable was a failure. Each iteration is a valuable learning opportunity that your customers continuously participate in.
- ✓ Documenting the results of the Measure step allow you to organize and continually prioritize.
- ✓ Your ongoing master list will always be current and relevant to the overall strategy.
- ✓ You will be less tempted to take on the next "big idea" when your objective customer data might lead you in a more productive direction.

TOOLS & RESOURCES

Free Downloads

[How to Create Your Buyer Personas](#)

This includes your buyer persona template and tracking workbook.

Visit the [Quest Technology Academy](#) for more downloads, tips and tools

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[The Content Code](#) by Mark Schaefer

We love to share tools, books, research and surprising discoveries.

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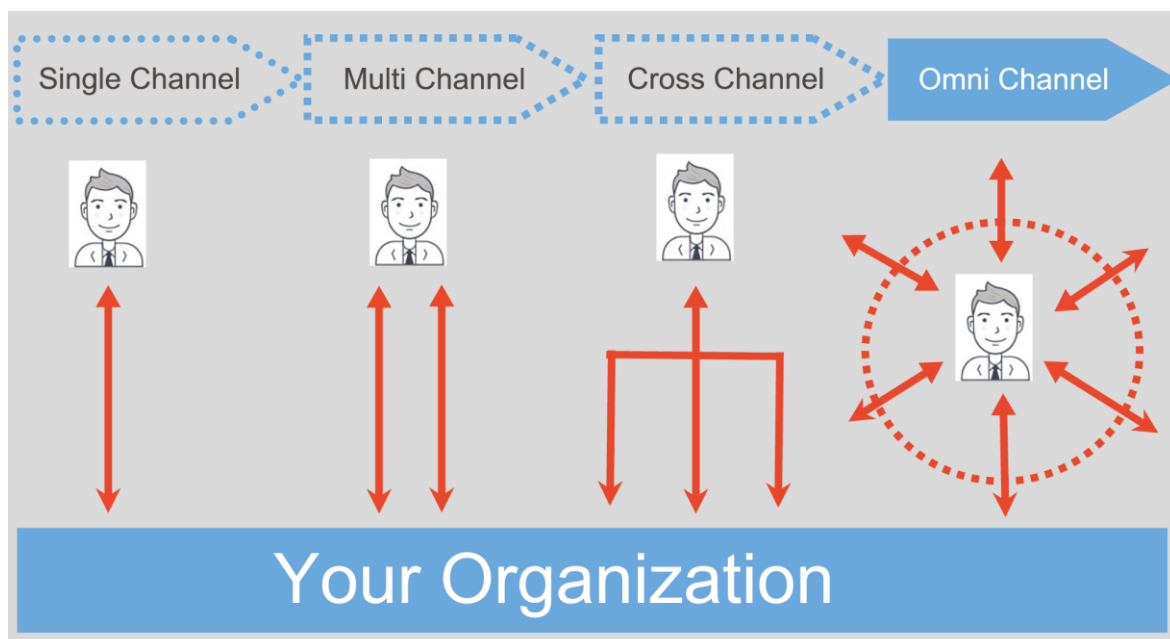
LOOKING AHEAD

The predictions for creating a whole new level of customer engagement and understanding are both exciting and daunting. With the speed of change impacting the way we do business, it is easy to get lost in the noise. While these are all great topics to explore in other posts and ebooks, there are three thoughts we want to leave with you

Omni-Channel Expectations

It is estimated by 2020 customers will expect an omni-channel experience with your company. According to a recent study, 65% of all CMOs have no long-term plans for implementing this approach and no budget allocated for it.

Quite simply your customers will expect a seamless experience with your organization regardless of the channel used to connect with you. One estimate has the customer changing channels at least 5 times during the course of a single transaction. The implications are significant. As you plan your deliverables, consider each channel that your customer might use, when and for what specific activity.



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The Shift to Voice

According to a Google study conducted by Northstar Research, more than 50% of U.S. teens and over 41% of U.S. adults use voice search daily. This is a trend that will continue to grow. Unlike keyboard-created search queries, voice searches tend to be longer and often are phrased as complete sentences.

What does this mean to your organization? Voice search creates new opportunities to learn from your customers. What questions are they asking? The content you deliver across all of your communication channels should be designed to answer customer questions in new ways.

Search engines are listening to context and intent, not just the actual words.

Your customers expect the same new listening from you.

Search engines are learning from these long word queries. Results are being delivered based not only on the actual words but also within context and intent. Listening to your customers requires a deeper focus on the meaning behind the spoken words.

AI – Machine Learning

The Customer as a Connected Network

So far we have talked about your customers in the context that we are all familiar with. There is a human-to-human connection between your organization and your customer. That's what customer engagement is based on. An interesting fact is beginning to reshape that direct customer connection. **According to an IBM Watson stat, one million new devices are connection to the internet every day, and they are not phones and tablets.**

Think about that for a moment. These devices are engaging with our products, services and platforms without direct human interaction. That person with an implanted medical device is our secondary customer. His device is communicating directly without human direction.

Our customers are creating their own micro-networks of internet-connected devices that are now your new customers.

Our customers are now the owners of their own micro-networks. Each device is working independently without knowledge or awareness of the other network inhabitants. Suddenly our need to know and serve our customers takes on a very different meaning.

In Conclusion

Building lasting customer value is an exciting ongoing journey. As we learn from our customers and continuously explore the tools and technologies available to us, our customer relationships evolve in ways we never imagined.

Quest Technology Group is here to help you explore, implement and deliver Value-Driven Solutions to your customers.

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How Can We Help Your Organization?

About the Author



Linda Rolf founded Quest Technology Group in 1991. She has traveled the technology landscape for more than 35 years. Linda has designed and developed enterprise applications for a wide range of industries including insurance, healthcare and private member communities. Linda sees unexpected connections among everyday business and the ever-evolving technologies, propelling Quest Technology Group's clients to new growth successes.

Linda is a passionate entrepreneur, avid learner, creator and connector of ideas and people.