

Customer Research Methods

May 2023



Next Generation Network
the future of insurance innovation

Our Mission



Position Ireland as a vibrant test bed for Insurance innovation where startups, insurance firms, brokers, MGA's, investors and academia work together to advance innovation and create value.

We're looking to help change the industry



Our Founding Members



Next Generation Network

Creating a community of insurance professionals influencing the next generation of insurance through championing innovation



Community

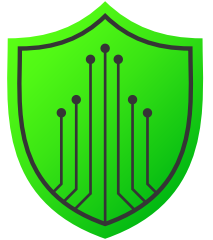
Learning

Promotion

Next Generation Network

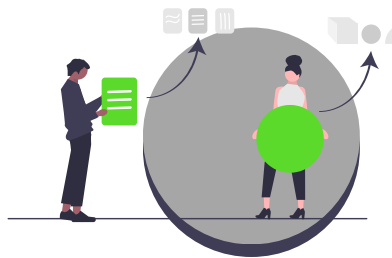
the future of insurance innovation

Today



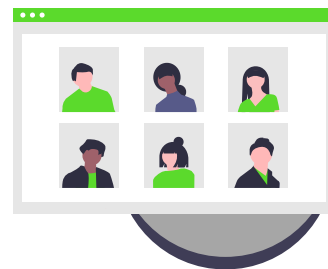
Human-Centred Design

Get to know a little about Design Thinking and why we use it



Customer Research Methods

An overview of some of the research methods used to understand customers



Discussion

An opportunity to chat to others about customer research methods



Recommended Resources

Recommendations for learning more about Customer Research Methods

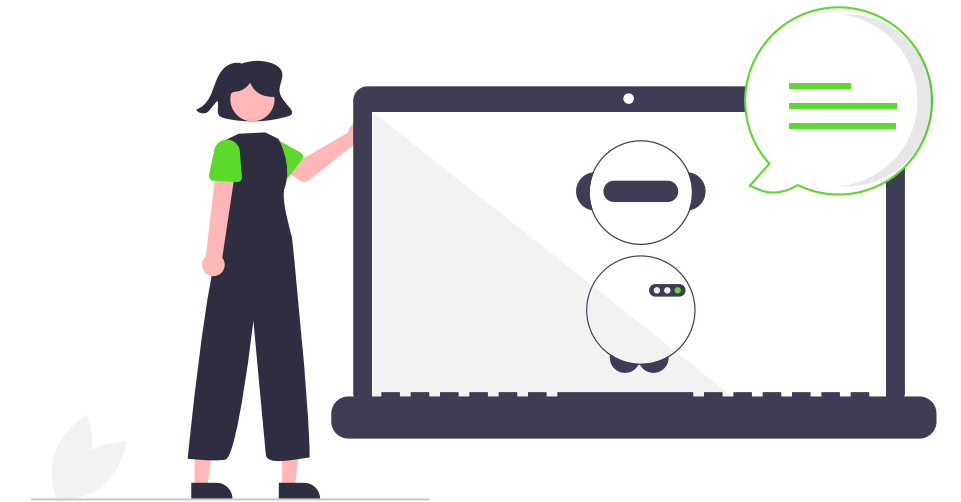
What is Innovation?

Executing ideas

Which address a specific challenge

And achieve sustainable value

For the company or customer



Source: Skillicorn, Nick. "What Is Innovation? 15 Experts Share Their Innovation Definition." Idea to Value, 18 Mar. 2016.

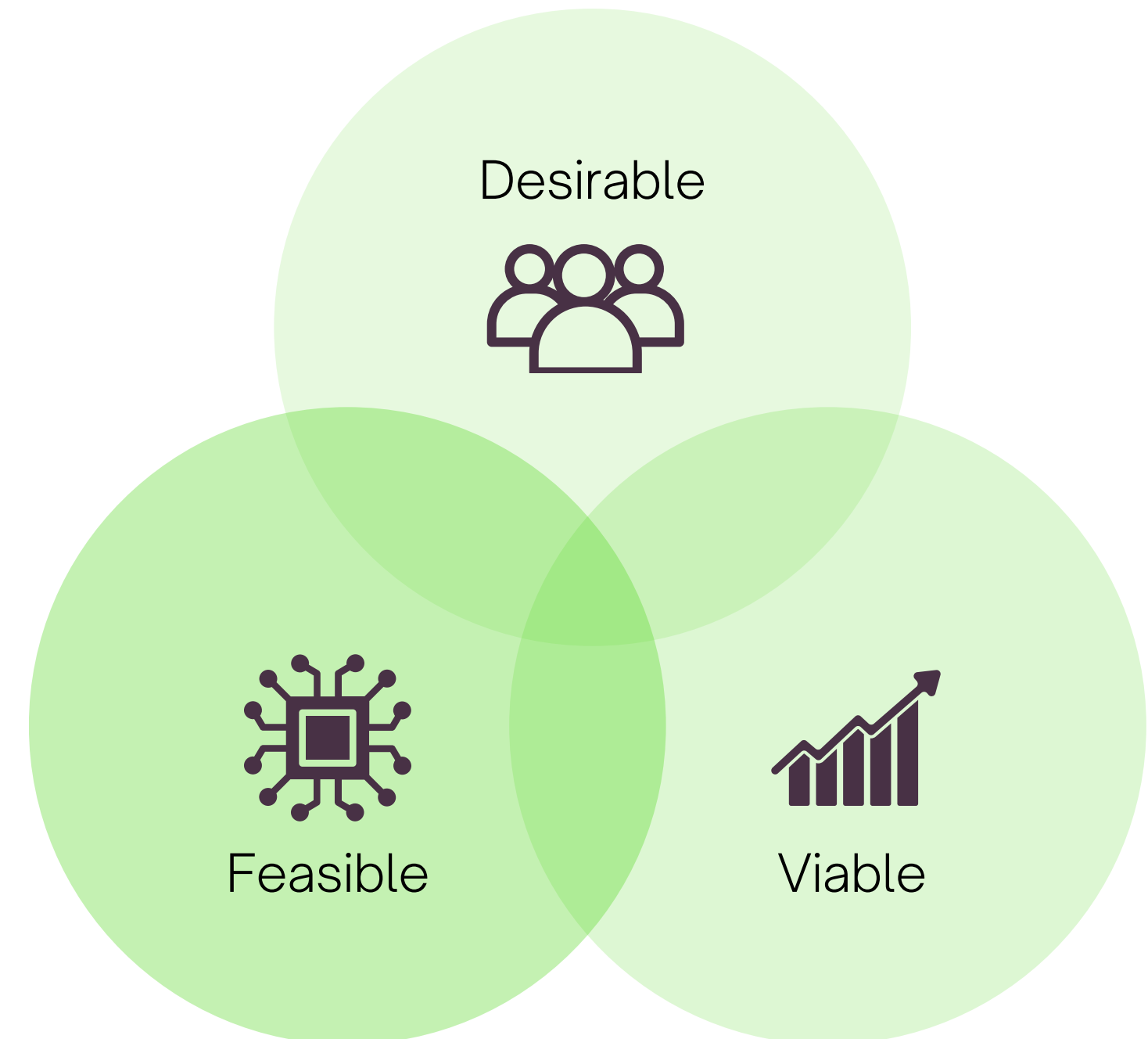
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Design Thinking

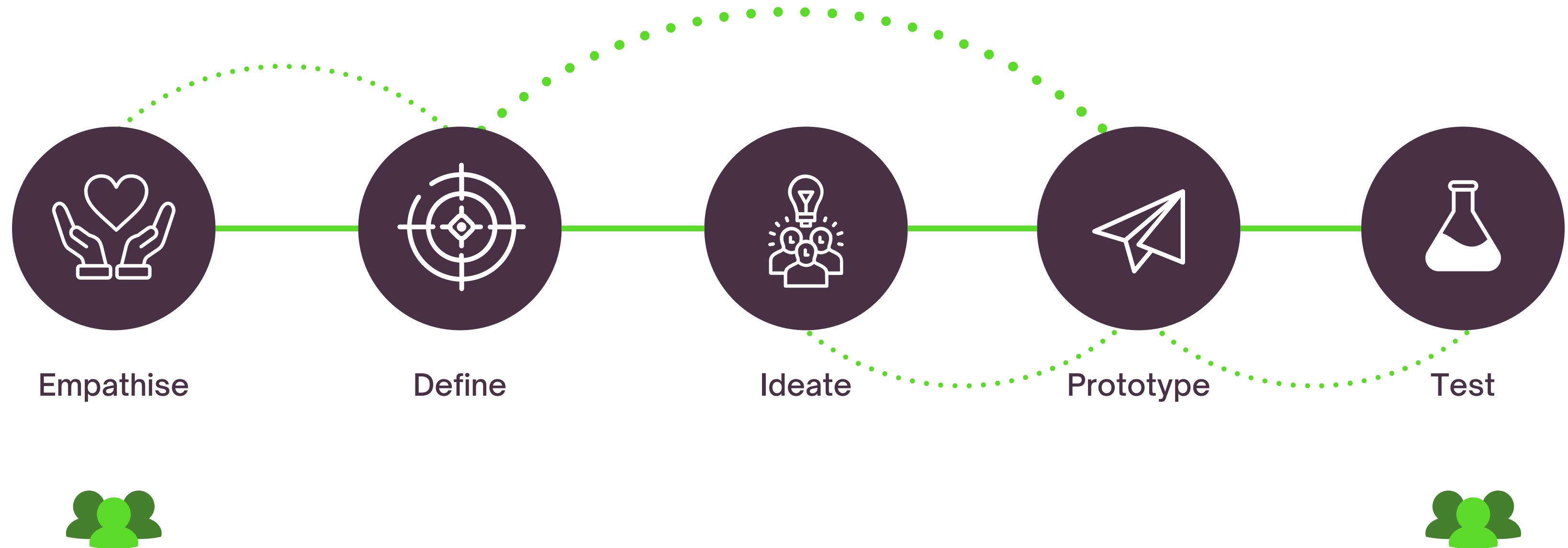


“Design Thinking is a human-centred approach to innovation that draws from the designer’s toolkit to integrate the needs of people, the possibilities of technology and the requirements for business success”

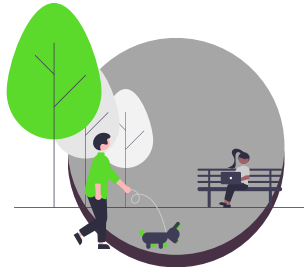
– Tim Brown (2009)



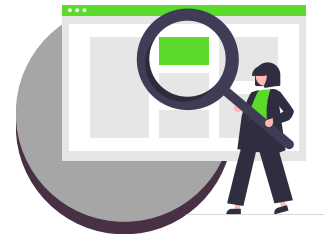
Design Thinking



Discover



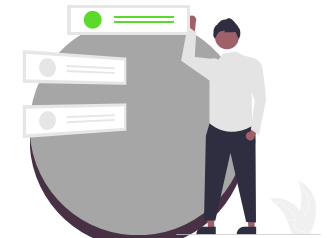
Design Ethnography



Observations



Interviews



Customer Surveys



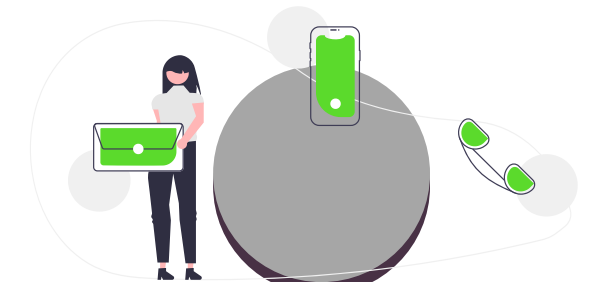
Journey Mapping



Empathy Mapping

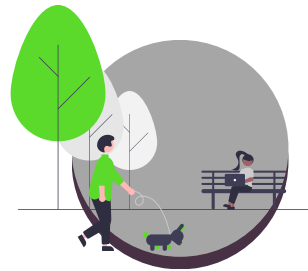
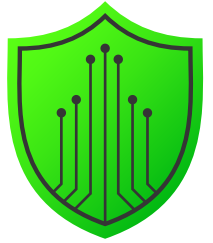


Think Aloud Protocol



Customer Contacts

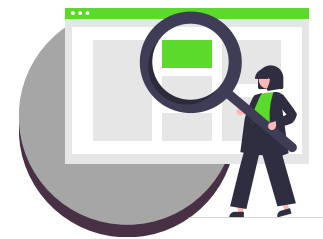
Discover & Test



Design Ethnography

Design Ethnography is concerned with the everyday lives of the people you are designing for.

Researchers try to immerse themselves in the lives of those they are designing for to understand how they can make an impact of their everyday lives.



Observations

Observations are important when conducting research, as people don't often describe or remember their actions accurately.

Through observation researchers can pick up on elements that people omit.



Interviews

Interviews can be much more valuable than focus groups. With focus groups people are sometimes led by others to agree, or disagree.

Interviews allow you to understand people's reasoning and ask follow up questions to gain richer insight.



Customer Surveys

Customer Surveys are useful when you need quantitative rather than qualitative data. Often to validate assumptions throughout the design process.

They are less useful for trying to gain rich qualitative data or insight



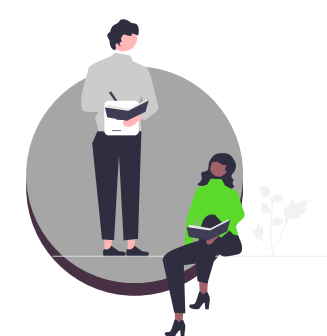
Journey Mapping

Journey Mapping is used to identify high and low points in customer experience, as well as any unnecessary activity or touchpoints along the way.



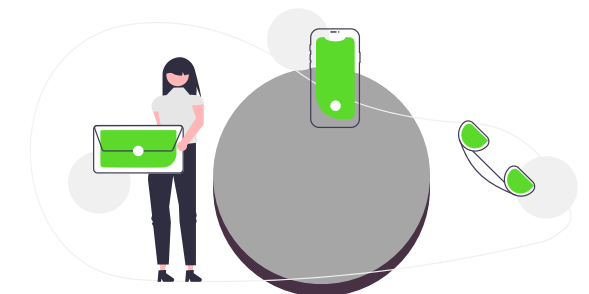
Empathy Mapping

Empathy Mapping is a way of gaining deeper insight by trying to put yourself in the shoes of the customer and understand how they are feeling, what they are thinking, seeing, hearing and saying.



Think Aloud Protocol

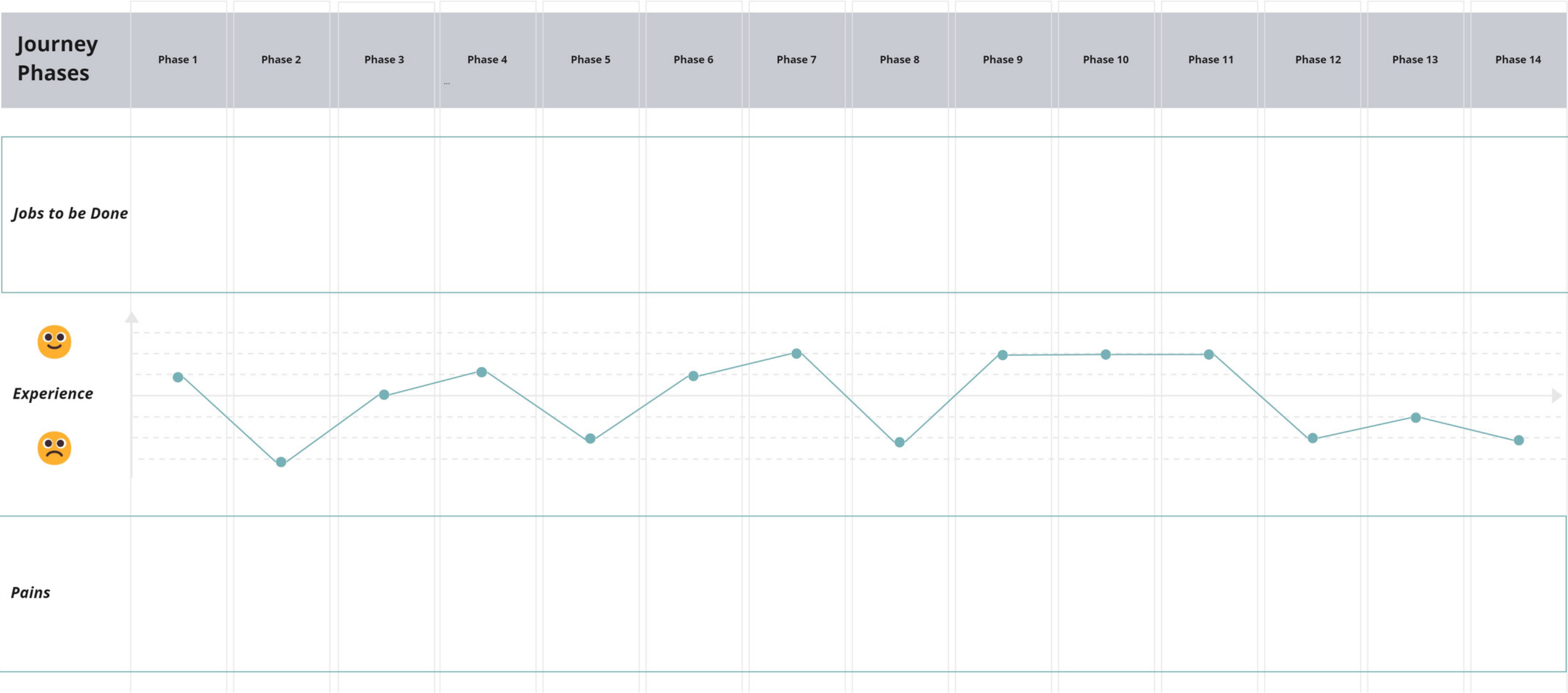
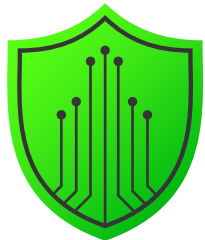
Think Aloud Protocol is when customers talk through the tasks as they are doing them, allowing the researcher to understand why they are doing them in such a way, and what their thought process is throughout.



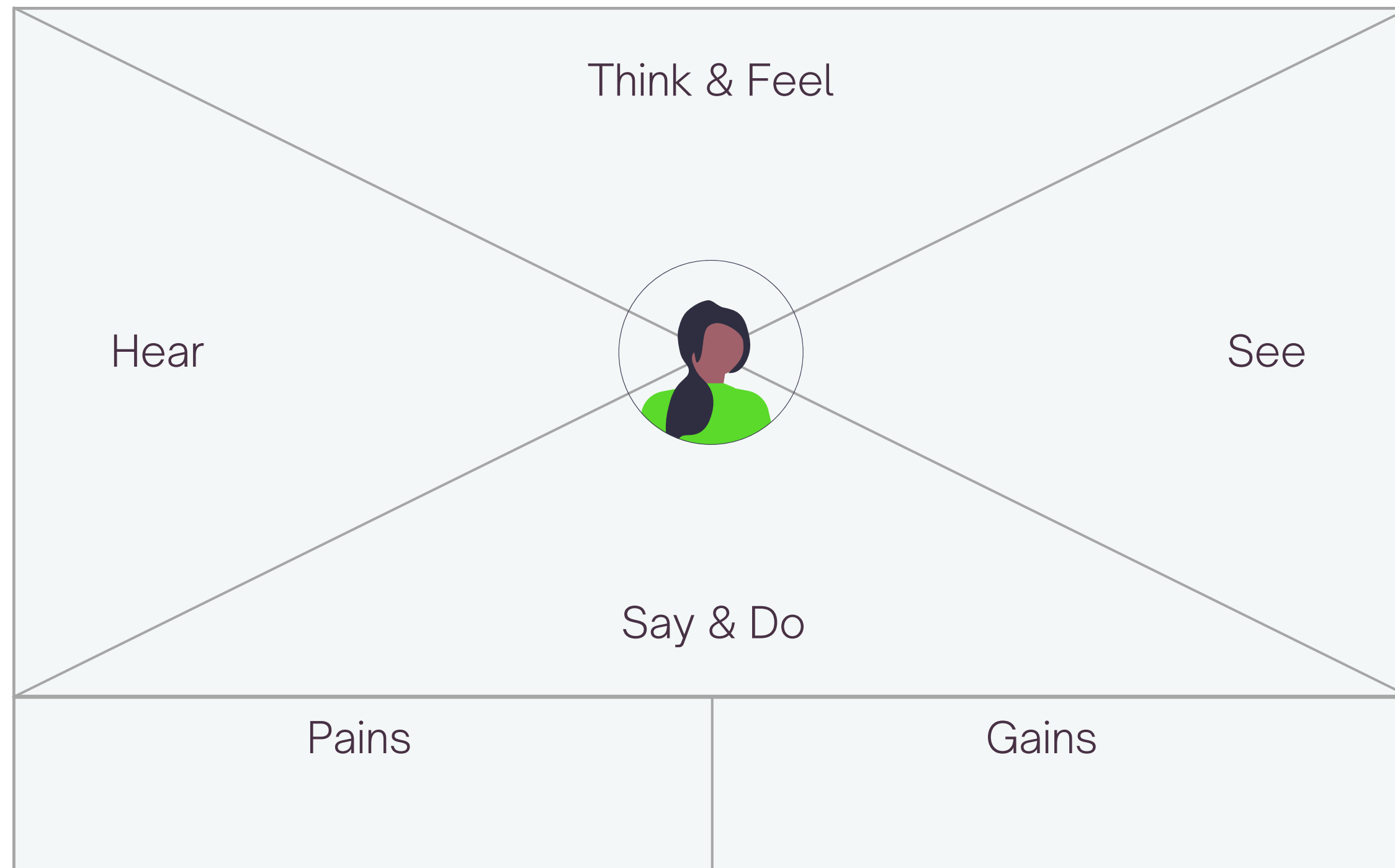
Customer Contacts

Customer Contacts can be recorded for research/design/improvement purposes as well as for training and verification. Listening to these conversations can help gain deeper insight into the pains and motivations of customers.

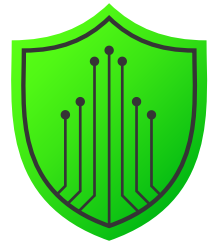
Customer Journey Mapping



Empathy Mapping



Resources



A Day in the Life Worksheet



Dive deep into your (potential) customers' worlds to gain insights about their jobs, pains, and gains. What customers do on a daily basis in their real settings often differs from what they believe they do or what they will tell you in an interview, survey, or focus group.

objective
Understand your customer's world in more detail
outcome
Map of your customer's day

Capture the most important jobs, pains, and gains of the customer you shadowed

| Time | Activity (what I see) | Notes (what I think) |
|------|-----------------------|----------------------|
| | | |
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Empathy Map

Everyone in your organization is driven by different things. The Empathy Map gives you a deep-dive into the underlying motivations of your people to uncover why they are functioning the way they are. The principle is to start with your people and design with their needs in mind. Empathy mapping for organizational (rather than consumer) insights, follows all the same principles, just putting employees or stakeholders at the center.

1

WHO are we empathizing with?

· Who is the person we want to understand?

· What is the situation they are in?

· What is their role in the situation?

2

What do we want them to DO?

· What do they need to do differently?

· What job(s) do they want or need to get done? ·

What decision(s) do they need to make?

· How will we know they were successful?

3

What do they SEE?

· What do they see in the marketplace?

· What do they see in their immediate environment?

· What do they see others saying?

· What do they see others doing?

· What are they watching and reading?

4

What are they SAYING?

· What have we heard them say?

· What can we imagine them saying?

5

What do they DO?

· What do they do today?

· What behavior have we observed? ·

What can we imagine them doing?

6

What do they HEAR?

· What are they hearing others say?

· What are they hearing from friends?

· What are they hearing from colleagues? ·

What are they hearing second-hand?

7

What do they THINK & FEEL?

PAINS

What are their fears, frustrations, and anxieties?

GAINS

What are their wants, needs, hopes and dreams?

1. WHO are we empathizing with?

GOAL

2. What do we want them to DO?

6. What do they HEAR?

7. What do they THIN K & FEEL?

3. What do they SEE?

4. What do they SAY?

5. What do they DO?

PAINS

GAINS

What other thoughts & feelings might motivate their behavior?

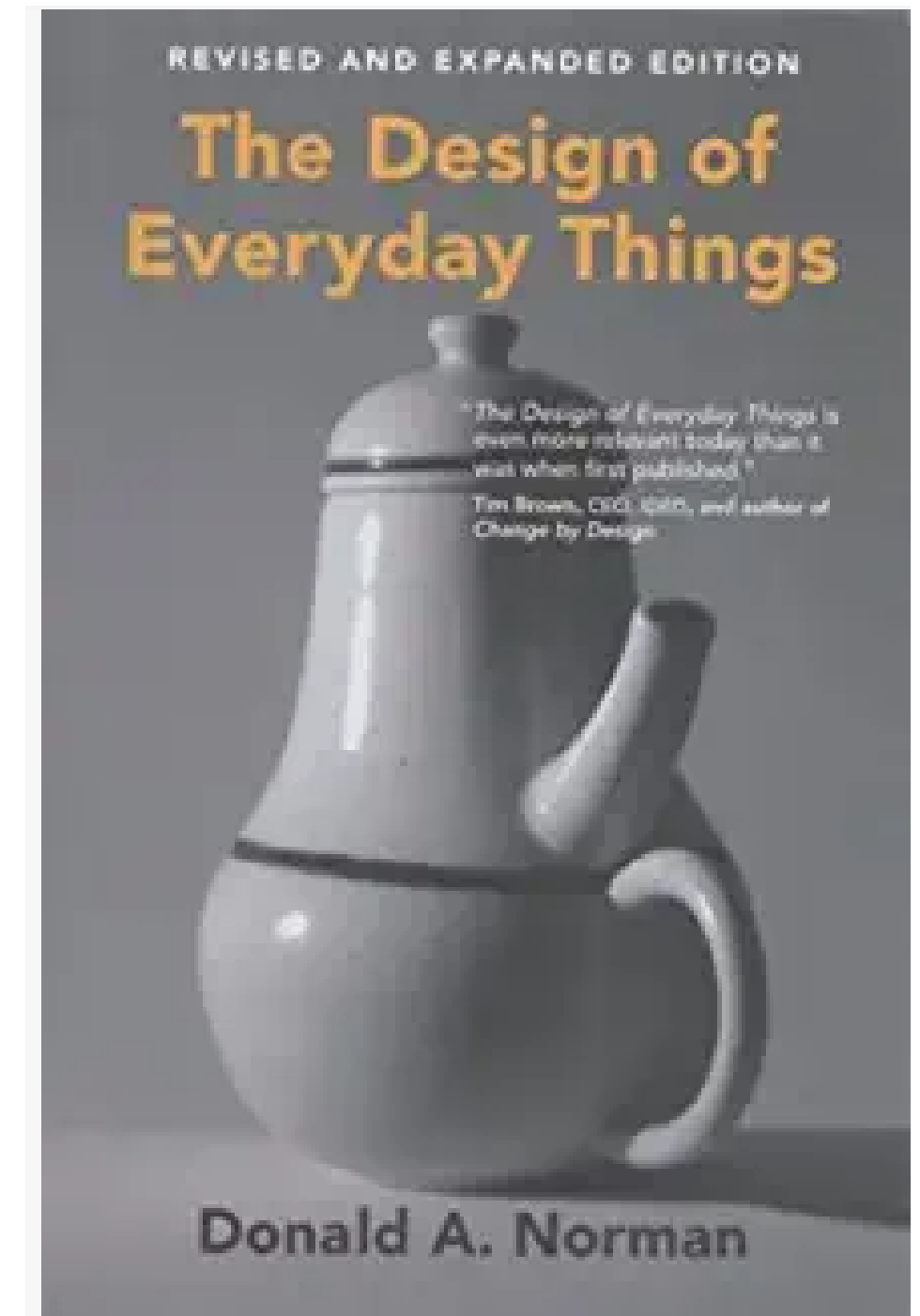
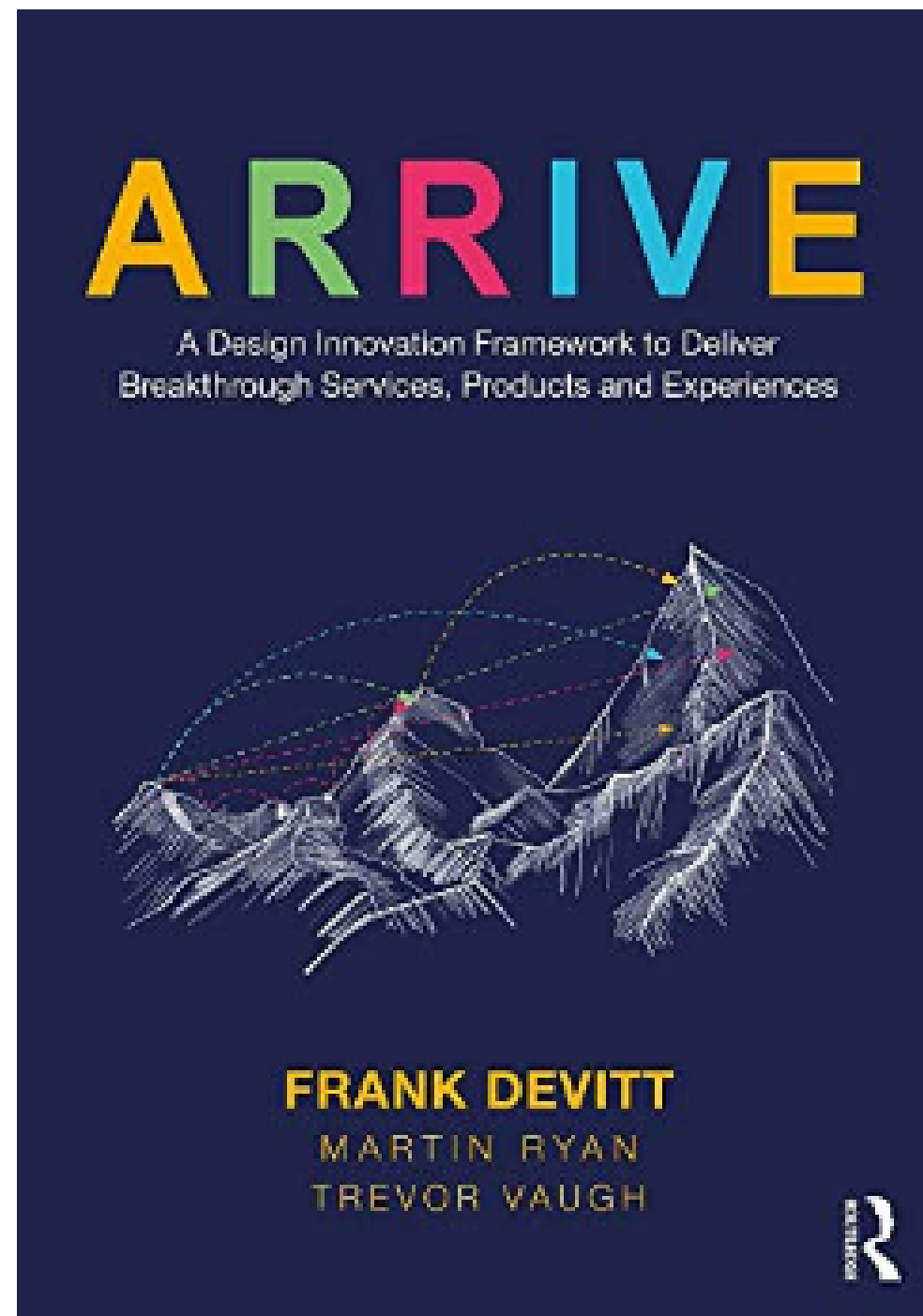
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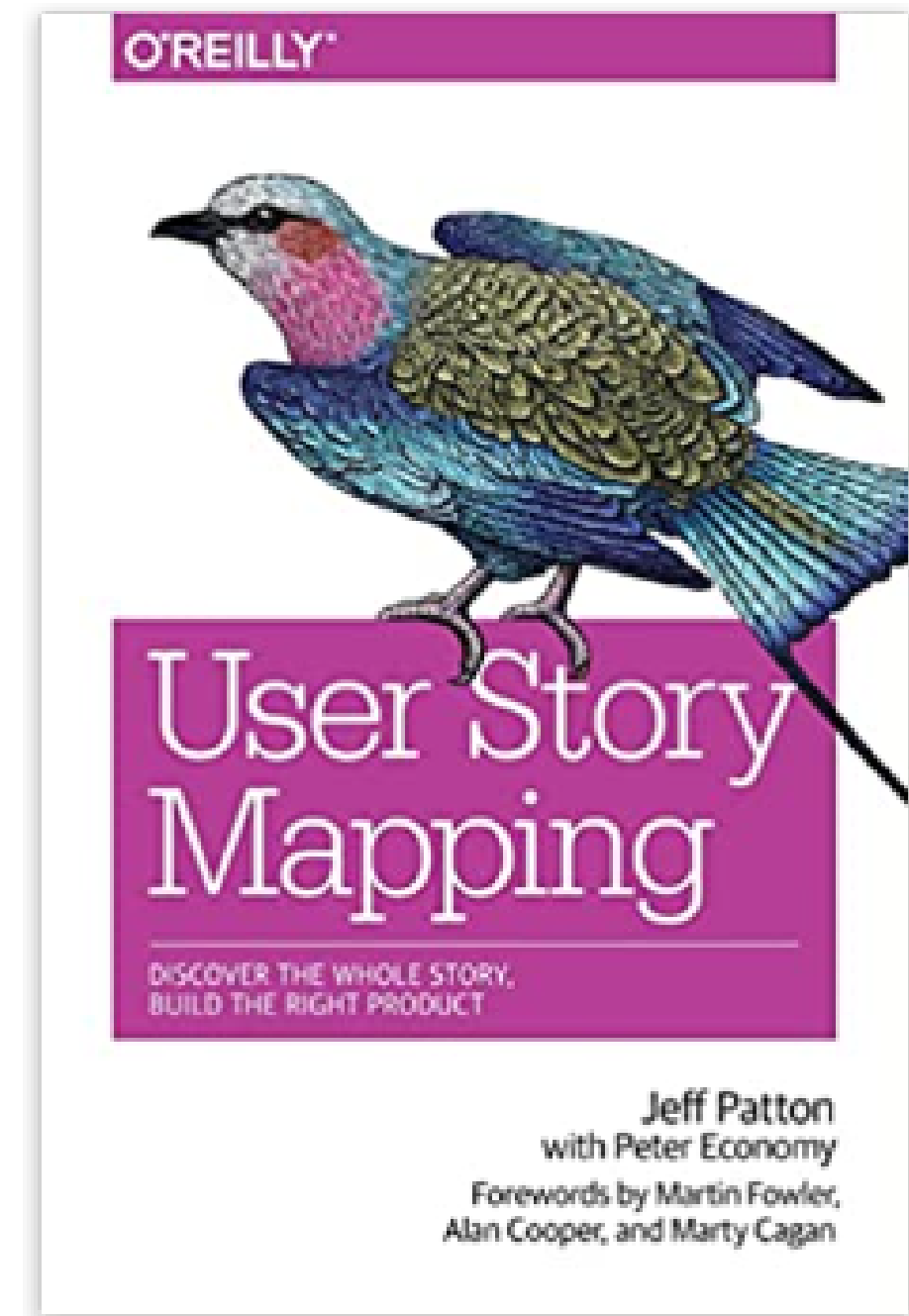
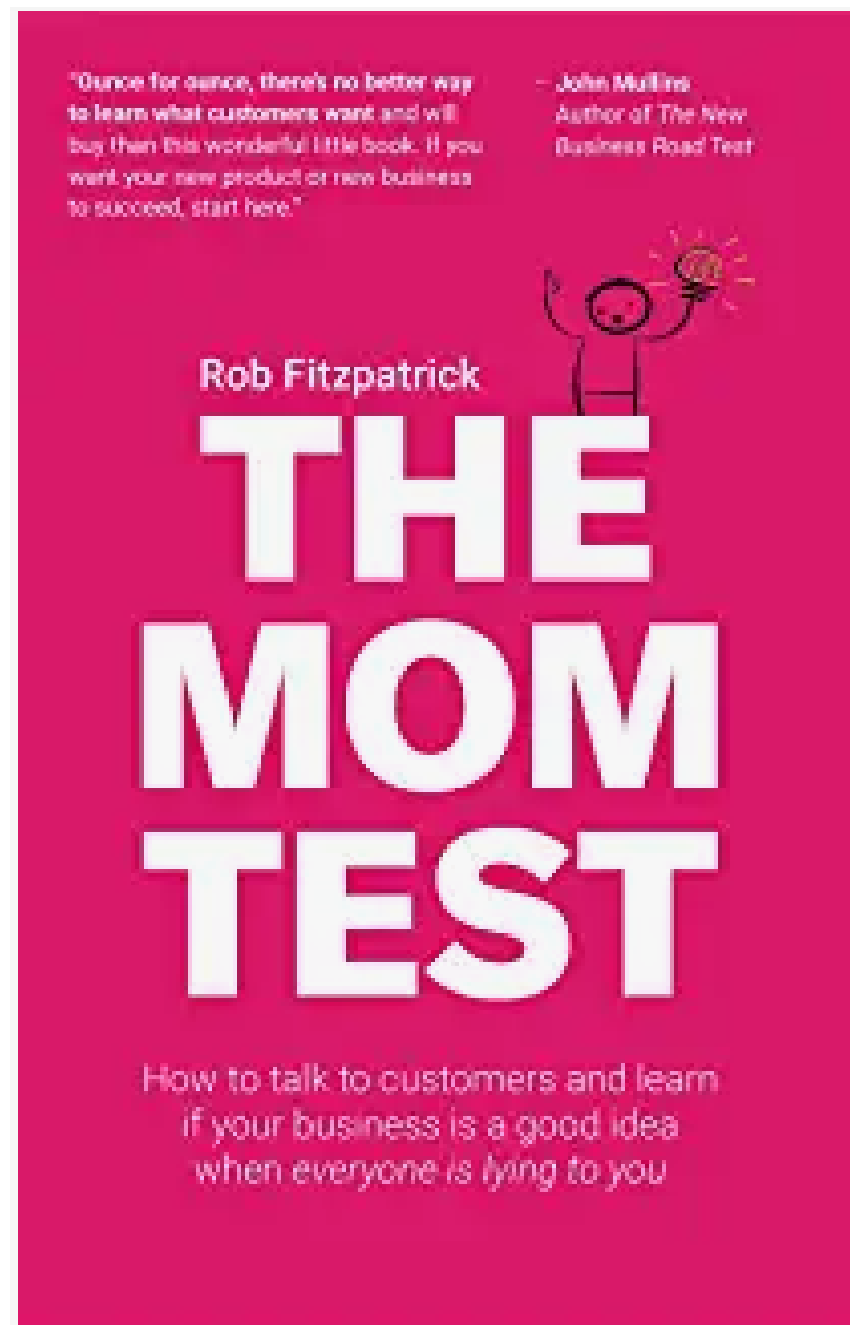
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Resources



Resources



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