

# ASK. ■



And uncover the insight  
you wish you had all along



**B2B Voice of Customer Programs**  
that uncover valuable insight and  
new opportunities, while elevating  
the experience of your customers.

- Grow Revenue and Profit
- Secure Customer Retention
- Be confident you are on the right path



**TONYA BJURSTROM**

Dirby Founder | Voice of Customer for B2B

# You need more than an online survey.

**There is an abundance of valuable insight and new opportunity in your existing customer base.**

But you need more than an online survey to uncover the insight you need to:

- Grow Revenue and Profit
- Secure Customer Retention
- Elevate the experience of your customers
- Build confidence that you are on the right path

In this eBook you will be given examples of the insight you can uncover from your existing customer base - **if you ask the right questions, in the right way, at the right time.**

You will see sample "**right questions**", best practices for asking those questions in the "**right way**", and direction in determining what the "**right time**" looks like for you and your customers.

You will also be provided best practices for Voice Of Customer (VOC) program follow-up and next steps in getting expert guidance in building your VOC programs.

The best practices and the guidance offered here come from decades of successful experience in sales, marketing and business development. Also from lessons learned through the successful creation and implementation of VOC programs by Dirby Founder, and author of this eBook, Tonya Bjurstrom.

To learn more about Dirby visit [www.dirbysolutions.com](http://www.dirbysolutions.com)

To connect with Tonya on LinkedIn:  
<https://www.linkedin.com/in/tonyabjurstrom/>

# ASK. ■

## **Chapter 1**

DATA. DATA. DATA.

## **Chapter 2**

What. How. Why.  
But Who?

## **Chapter 3**

Ask the Right Questions  
In the Right Way

## **Chapter 4**

At the Right Time

## **Chapter 5**

Next Steps



**dirby**

# CHAPTER 1



**DATA.**

**DATA.**

**DATA.**



# What insight, if you could uncover it, would have the greatest impact on your business right now?

Take a moment to think about this question.

Write down your answer. We'll come back to it in chapter 3.

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## The sweet spot.

What a great expression.

Just enough. Not too much, not too little.

A set of conditions that will result in the most desirable outcome.

Finding the sweet spot when working with customer data can be challenging.

Too much can be difficult to process and can lack context.

Too little can lack significance and point you in a wrong direction.

It is important to understand the different types of customer data that can be collected and how you can best apply each type.

But more important than the data, is the insight that is generated from it. More important still, what is the insight you need?

## What. How. Why.

In this first chapter we will explore what you can learn from customer insight, options for how you collect customer insight, and why Voice of Customer (VOC) interviews are the flavor of VOC that drive Dirby's high-touch programs.

And why that flavor is "**oh, so sweet**".

# WHAT

On a scale of 1 to 5, how satisfied were you with your experience today?

On a scale of 1 to 10, how likely are you to recommend us to a friend or colleague?

**"Enough of the online surveys! Is there another option?"**

The answer is **YES**. There is another option. But you need to be committed to more than checking a task off your list.

## ✓ Send a survey to customers

There is an abundance of valuable insight and new opportunity in your existing customer base. But you need to ask the right questions, in the right way, at the right time.

**And you definitely need more than a "on a scale of 1 to X" online survey question.**

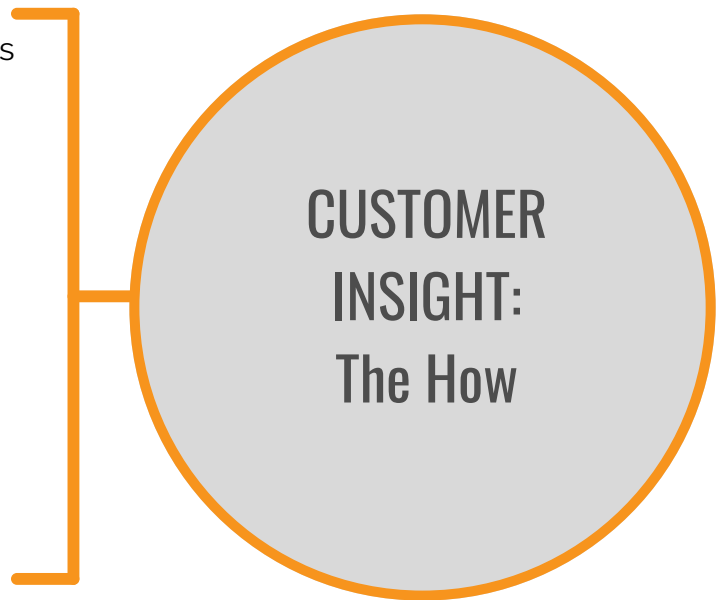
The diagram below offers examples of the deep insight that can be uncovered via customer feedback data. **Who better to help you understand why someone should buy your product or service, than someone who has bought your product or service?**

The same concept applies to improving your sales process, generating more quality leads, better understanding your competition, defining your product roadmap and elevating the experience of your customers. **Your customers are the expert resource.**

### CUSTOMER INSIGHT: The What

- Why are deals stuck in the pipeline?
- Are we at risk of customer churn?
- Does our marketing reflect the real value we bring to customers?
- What is our Ideal Customer Profile (ICP)?
- Does our product roadmap match our customers' future needs?
- How do our customers view the competition?
- Why did our customers choose us over the competition?
- How do we improve the experience of our customers?

- Voice of Customer (VOC) Interviews
- Net Promoter Score (NPS)
- Customer Satisfaction (CSAT)
- Social Media
- Focus Groups
- Website Usage Data
- User Data
- 3rd Party Data
- Online Reviews



The above diagram offers examples of different ways you can collect customer feedback - some are best used to collect quantitative data, others qualitative data.

**Quantitative** data refers to information that can be quantified - counted or given a numerical value. **Qualitative** data is descriptive - expressed in language rather than numerical values. Think comments (qualitative), versus ratings (quantitative).

Both quantitative and qualitative data are valuable when collecting customer feedback, but only if applied appropriately.

For example, NPS is a quantitative measurement, typically applied by asking the "on a scale of 1 - 10, how likely are you to recommend us" question that was previously mentioned.

Although NPS can be a great tool for monitoring trends in customer satisfaction, it lacks the qualitative information needed for deeper context - to clearly understand what is impacting the 1 - 10 rating that has been given.

Through the remainder of this eBook we will explore best practices in completing 1:1 **Voice of Customer (VOC) Interviews**.

VOC interviews are the most effective tool for uncovering the qualitative data that is both specific and actionable.

It is also the only customer feedback tool that allows you to **elevate the experience** of your customers, while in the process of uncovering valuable insight.

**HOW**

When was the last time you took an online survey and thought, "Wow, that was a great experience. I feel really valued as a customer."

Was your answer to this question "Never"?  
Online surveys do not make customers feel valued.

# WHY

When collecting qualitative data from customer interviews there is an opportunity to elevate the experience of your customers and increase customer engagement.

An opportunity for your customers to feel valued - not only have you invested in a program to improve their experience as a customer, you are also seeking their industry expertise and candid feedback regarding your product or service.

A successful customer interview does not feel like a sales call or a marketing survey.

It feels like an easy conversation.

There a sweet spot in the **type** of customer data you collect, and the **amount** of customer data you collect. And there is a sweet spot in **how** the customer data is collected.

High-touch VOC interview programs elevate the experience of your customers, while you are in the process of you uncovering valuable customer insight.



Customers feel valued, their insight worthy of more than an online survey.





# CHAPTER 2

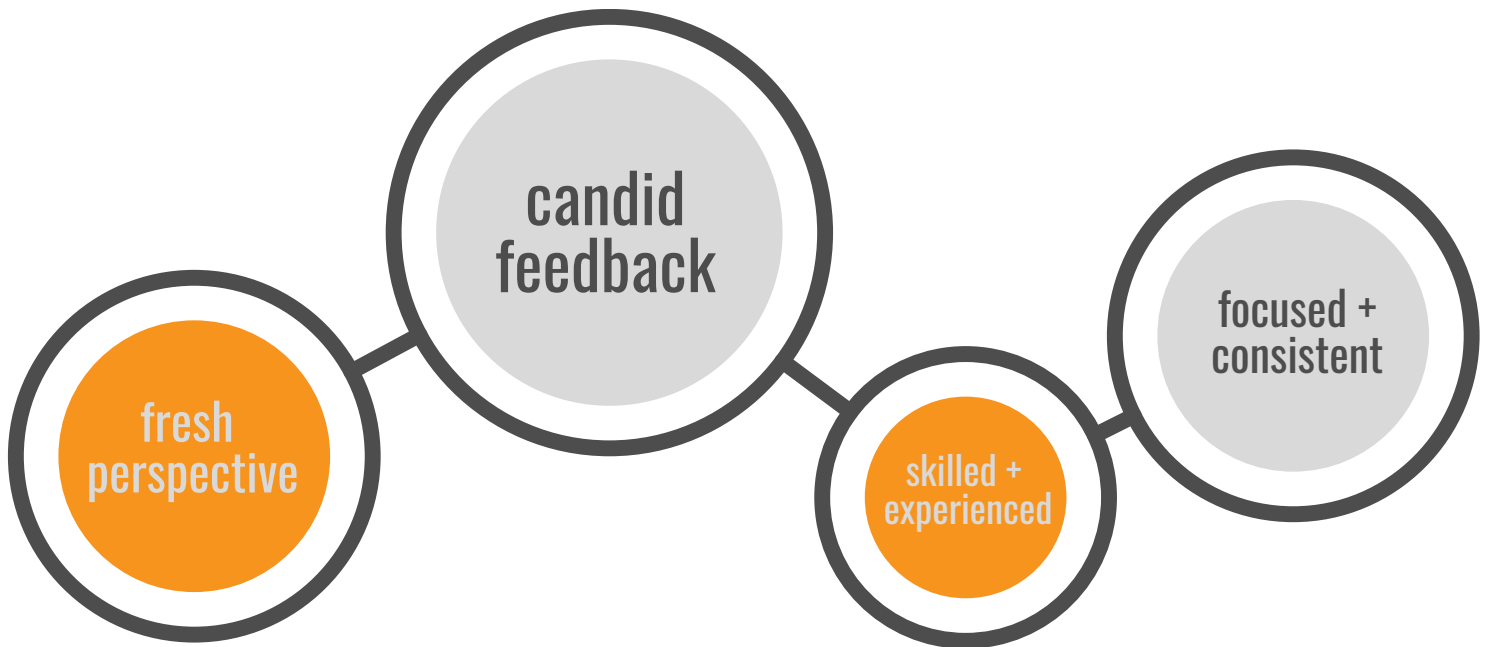
WHAT.  
HOW.  
WHY.

BUT  
WHO?



**Connecting to the Voice of your Customer should not be a by-product of sales and marketing. A successful VOC program requires intention.**

And a successful VOC program greatly benefits from an experienced and professional third-party guiding the way and implementing best practices.



## **FRESH PERSPECTIVE**

An experienced third-party will offer you a fresh perspective, without the bias or assumption that naturally exists inside every organization.

A third-party isn't invested in your current marketing strategy or sales process.

A third-party doesn't have history with a significant, but difficult customer.

A third-party can hear feedback without feeling defensive or dismissive.

And an experienced third-party will offer fresh ideas that are aligned to best practices.

**When you believe you know the answer, you fail to ask the right question.**

**The momentum of assumption...**

## CANDID FEEDBACK

It is human nature to feel more comfortable providing open and candid feedback to a third-party.

And for some, it is about more than just comfort, they feel safer providing feedback to an unknown, unbiased third-party.

Create space for your customers to feel comfortable and safe sharing candid feedback regarding their experience with your brand.

## SKILL AND EXPERIENCE

Asking the right questions, in the right way, at the right time, is a practiced skill.

Sales calls are the most frequent communication with customers. But a sales call is NOT the same as a customer interview. For many reasons. Not the least of which is that a goal of a customer interview should not be to build a relationship between the "interviewer" and the "interviewee".

The goal of a customer interview is to uncover valuable insight, while creating a positive experience for the customer. That is it.

## FOCUS AND CONSISTENCY

Too often, VOC is a by-product of sales and marketing.

Successfully uncovering customer insight, while creating a valuable customer experience, requires focus and consistency.

Valuable insight can be uncovered to support a specific project or initiative. A focused VOC interview program, built on a single set of interviews, will get what you need.

But the greatest impact of a VOC program comes from aligning customer interviews to critical points in the Customer Experience Lifecycle (CEL), tapping into timely, specific insight that is consistently delivered to your team.

**You will learn more about the Customer Experience Lifecycle (CEL) in Chapter 4.**

Regardless of who implements your program, internal or third-party, keep this chapter in mind as you select who will take the lead.

# CHAPTER 3

ASK THE  
RIGHT  
QUESTIONS.

IN THE  
RIGHT WAY.



# Best practices in building interview questions and completing interviews



The first step in Dirby VOC programs is identifying the **Key Desired Insights, or KDIs**.

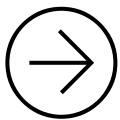
Recall the question asked in the first chapter of this eBook:

**What insight would have the greatest impact on your business right now?**

Your answer to this question is the starting point for identifying KDIs.

KDIs keep VOC programs focused on uncovering the insight you need most. And KDIs drive the creation of strategically phrased and ordered interview questions.

Interview questions should act as a guide, not a script, to VOC interviews. The objective is to uncover insight, not just get answers to questions. Interview questions should be a catalyst, while KDIs are the interview focus.



**Reach out for more information on developing impactful KDIs. [connect@dirbysolutions.com](mailto:connect@dirbysolutions.com)**

## Building the questions

- 10 - 12 questions is appropriate for a 30 minute interview.
- Review previously completed customer surveys to identify data that needs more context - more qualitative feedback.
- Questions should be open ended and carefully reviewed to ensure they do not "lead" the customer to an assumed response.
- Questions referring to past experiences should ask customers to recall specific situations or provide specific examples.
- Questions should be phrased in a way that feels genuine to the interviewer that is asking the questions. For example, "This next question may seem a bit hokey, but it is one of my favorites. How does using this product make you "feel"?"

**At the opening of a customer interview the interviewer should set a comfortable and open tone, instructing the customer to take the time needed to provide a specific response to questions. Experienced interviewers are comfortable with "awkward silence".**

# Requesting participation in your VOC program

Requests made to customers to participate in a customer interview should be made by individuals in both executive and customer facing roles. This reflects organization wide support for the program. The requests should be made according to an established multi-touch, multi-medium cadence that is spread over several weeks.

The customer should be asked to commit 30 minutes of time, but the interviewer should block 60 minutes to allow for extended conversations and completing interview notes.



## Examples of Key Desired Insights (KDIs)

What are the top 3 purchase drivers for our product?

How significant was pricing in the decision to work with us over the competition?

What features of our product bring our customers the most value?

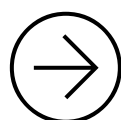
What are the top 3 items our customers want to see on our product roadmap?

What is our Ideal Customer Profile (ICP)?

How do our customers describe us to others?

### Are your Channel Partners your real customers?

Maybe your VOC program is **Voice of CHANNEL**



**Dirby builds VOC programs for both end user customers and the channel.**  
**[connect@dirbysolutions.com](mailto:connect@dirbysolutions.com)**

# Sample Questions - Customer Interviews



Recall to when you selected this product or service. What were the primary issues you were trying to solve?

Again, looking back on the decision to purchase this product or service, at what point in the sales process did you know you wanted to move forward?

What are the measurable impacts this product or service has had on your business?

There are a number of different ways to price products and services. But, based on your experience in the industry, what pricing models work best?

What is the biggest problem you are trying to solve in your business right now?

What is the biggest problem you will be trying to solve in your business 5 years from now?

What action, if taken, would most improve your experience as a customer?

Looking back on your experience with the company, product or service, please recall a specific situation when you felt pleased with your experience.

Looking back on your experience with the company, product or service, please recall a specific situation when you were not so pleased.

What word or words would you use to describe how you "feel" about using this product or service?

What would you tell others as to why they should work with this company, or buy this product or service?

What did I not ask you today that I should have?

# CHAPTER 4

# AT THE RIGHT TIME





## THE CUSTOMER EXPERIENCE LIFECYCLE (CEL)

The customer experience lifecycle begins the moment your customer is introduced to your brand.

From that moment on there are numerous opportunities to create touchpoints that will help you better understand how to improve the experience of your customers.

**And better understand how to more effectively grow your business.**

**But timing matters.**

Most companies schedule customer conversations based on their initiatives, their agenda, their schedule.

For example, Quarterly Business Reviews (QBR's) with customers often precede QBR's for sales teams. I agree this is a great time for sales reps to speak with customers about budgets, forecasts and new product offerings.

However, these conversations are not the same as a customer interview. And these conversations are not relevant to the experience of the customer.

When building a VOC program, take a different perspective-  
**the customer's perspective.**

- **New customer onboarding complete**
- **Customer's annual contract renewal**
- **Turnover of a customer's key stakeholder**

And critical points in the Customer Experience Lifecycle (CEL) are opportunities to uncover timely, valuable customer insight.

**If you want to better understand the experience of your customers, align interviews to critical points in the experience of your customers.**

# What are the critical points in your Customer Experience Lifecycle?

Below is a Dirby guided example of a **Customer Experience Lifecycle (CEL)**.

Yellow circles represent various touchpoints with your customers, orange circles represent critical touchpoints (or milestones) that are aligned to a VOC customer interview.

A focused and consistent VOC program, aligned to critical points in the CEL, provides the structure and process needed to keep communication active and open with your existing customers.

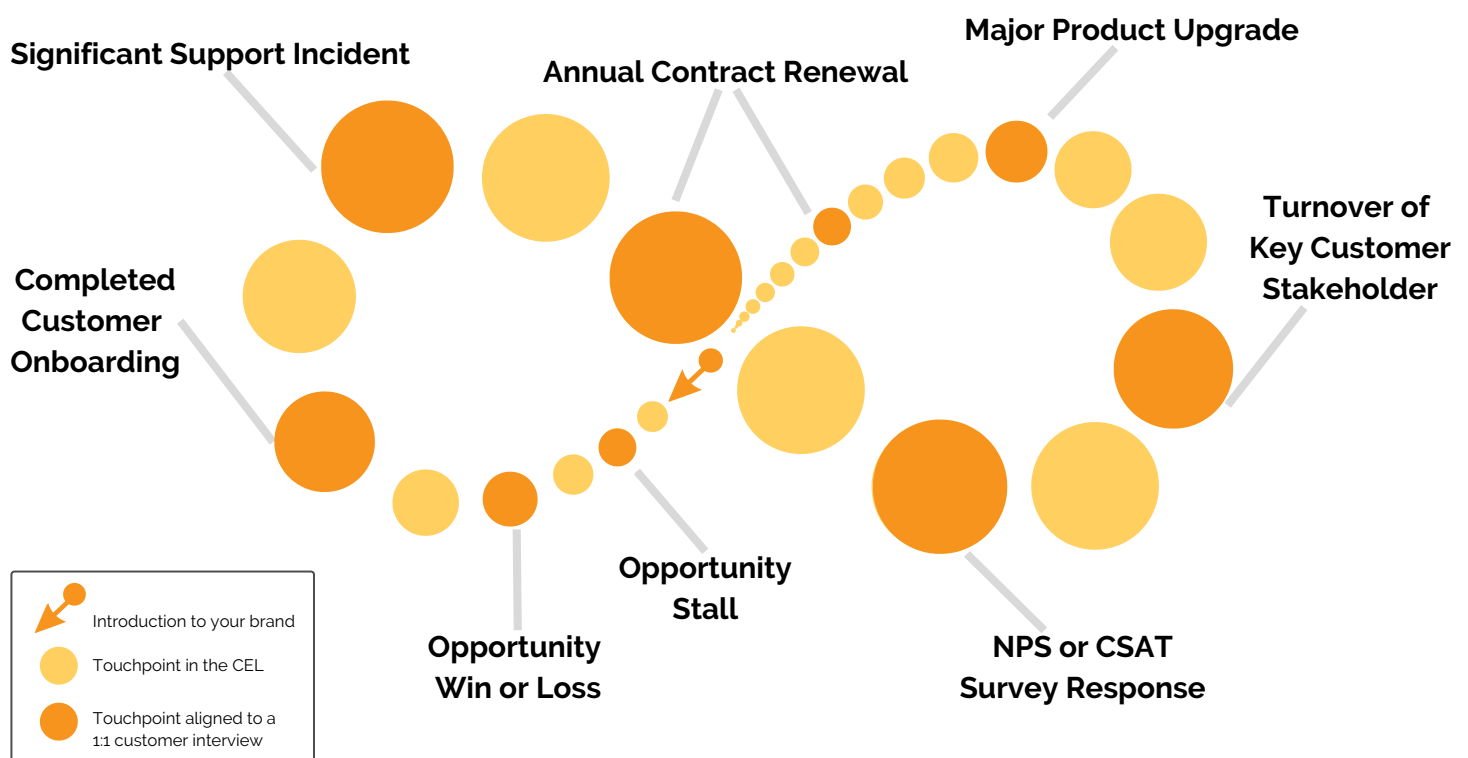
It also provides the structure and process needed to feed your sales and customer success teams with robust talking points that can be used during sales calls.

Expansion opportunities that arise will not be missed.  
Customer issues that arise will be known and can be dealt with in a timely manner.

**And customer churn will be reduced.**

**It costs a lot more to win a new customer than it does to keep an existing customer.**

**Customer churn is dangerous, painful and expensive.**



# CHAPTER 5

# NEXT STEPS



# Best practices in VOC program follow-up

A common complaint from customers who respond to surveys is that they never hear anything back.

They have taken the time to provide their feedback, but their vendor has not taken time to acknowledge the feedback. It feels like a waste.

## **Are you losing data and opportunity in the BLACK HOLE of customer feedback?**

If there is not a commitment to follow-up with customers who participate in your VOC program, I suggest not seeking feedback from your customers at all.

Remember, VOC interviews create an opportunity to elevate the experience of your customers. Don't drop the ball on the follow-up.

## **SAY THANK YOU**

Send a hand written thank you note to each client who participates in your VOC program. Hand written notes reflect a deeper appreciation than email.

This is also an excellent opportunity to send a small gift.

## **REVIEW THE REPORTS**

Successful VOC programs should include multiple reports, offering varying levels of detail to accommodate varying levels of responsibility within an organization.

Individuals directly responsible for client relationships should read all reports, including any detailed notes for each interview.

Establish a strategy for addressing any concerns or issues that were raised by each customer and schedule a follow-up discussion.

During the follow-up discussion it is not necessary to have a resolution to each concern or issue, but it is important to let the client know they have been heard and their feedback is being taken under consideration.



## CASE STUDIES AND TESTIMONIALS

Pull impactful quotes from the customer interviews and request permission from customers to use them in your marketing. Case studies that align to specific initiatives, or vertical industries, can build thought leadership for both you and your customer.

Case studies and testimonials are great marketing tools, but also strengthen the commitment your customer has to your brand.

## CONTINUE THE CONVERSATION

To keep the flow of active, open communication going with customers, establish a plan for ongoing customer interviews.

Interviews can be scheduled at regular intervals, such as on an annual basis or at contract renewals. Or interviews can be scheduled on an ongoing basis at critical points in the Customer Experience Lifecycle (CEL).

**Refer back to Chapter 4 for guidance on establishing the critical points in your CEL.**

## CUSTOMER ADVISORY GROUP

Strategically created and facilitated customer advisory groups build a community of your best customers - and create a ready resource for you when insight is needed.

These groups (or councils, boards, guilds, or whatever you decide to call it), can spark new ideas, drive industry thought leadership and build loyal brand champions.

### **Questions to answer if you move forward with a customer advisory group:**

What are the primary objectives of the group?

What commitments are you asking from the customers who participate?

What benefits are you offering to customers who participate?

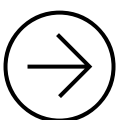
How often will you meet, and how long will you meet for?

Will meetings be recorded and available after the meeting?

What criteria will you use to determine the customers invited to join the group?

Who are the internal resources that will participate in the group?

Who are the experienced resources that will create, facilitate and manage the group?



**Connect with Dirby for more guidance on creating VOC programs, as well as creating a Customer Advisory Group. [connect@dirbysolutions.com](mailto:connect@dirbysolutions.com)**

Like a conversation over coffee,  
Dirby interviews feel easy.

Your customers feel valued,  
their insight worthy of more  
than an online survey.

You feel confident,  
you now have the insight you need.

Insight you wish you had all along.



## VOICE OF CUSTOMER PROGRAM OPTIONS

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### **Voice of Customer (VOC)**

Uncover valuable, specific insight to support a specific project or initiative.  
Be more effective in sales, marketing, customer success, product development.

### **Voice of Customer: Engagement (VOCE)**

An ongoing program with interviews aligned to critical points in your customers' experience, consistently delivering timely insight and new opportunity, while increasing customer engagement.

### **Voice of Customer: Advisors (VOCA)**

Strategically created and facilitated, this program builds a community of your best customers, pulling them closer to your team. Spark new product and service ideas, expand industry mindshare and create loyal brand champions.



Tonya Bjurstrom is the Founder of Dirby and the Voice of Customer for B2B.

To learn more about how to work with Dirby, visit [www.dirbysolutions.com](http://www.dirbysolutions.com) or email [connect@dirbysolutions.com](mailto:connect@dirbysolutions.com).

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