

Virtual VOC

Understand B2B customer
needs from your office

A WHITE PAPER FROM THE AIM INSTITUTE
BY DAN ADAMS

*Do your new-product teams use
web-conference voice of customer interviews?
Here's why they should... and how to master them.*

Virtual VOC

Understand B2B customer needs from your office

If you *only* conduct in-person voice of customer interviews, you're neglecting an important tool for customer insight. Learn these 10 advantages of virtual VOC... and 7 tips for becoming a VVOC pro.

Which is better? An in-person customer interview or one conducted by web-conference? You can easily argue the in-person interview is the gold standard. You'll make a stronger personal connection, watch for body language, and perhaps take a tour afterwards. If you compare a 2-hour in-person interview to a 2-hour web-conference, we know which wins.

But what if you spent ten hours of travel for the in-person interview and zero hours for the virtual interview? What if your travel budget is limited? And what if there are hidden advantages of virtual VOC you've never considered?

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It's time to move beyond simplistic either-or comparisons of in-person vs. virtual VOC. They each have their attractions and limitations. The clever new-product development team understands what these are and skillfully deploys a mix of the two.

In this paper, we'll explore...

1. The fundamentals of virtual VOC
2. 10 Advantages of virtual VOC
3. 7 Tips for better virtual VOC

1. The fundamentals of virtual VOC

“Voice of customer” means different things to different people. The focus here is gaining *market insights for B2B innovation* through qualitative and quantitative interviews. You’ll probably use a moderator, note-taker and observer to listen to a group of customer contacts, usually from the same company.

Traditionally, your team sits in the customer’s conference room for the interview. But with virtual VOC, your team could sit in your conference room while customers sit in theirs. Or just your sales rep could meet in-person with customers while the rest of your team stays at your office. Or all participants could join the interview from their home offices.

All parties connect through a web-conference service, e.g. Zoom, Skype or Webex. Why not just use a phone conference call for this? It’s *critical* that your customers can watch as you record their thoughts.

Why? They’ll be able to correct what you get wrong or omit. They’ll be able to build off each other’s ideas. Most important, this is the key to holding their attention and interest during the interview. *Don’t underestimate how much visual feedback engages customers.*

New Product Blueprinting practitioners provide this feedback by displaying sticky notes and slider rating bars for Discovery and Preference interviews, respectively (see illustration).

Discovery interviews are qualitative and divergent: “*What other outcomes are important?*” Preference interviews are quantitative and convergent: “*What are your most important, unmet needs?*” You can watch a video of these interviews at www.vocforb2b.com.

The screenshot displays the Blueprinter 5.0 interface for a project titled "SCOPE: Possible innovations for e-commerce packaging". It features a grid of sticky notes representing customer feedback. The sticky notes include:

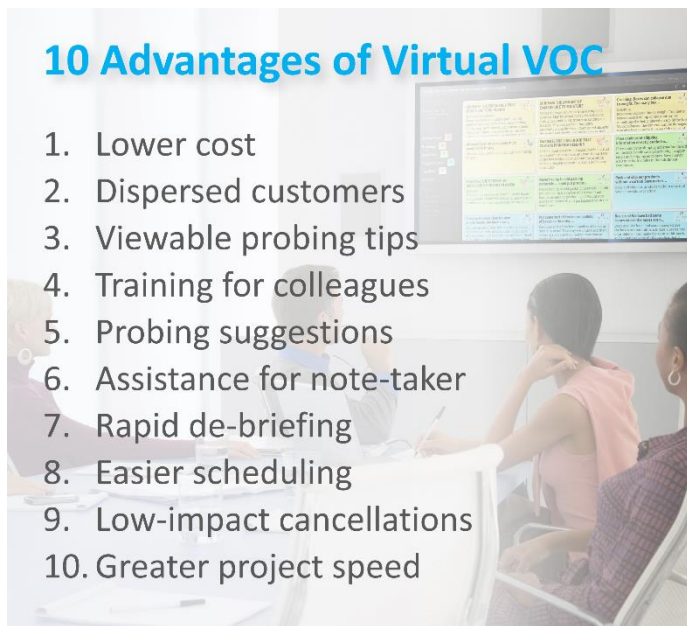
- MINIMIZE THE FREQUENCY THAT BOXES ARE TORN DURING**: Damage from boxes occurs one time at multiple points in the delivery process...
- MINIMIZE THE AMOUNT OF DAMAGE DUE TO MOISTURE**: Moisture damage can come from a number of sources...
- Crushing. Boxes can collapse due to weight. Too many boxes...**: Boxes can collapse due to weight. Too many boxes stacked on top of one another...
- MAXIMIZE THE LIKELIHOOD THAT CUSTOM PRINTING REMAINS**: Talked about pre-printed boxes, but boxes that we custom print are also an issue...
- MAXIMIZE THE PERCENT OF RECYCLABLE CONTENT IN A NEW**: Recycle! The amount of recycled content in the boxes you provide would like it higher...
- Never having to add packing materials - could put product...**: Never having to add packing materials - could put product in the carton and it would not bounce around or get damaged...
- Pack and ship our products without a carton! Save material...**: Pack and ship our products without a carton! Save material, save effort.
- Shorten the lead time for new empty boxes. We have a var...**: Shorten the lead time for new empty boxes. We have a variety of sizes and shapes, can't afford to keep lots of inventory on hand...
- Put some sort of tracker on pallets of boxes as they ship...**: Put some sort of tracker on pallets of boxes as they ship to us. That way we could track them before arrival and then in your warehouse...
- Box sizes! We have had some issues where the boxes are not uniform in size. Creates lots of problems - can make for an unstable stack, and sometimes space for the products that is...**: Box sizes! We have had some issues where the boxes are not uniform in size. Creates lots of problems - can make for an unstable stack, and sometimes space for the products that is...

Below the sticky notes, a quantitative preference interview is shown for the outcome "MINIMIZE THE LIKELIHOOD OF BOX DAMAGE FROM MOISTURE". It features a slider bar for importance (1-10) and a bar chart for satisfaction. The importance is set to 8.5. The bar chart shows a score of 12 for this outcome, with a satisfaction level of 45%.

2. 10 Advantages of virtual VOC

The AIM Institute began studying and refining virtual voice of customer interviews in 2009. It's no coincidence that we started in the depths of the great recession, when our clients had severe travel budget constraints.

At first, we were not hopeful. But the more we experimented, the more we realized virtual VOC doesn't have to sacrifice much compared to in-person VOC. We also discovered some "hidden" advantages of virtual VOC we hadn't considered. Let's explore both these obvious and little-known advantages.



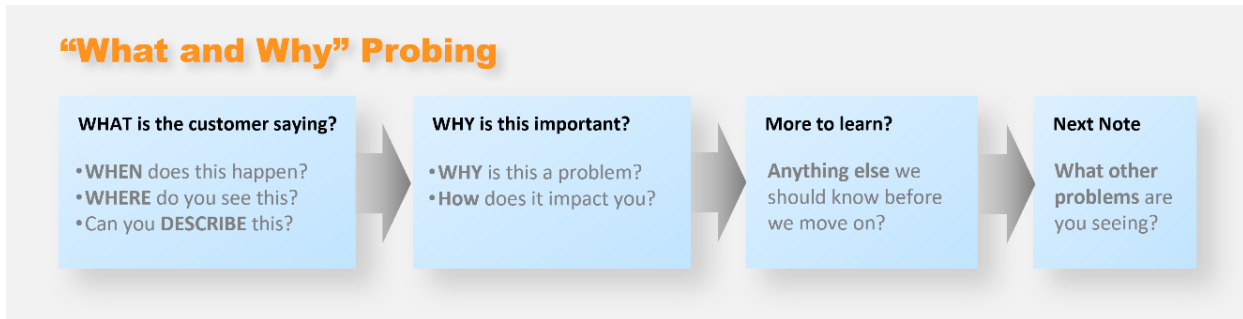
Advantage 1: Lower cost. We'll start with the most obvious advantage. Imagine you send 2-3 interviewers out on 6-10 qualitative and 6-10 quantitative interviews. You could easily spend \$50,000 on travel expenses. And you've probably consumed 2-3 person-months of employee time, with at least 80% of it completely wasted in rental cars, security lines and cramped airplane seats. These travel expenses and non-productive personnel time disappear with virtual VOC.

Advantage 2: Dispersed customer contacts. What if your customer's R&D staff is in Houston and its marketing is in Chicago? Or if some or all of your customer contacts are working from home... and your team is as well? With virtual VOC, geography no longer matters. This is important for qualitative Discovery interviews, because you should interview multiple customer contacts *simultaneously*. This lets customer contacts build off each other's ideas. Just like brainstorming.

For quantitative Preference interviews, it's even *more* important to engage all decision-influencers at the same time. Why? Imagine the operations manager rates the importance of abrasion resistance at "3" and the market manager gives it a "9." If you gathered results *individually*, you'd have to average their responses at "6" ... a terrible idea. But in a virtual session with all present, you can let them debate. You eventually resolve department-specific viewpoints with a simple question: "*From the perspective of your entire company, how important is abrasion resistance?*"

**With virtual VOC,
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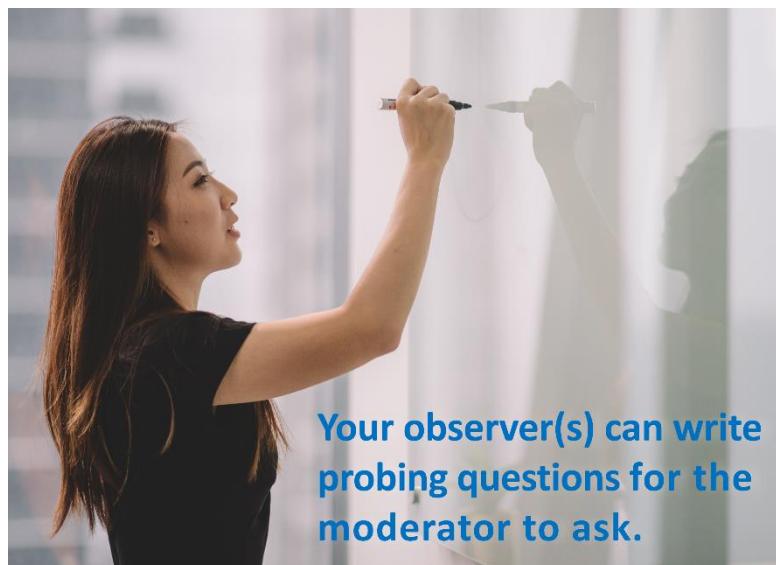
Advantage 3: Viewable probing tips. The key to great VOC is great probing. Practitioners of [New Product Blueprinting](#) learn the “What and Why” method of probing. The moderator asks “What” questions, such as “*When does this happen?*” and “*Can you describe this?*” Then she asks “Why” questions, like “*How does this impact you?*” After customers respond, she asks, “*Anything else we should know before we move on?*” Only after this does the moderator explore the customer’s next outcome (“*What other problems are you seeing?*”).



Here’s the advantage of virtual VOC: You can set these probing tips in front of you during the interview and keep referring to them. You can also do this with in-person interviews, but it’s much smoother in a web-conference because customers don’t see you checking your notes.

Advantage 4: Training for colleagues. Perhaps you want to train additional employees in B2B VOC. Imagine if they could observe *real* interviews... without travel costs... without taking much time... without disrupting the interview dynamics. Virtual VOC comes through again. Introduce them at the beginning of the interview—no one should ever eavesdrop—and then let them observe the interview. They can easily do this in a conference room with the rest of the interview team or from their home office.

Advantage 5: Probing suggestions. If your interview team is meeting in a conference room together, make sure it has a whiteboard or flipchart. If possible, have two observers supporting the moderator and note-taker. As the observers think of probing questions the moderator missed, they write them on the whiteboard, making sure to also record the number of the sticky note. Then your brilliant-sounding moderator can say to the customer, “*I had another question about something you said on note number 2... product damage due to moisture.*”



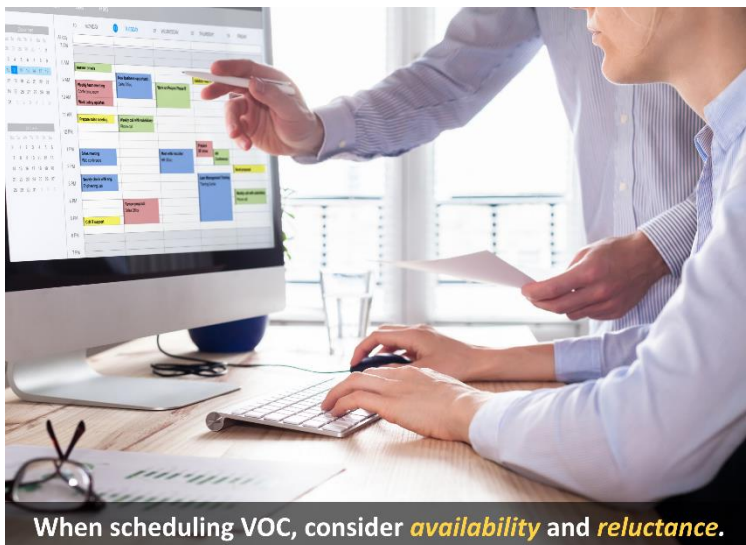
Advantage 6: Assistance for note-taker. We've noticed something peculiar about in-person interviewing: Customers sometimes forget about the poor note-taker. Because they're so engaged in the discussion, they may fail to notice that the note-taker is falling behind. These dynamics change with virtual VOC. Since the only thing customers *can* watch is the web-conference screen, they quickly notice any lagging note-taking. We find customers are more helpful in slowing their pace, repeating points, and suggesting text changes.

Advantage 7: Rapid debriefing. After an in-person interview, the team should go to a nearby coffee shop or airport lounge and debrief: Picture the team gathered at Starbucks with the observer recommending additions and changes as the note-taker makes them in the appropriate sticky notes.



The [Ebbinghaus Forgetting Curve](#) suggests we forget half of what we've learned in the first 24 hours. With virtual VOC, the debriefing can begin *immediately* after the interview. No hunting for a place to speak openly, setting up the laptop again, worrying about catching flights, etc.

Advantage 8: Easier scheduling. Sometimes the hardest part of B2B VOC is scheduling the interview. The issue usually boils down to *availability* and *reluctance*, and virtual VOC helps with both. The availability of your team can be dicey if all three of you need the *same* open travel day that the customer is available. But it's easier finding a time when you're all available for a 1-to-2 hour virtual interview.



What about customer “reluctance”? Would you rather have a traveling salesman come to your *home* or call you on the *phone*? OK, perhaps a bad analogy, but you get the idea. Some customers will feel more comfortable giving up an hour or even two, if they know they can say at the end of the allotted time, “Well, I need to go to my next meeting now.”

Advantage 9: Low-impact cancellations. Face it, you'll likely have some cancelled customer interviews, for any number of reasons:

- Your main customer contact got sick.
- Their company just had a business emergency.
- Their boss called an all-hands meeting.
- Their conference room was taken over by a VP.
- Your contact made a calendar mistake or simply forgot.

With virtual VOC, you don't need to limp back to the airport empty-handed at the end of a wasted day. You simply reschedule.



Advantage 10: Greater project speed. We saved our favorite for last. If your new product eventually has annual sales of \$5 million with average profits, can you guess the net present value of accelerating the launch by one month? About \$80,000. You create \$4,000 of NPV for every business day you accelerate your project.

Virtual VOC lets you move faster with more productive scheduling and the ability to schedule two or possibly more interviews per day. Converting many of your in-person interviews to virtual VOC can *easily* trim a month or two off your timeline.

You create \$4,000 of NPV for every business day you accelerate your project.

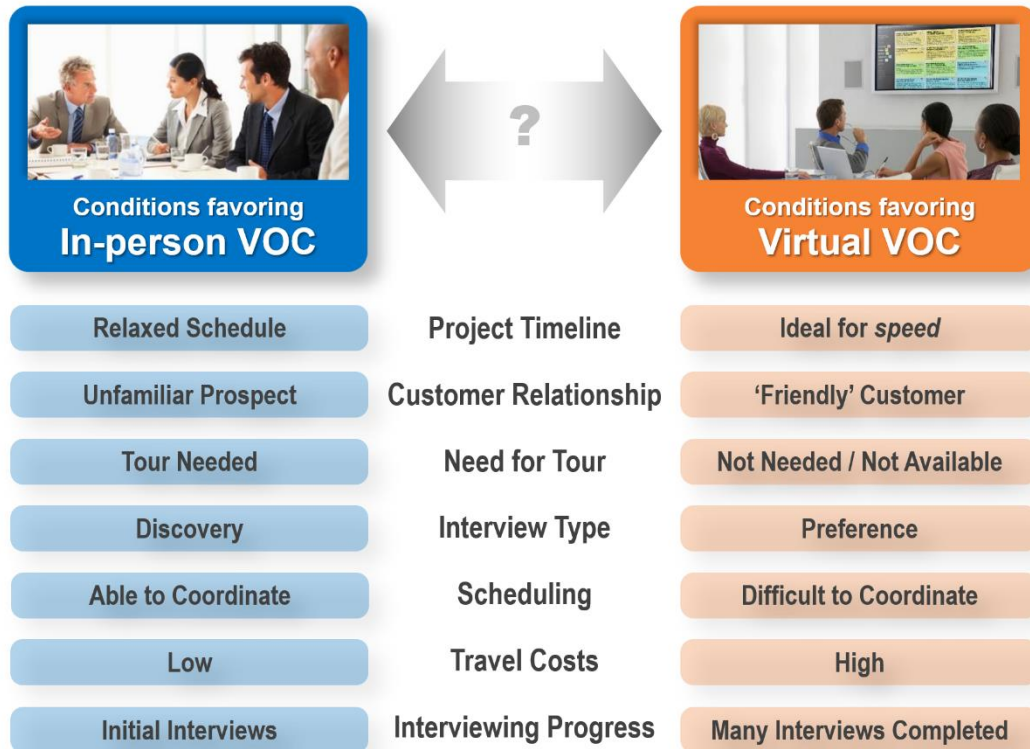
One more suggestion: As you finish up each Discovery interview, ask the customer for a good date and time for the Preference interview. Get it on the calendar right now, and you'll accelerate your timeline *and* save the hassle of setting up Preference interviews later. Use this tip with both in-person and virtual VOC to rapidly complete your interviews.

2. 7 Tips for better Virtual VOC

Do these advantages inspire you to include virtual VOC interviews as part of your customer insight? Before you start scheduling your web-conferences, be aware we *have* seen some go badly: Connection problems. Poor audio. Stilted, awkward dialogue.

Fortunately, you and your team can come across as highly polished *and* gain impressive customer insights. It just takes some preparation. Let's explore seven recommendations to put you on a path to becoming a VVOC pro.

Tip 1: Choose wisely. We've seen projects where interviews were done a) all in-person, b) all virtually, and c) with a mix of the two. Consider the following factors to determine the best approach for your project:



- *Project timeline:* Because it's easier to get on customers' calendars with Virtual VOC—and you can conduct multiple interviews per day—VVOC means *speed*.
- *Customer relationship:* Virtual VOC works especially well when you already have a relationship with a friendly customer. *But...* many have done VVOC with strangers.
- *No need for a tour:* Consider virtual VOC after you've completed enough customer tours with earlier in-person interview sessions.
- *Interview type:* Virtual VOC works well for both Discovery and Preference interviews, but it is especially productive for the latter.
- *Scheduling:* If you're having a hard time coordinating calendars, consider scheduling a virtual interview.
- *Travel costs:* Virtual VOC eliminates your travel costs, which is especially helpful in difficult economic times or when international interviews are needed.
- *Interviewing progress:* Many teams conduct their initial interviews in-person, and then move to virtual VOC. The latter is most helpful for Preference interviews when you want more 1-to-10 outcome ratings to boost your statistical confidence.

Tip 2: Build your team’s skills. Practice interviewing as a team in a graduated, stepwise fashion. Begin with safe audiences, such as industry experts you pay to interview, then your own sales professionals, and so on.

- *Industry Experts:* If you pay to interview a GLG, AlphaSights or similar industry expert, use this time to improve your skills. Forget the phone-only approach and conduct a web-conference interview. Start with your market research questions. Then for the rest of your time, ask the expert to respond as he or she believes customers would.



- *Sales colleagues:* Set up a web-conference interview and ask them to reply “as the customer would.” Besides great practice, you’ll get your sales team comfortable with these interviews, so they’ll be more effective in requesting them.
- *Internal departments:* Do you have others in your company with experience in this area, perhaps based on their prior work at another company? These could be helpful interview candidates.
- *Distributors:* If you use distributors, interview them before the “real” customers that use your product. This will be good practice for you, let’s you understand how much market insight they have, and turns your distributors into more effective partners.
- *Smaller, safer customers:* If you have smaller customers, start your interviews with them. Also, consider interviewing “friendly” customers who will overlook your lack of “smoothness” until you get comfortable with this type of interviewing.
- *Larger, high-stakes customers:* By the time you “build up” to these customers with prior practice, you and your team-mates will be one highly-polished and impressive interviewing team!



Tip 3: Prepare your customer. If you're looking for great virtual VOC, you'll need to carefully prepare your interviewees:

- Work hard to get *several* customer contacts joining each interview, not just one. You'll get more valuable information this way, and raise the overall energy level.
- Make sure all customer attendees—not just your main contact—receive a copy of the meeting agenda.
- Don't call this an "interview," as this can have a bad connotation. Instead, call it a Discovery or Preference "meeting" or "session."
- Provide customers with the WIIFM: "What's in it for me?" Tell customers you could be one of their sources of open, external innovation. You're already staffed with industry experts. You're eager to work on *their* problems. You expect no up-front payment. They can decline your innovation. There's no risk on their part. *But* to do this... you need to understand their needs first!



- Ask your main contact to join the meeting 10-15 minutes early in their conference room, so you can get the web-conference working and do a sound check.

Tip 4: Make this enjoyable for customers. With a little effort, your virtual VOC will engage and energize your customers. Here's how:

- Use your webcams so they can see your smiling faces... especially at the beginning of the session. At a minimum, display photos of yourselves.
- At the onset, go around the room with introductions. Start with your team members and keep it light and friendly.
- You might order some food to be delivered to them from a local restaurant, such as Panera. (Check with your main contact first.)
- Use lots of visual cues during the meeting. If you're using Discovery sticky notes, refer to the sticky note number so all can follow along. Or if you want to draw their attention to some text, be sure to highlight it.

Use your webcams so they can see your smiling faces.

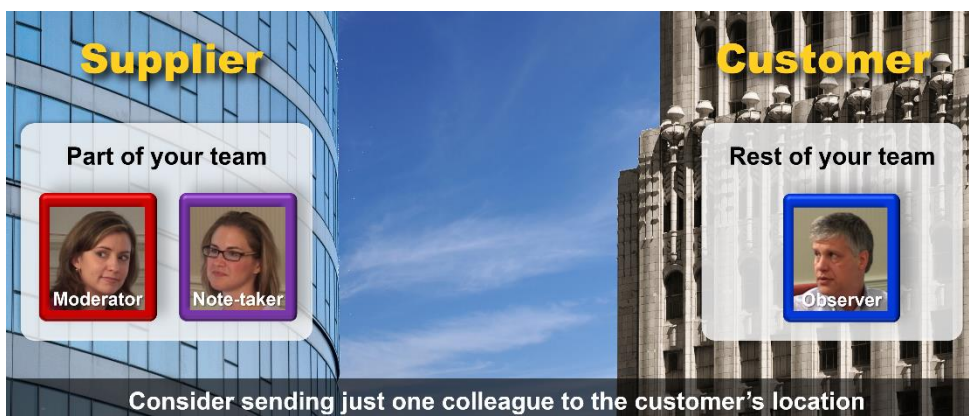
Tip 5: Probe like a pro. Getting the right customer contacts into your interview is the most important part of VOC success. After that, top-flight probing separates great VOC from mediocre VOC. Go for “great” with these tips:

- Put probing tips in front of you during virtual VOC. As discussed in Advantage #3, you can keep referring to your “what and why” probing questions throughout the interview.
- If your interview team is meeting in one conference room, have your observer(s) write good probing questions on a whiteboard, as suggested in Advantage #5.
- Invite VOC “trainees” into your virtual VOC for first-hand experience. By the time they start conducting their own interviews, they’ll be well past the novice stage.



Tip 6: Consider sending a local colleague. Do you have a sales rep near the customer’s location who could physically represent your company? They can help in several ways:

- Have your sales professional arrive early and help with meeting setup. Then everything will be ready to go when the first customer walks into the conference room.
- It’s a great ice-breaker if your colleague is physically in the customer conference room for greetings and introductions.
- Your local person can be your primary interview “observer.” They should watch body language, monitor signs of impatience, notice if one person isn’t getting a chance to speak, etc.



Tip 7: Ensure strong follow-up. This is true for in-person as well as virtual VOC... but it bears mentioning: *Be sure to follow-up after your interview.* The worst possible outcome of a B2B interview is your customer saying this: *“Yes, that company did a nice interview... but then we never heard from them again.”* Consider these approaches:

- Ask the customer how they’d like to be updated... and do it.
- Use a phone call or e-mail to say thank you.
- Send a PDF of the interview notes & ask them for any updates.
- Call them to ask for help in clarifying some points.
- Share summarized industry results of your interviews.
- Call or e-mail to indicate that your project is still active.
- Have your sales rep provide them with periodic updates.
- Share your new product prototypes with the customer.

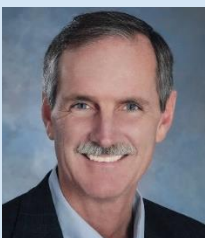


Learning More

Ready to take your B2B customer insight to a new level? The best starting point is to attend one of our open workshops... now available in a virtual format! See www.blueprintingworkshop.com.

You can also use these resources to move your company to better B2B VOC... better market insight... better new products... and ultimately, better organic growth.

- Download a free PDF of this and other white papers at www.aimwhitepapers.com
- Visit www.newproductblueprinting.com for videos and other resources.
- Download the free e-book, [Reinventing VOC for B2B](#)
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Dan Adams is the founder of The AIM Institute, and author of the book, [New Product Blueprinting: The Handbook for B2B Organic Growth](#), the weekly blog, [Awkward Realities](#), and the newsletter, [B2B Organic Growth](#). He is a chemical engineer, and holds many patents and innovation awards, including a listing in the National Inventors Hall of Fame. An award-winning speaker, he has trained thousands of B2B professionals all around the world in his methods.