

UC Berkeley – IAG  
COPPEAD  
**Tips for Setting up Customer  
Interviews**

# Some Tools to Use

- Deconstruct Customer Segments
- LinkedIn
- Twitter
- Facebook
- Google
- Conferences
- Competitors

# Deconstruct Customer Segments

- What is their job title?
- What industries/companies do they work for?
- What are some ‘keywords’ you can use?

Use the answers to these questions in your search

Example: Deconstructing the customer segment: "VP of Sales managing a team of 5+ using a CRM tool" gives us the job title, company size, and keywords that can be used for search on LinkedIn, Twitter, Facebook, Google.

# LinkedIn

- LinkedIn Groups - Areas where individuals of similar experience and passion interact.
- Great way to find potential customer interview candidates
- Leverage the networks of your peers within the organization.

# LinkedIn Groups

The screenshot shows the LinkedIn interface with a blue header bar. The top navigation includes 'Home', 'Profile', 'My Network', 'Jobs', 'Interests', 'Business Services', and a 'Try Premium for free' button. The main content area has an orange header with 'My Groups' and 'Discover' links. Below is the group profile for 'Social Media Manager Pro'.

**Social Media Manager Pro**  
12,749 members  
✓ Member

**Start a conversation with your group**  
Enter a conversation title...

**Conversations** Jobs

Catrice Longton CEO at Mass Planner ... 3h  
Understand the trouble-free way to have your tweets more shareable not to mention reap the rewards.

**ABOUT THIS GROUP**  
Network of Social Media Managers and Social Marketing Professionals to connect with each other & share tips and ideas.  
[Group rules](#)

**MEMBERS** 12,749 members  
Invite others

# LinkedIn Groups

The screenshot shows the LinkedIn homepage with the search bar at the top. Below it, the main navigation menu includes Home, Profile, My Network, Jobs, Interests, Business Services, and Try Premium for free. A notification bar indicates 2 messages and 1 new connection. The main content area features the 'Social Media Manager Pro' group profile, which has 12,749 members and the user is marked as a Member. The group's description is: "Network of Social Media Managers and Social Marketing Professionals to connect with each other & share tips and ideas." It includes a 'Start a conversation with your group' button, a text input field for a title, and a 'Group rules' link. On the left, there's a 'Conversations' section showing a recent post from Catrice Longton. The right side displays a preview of the group's member count and a 'Invite others' button.

Social Media Manager Pro  
12,749 members  
Member

Start a conversation with your group

Enter a conversation title...

Catrice Longton  
CEO at Mass Planner

... 3h

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Group rules

MEMBERS 12,749 members

Invite others

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# Individual Profile

in®

Search for people, jobs, companies, and more... Advanced

Home Profile My Network Jobs Interests Business Services Try Premium for free

Business Master's Degree - Univ. of Miami Specialized Master's Programs for Business Professionals. I [Read More »](#)



**Bibhash Chakrabarty**  
Data Scientist at Fidelity Investments  
Bengaluru Area, India | Outsourcing/Offshoring

Previous Education: Hewlett-Packard, GENPACT LLC, Empower Research  
Assam University

[Send a message](#) [Endorse](#) 500+ connections  
Connected 2 days ago

Relationship Contact Info partners

Email: bibhash6@yahoo.co.in Phone: 91-9740143776 (Mobile)

LinkedIn: <https://in.linkedin.com/in/bibhashchakrabarty>  
Website: [Blog](#) [Company Website](#)

[Edit this contact info](#)

Background

1st

Work with us at **Fidelity Investments**

**Fund Reporting Manager**  
Merrimack, US-NH [Apply now »](#)

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Providence, US-RI [Apply now »](#)

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Durham, US-NC [Apply now »](#)

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**People Also Viewed**

 **Nitin Hardeniya**  
Data Scientist at Fidelity Investments

 **Debasis Bal**  
Senior Director, Data Science at Fidelity Investments

 **Vineel Gujar**  
Lead Data Scientist at Fidelity Investments

 **Aravind Chandramouli**  
Data Scientist at Fidelity Investments

 **Cureogen Venkatesan**

# Individual Profile

in Advanced 2 1

Home Profile My Network Jobs Interests Business Services Try Premium for free

Business Master's Degree - Univ. of Miami Specialized Master's Programs for Business Professionals. [Read More »](#)

**Bibhash Chakrabarty**  
Data Scientist at Fidelity Investments  
Bengaluru Area, India | Outsourcing/Offshoring

Previous Education Hewlett-Packard, GENPACT LLC, Empower Research  
Assam University

[Send a message](#) [Endorse](#) 500+ connections  
Connected 22 days ago

Email [bibhash6@yahoo.co.in](mailto:bibhash6@yahoo.co.in) Phone [\(Mobile\)](tel:91-9740143776)

LinkedIn <https://in.linkedin.com/in/bibhashchakrabarty>  
Website [Blog](#) [Company Website](#)

[Edit this contact info](#)

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**Vineel Gujar** Lead Data Scientist at Fidelity Investments

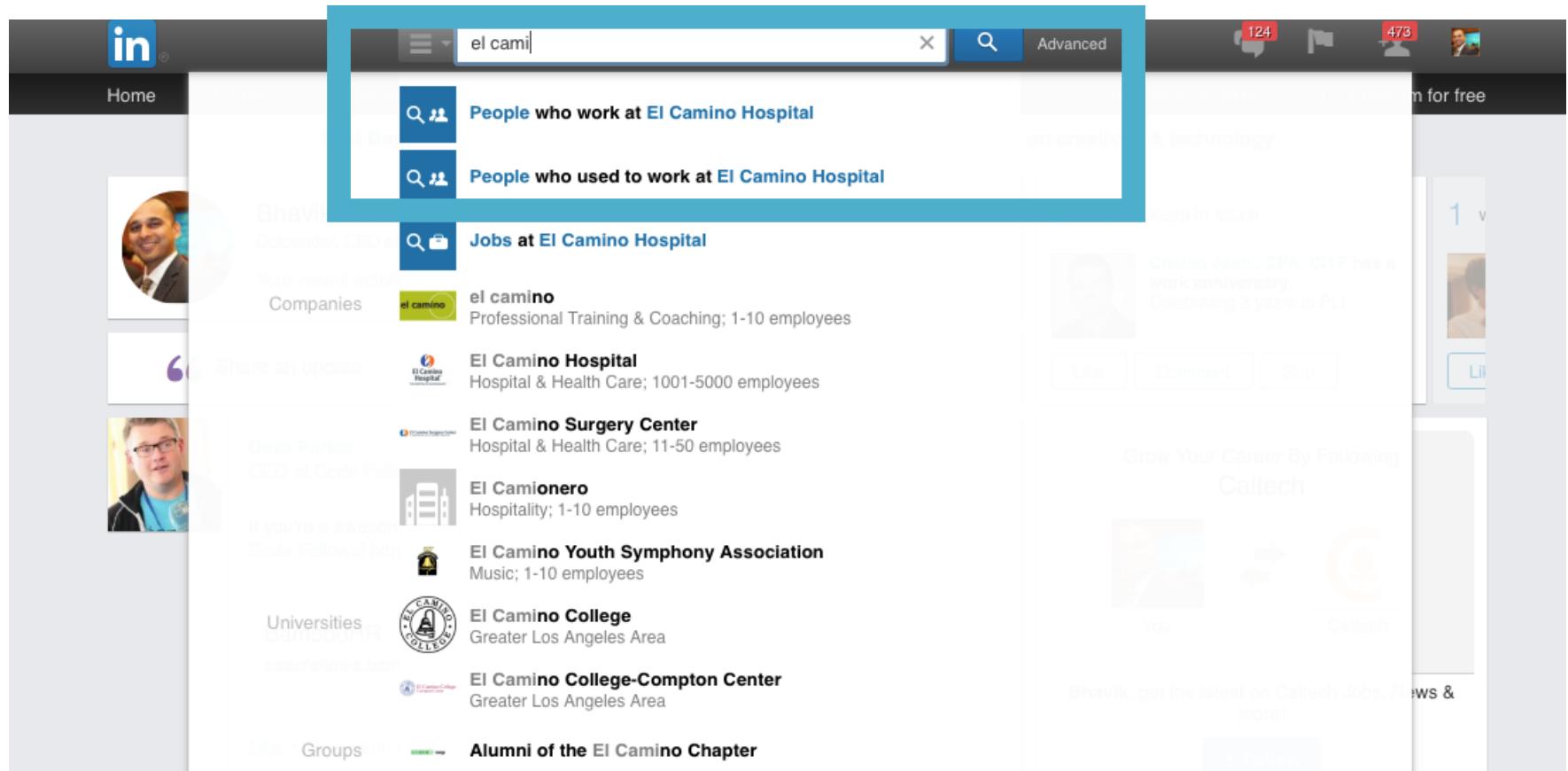
**Aravind Chandramouli** Data Scientist at Fidelity Investments

[Suresan Krishnamoorthy](#)

# Contact Information

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# Searching By Company Name



The screenshot shows a LinkedIn search interface with the query "el cami" entered into the search bar. A blue box highlights the search results section. The results include:

- People who work at El Camino Hospital
- People who used to work at El Camino Hospital
- Jobs at El Camino Hospital
- el camino Professional Training & Coaching; 1-10 employees
- El Camino Hospital Hospital & Health Care; 1001-5000 employees
- El Camino Surgery Center Hospital & Health Care; 11-50 employees
- El Camionero Hospitality; 1-10 employees
- El Camino Youth Symphony Association Music; 1-10 employees
- El Camino College Greater Los Angeles Area
- El Camino College-Compton Center Greater Los Angeles Area
- Alumni of the El Camino Chapter

# Searching By Company Name

LinkedIn search results for "el camino hospital".

Search filters applied:

- Relationship: 1st Connections (checked)
- Location: San Francisco Bay Area (checked)
- Current Company: El Camino Hospital (checked)

Results:

- Daphne Luong: VP, Engineering, San Francisco Bay Area • Computer Software  
55 shared connections • Similar

Ads:

- \$1995 Web Design with SEO: High-End Agency At A Low-End Price. Get So Much For A Few Hundred More!
- MIT EMBA Info Event 11/17: Meet the Admissions team in San Fran. Signup online. Mid-career, Part-time.

Right sidebar:

- Find the right person faster**
- Focus your search with powerful Premium filters like:
  - Seniority level
  - Job function
  - Company size
- Try Premium**
- PREMIUM
- Pay your way across the world by hosting on Airbnb.

# Twitter

- Direct communication line to active users
- Contact / Personal Blog Link

# Twitter Profile

Home Notifications Moments Messages

You'll never reach it"  
-Salvador Dali



TWEETS 17.8K FOLLOWING 1,720 FOLLOWERS 2,533 FAVORITES 3,518 LISTS 21

Follow

**Rehana Rehman** @msrehreh

Social Media Specialist #Cisco & @CiscoEVN | Digital Marketing 24/7 | #STEM & #WomenInTech advocate | Wife & Mom of 3 | Soccer fangirl | All my tweets.

📍 Silicon Valley, CA  
🔗 everybodylovesreh.blogspot.com  
🕒 Joined May 2009  
👶 Born on December 17

**Tweets** Tweets & replies Photos & videos

**Rehana Rehman** @msrehreh · 4h

Mentor Monday in full force: Read @Cisco's @LizCentoni's interview | via @Light\_Reading lightreading.com/business-emplo...

📍 Cisco WISE, Cisco and Elizabeth



Who to follow · Refresh · View all

**Chris Wanstrath** @defunkt Follow

**GitHub Status** @githubstatus Follow

**Milstein@** @milson Followed by Venture Colleg... Follow

Find friends

San Francisco Trends · Change  
#NationalPumpkinDav

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# Twitter Profile

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Rehana Rehman

Social Media Specialist #Cisco & @CiscoEVN | Digital Marketing 24/7 | #STEM & #WomenInTech advocate | Wife & Mom of 3 | Soccer fangirl | All my tweets.

📍 Silicon Valley, CA  
🔗 everybodylovesreh.blogspot.com  
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👶 Born on December 17

[Tweet to Rehana Rehman](#)

**Tweets** [Tweets & replies](#) [Photos & videos](#)

Rehana Rehman @msrehreh · 4h Mentor Monday in full force! Read @Cisco's @LizCervantes interview | via [Read more](#) Read more about reading comprehension skills in the workplace...  
at Cisco WISE, Cisco and Elizabeth

Who to follow · Refresh · View all

Chris Wanstrath @defunkt Follow

Cathie States @cathie.states Follow

Milson @milson Followed by Venture Colleg... Follow

Find friends

San Francisco Trends · Change  
#NationalPumpkinDay

# Twitter Profile



The Twitter profile for Rehana Rehman includes the following statistics:

- TWEETS 17.8K
- FOLLOWING 1,720
- FOLLOWERS 2,533
- FAVORITES 3,518
- LISTS 21

Below the stats, there are tabs for Tweets, Tweets & replies, and Photos & videos. A yellow arrow points from the text "Personal Blog" to the "Tweets" tab.

**Rehana Rehman**

Social Media Specialist @Cisco & @CiscoEVN | Digital Marketing 24/7 | #STEM & #WomenInTech advocate | Wife & Mom of 3 | Soccer fangirl | All my tweets.

📍 Silicon Valley, CA  
🔗 everybodylovesreh.blogspot.com  
🕒 Joined May 2009  
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**Personal Blog**  
Most personal blogs have contact page

**Who to follow**

- Chris Wanstrath @defunkt
- Github Status @githubstatus
- Milstein@ @milson

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Home Notifications Moments Messages

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[Tweet to Rehana Rehman](#)

Who to follow · Refresh · View all

- Chris Wanstrath @defunkt [Follow](#)
- GitHub Status @githubstatus [Follow](#)
- Milstein@ @milson Followed by Venture Colleg... [Follow](#)

Find friends

Francisco Trenas · Chanc...  
#NationalPumpkinDay

**Tweet this contact**

# Facebook

- Some of the most active groups on social media
- Direct Messaging allows you to contact any Facebook user

# Facebook Group

The screenshot shows a Facebook group page for "Social Media Managers". The group is a closed group with 9,051 members. The page features a banner for "Social Media Managers Group" with the tagline "Where Social Media Professionals Connect & Share". It includes a sponsored post from "SocialMediaManagerPro.com". The main interface includes tabs for Discussion, Members, Events, Photos, and Files. A central text area encourages users to list their Twitter accounts. A note at the bottom asks users to edit the document instead of commenting. The right sidebar displays member profiles and a "Create New Groups" section.

Social Media Managers

Nic Baughman | Edit Profile

Social Media Managers Group

Where Social Media Professionals Connect & Share

Sponsored by: SocialMediaManagerPro.com

Social Media Managers  
Closed Group

Joined | Share | Notifications | ...

Discussion Members Events Photos Files

Write Post Add Photo / Video Ask Question Add File

Write something...

RECENT ACTIVITY

T.s. Elliott edited a doc. January 15

Twitter List

Please feel free to list your Twitter accounts here. If you find any dead accounts, please list in the comments.

\*\*\*PLEASE EDIT THE DOCUMENT. DO NOT LIST YOUR PROFILE IN THE COMMENTS, THEY WILL BE DELETED. EVERYONE IN THE GROUP HAS EDIT PRIVILEGES. THANK YOU!!!\*\*

... See More

MEMBERS 9,051 Members (64 new)

+ Add People to Group

Invite by Email

DESCRIPTION Welcome!

See More

CREATE NEW GROUPS

Groups make it easier than ever to share with friends, family and teammates.

Create Group

# Facebook Group

The screenshot shows a Facebook group page for "Social Media Managers". The group is a closed group with 9,051 members. A large red overlay text "Thousands of Individuals to contact" is placed over the middle of the page. The page features a banner for "SocialMedia Managers Group" with the tagline "Where Social Media Professionals Connect & Share". It includes sections for discussions, members, events, photos, and files. A recent activity post by T.s. Elliott is visible, along with a "Twitter List" section and a note about editing the document. A modal window is open, showing member profiles and a "Create Group" button.

Social Media Managers

Closed Group

Sponsored by: SocialMediaManagerPro.com

Social Media Managers

Discussion Members Events Photos Files

Write Post Add Photo / Video Ask Question Add File

Write something...

RECENT ACTIVITY

T.s. Elliott edited a doc. January 15

Twitter List

Please feel free to list your Twitter accounts here. If you find any dead accounts, please list in the comments.

\*\*\*PLEASE EDIT THE DOCUMENT. DO NOT LIST YOUR PROFILE IN THE COMMENTS, THEY WILL BE DELETED. EVERYONE IN THE GROUP HAS EDIT PRIVILEGES. THANK YOU!!!\*\*\*

MEMBERS 9,051 Members (64 new)

invite by Email

DESCRIPTION Welcome!

CREATE NEW GROUPS

Create Group

Thousands of Individuals to contact

# Google It

- Use keywords from customer segment e.g.: “VP of Sales”
- Use google to find news articles relevant to your field
- Search for blog posts and conferences

# Conferences

- The quickest way to get rich customer interactions (quantity and quality)
- During your customer interviews, ask the interviewee which conferences they attend/blogs they subscribe. This is how you get the list of conferences to target.
- Manage your time wisely. Prepare by reviewing the attendee list.
- With speakers who are short on time, goal is to get their business card and find out the best way to schedule time on their calendar.
- Find out about competitive solutions/sponsors etc.
- Lunches, Coffee Breaks and Cocktail receptions are fantastic opportunities to connect

# Conferences

SALES HACKER

Why Attend Who Attends Speakers Sponsors Agenda REGISTER TODAY

## Find out who is speaking

WHO'S SPEAKING?



**JILL ROWLEY**  
Social Selling Evangelist  
#SocialSelling



**KEN KROGUE**  
Founder, President, and CSO  
InsideSales.com



**KOKA SEXTON**  
Content & Social Marketing  
LinkedIn



**BILL BINCH**  
SVP Global SMB Sales  
Marketo



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# Competitors

- Research competitors' websites and find their customer names from testimonials etc.
- Review news stories to find their current customer base
- Contact your competitors customers for interviews

# Competitors

**AETHON**

TUG ROBOT MEDEX TRACKING ABOUT NEWS & EVENTS TEAM BLOG

**Contact Us**

**TUG** TUGs have traveled over **1,000,000 miles**. They make **50,000 deliveries per week**. Real ROI through productivity plus tangible benefits to patient care and worker safety.

**Improved Patient Experience**

Staff can spend more time with patients or assist nursing instead of transporting goods through the hospital.

More time with the patient translates to better care and improved patient satisfaction scores.



**Benefits** 

**How it Works** 

**Command Center** 

**Watch TUG in Action** 

24/7 Improved Productivity	Improved Patient Experience	Worker Safety & Employee Satisfaction	Patient Safety	Enhances the High-Tech Hospital
----------------------------	-----------------------------	---------------------------------------	----------------	---------------------------------

# Competitors

## Look at their news



TUG | OBC | MEDICAL MARKETING | ABOUT

Contact Us

NEWS & EVENTS

TEAM

BLOG



TUGs have traveled over 1,000,000 miles. They make 50,000 deliveries per week.  
Real ROI through productivity plus tangible benefits to patient care and worker safety.

### Improved Patient Experience

Staff can spend more time with patients or assist nursing instead of transporting goods through the hospital.

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Benefits



How it Works



Command Center



Watch TUG in Action



24/7 Improved Productivity

Improved Patient Experience

Worker Safety & Employee Satisfaction

Patient Safety

Enhances the High-Tech Hospital

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# Competitors



## Automate Medication Tray Replenishment Using MedEx TraySafe™

Aug 7, 2015

By:admin

Categories: [News](#)

PITTSBURGH—(BUSINESS WIRE)—Aethon is pleased to announce LeeSar in Fort Myers, Florida has selected Aethon's MedEx TraySafe™ product to streamline their medication tray and kit processing for improving safety and compliance of preconfigured trays used in crash carts. LeeSar provides supply chain and operational services to multiple hospitals in the region.

[Read More](#)



## Aethon Recognized as Most Promising Robotic Solution Provider for 2015

Jun 30, 2015

By:admin

Categories: [News](#)

CIOReview recognized Aethon and its TUG robot as one of 20 most promising robotics solutions for 2015.

[Read More](#)



## Aethon to Introduce Next-Generation Tray and Kit Management Solution at ASHP Summer Meetings

Jun 4, 2015

By:admin

Categories: [Blog](#), [News](#), [Pharmacy](#)

Aethon to Introduce TraySafe Next-Generation Automated Kit Replenishment and Location Solution at ASHP. Ultra high resolution imaging detects

News  
Events

### Previous Posts

[Aethon Wins Major Contract with LeeSar to Automate Medication Tray Replenishment Using MedEx TraySafe™](#)

[Aethon Recognized as Most Promising Robotic Solution Provider for 2015](#)

[Aethon to Introduce Next-Generation Tray and Kit Management Solution at ASHP Summer Meetings](#)

[Aethon to Unveil Next-Generation Kit and Tray Management at ASHP June 7-9 – Booth #539](#)

[TUG Highlighted in Becker's Hospital Review](#)

Aethon highlighted in branding magazine, "Contagion"

[TUG Robots at UCSF featured on CNet](#)

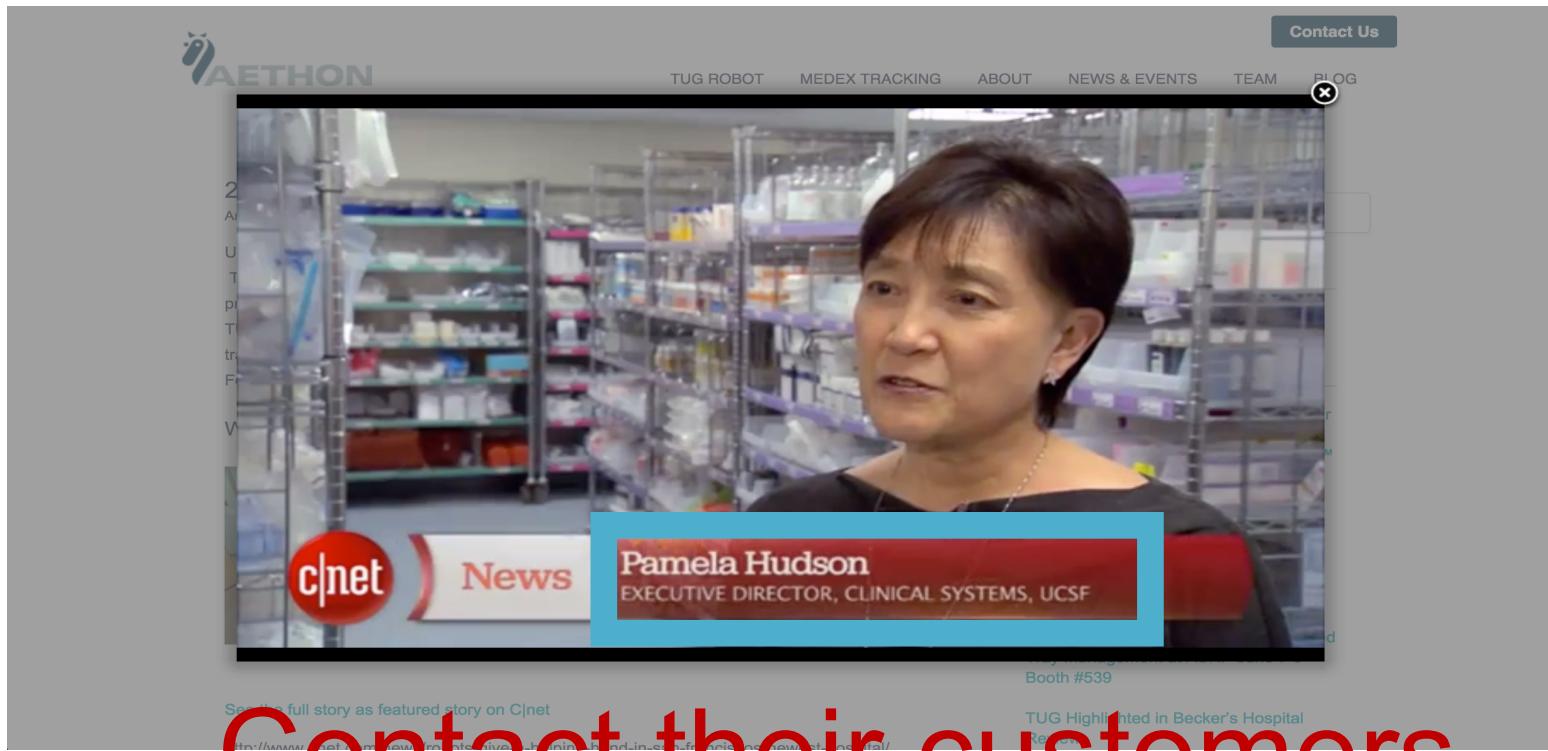
[CNBC covers Aethon's TUG autonomous mobile robot](#)

[Aethon's TUG featured on PBS](#)

# Find relevant posts

BerkeleyHaas

# Competitors: Testimonial Videos



Contact their customers

# Sample Content for Email / Cold Call

- Dear XYZ,
- Our team of [students / researchers] is researching / studying solutions for relieving hospital staff of tedious and back breaking tasks using robotics so people can focus on providing high quality care for patients.
- We are trying to deeply understand the pain points for the different stakeholders in this ecosystem. Your domain expertise and 10+ years of experience as the <insert job title> Head of Hospital Operations would give us the insights we are seeking.
- When is a good day/time for you over the next two weeks to meet with my team for a short 10-15 minute in-person meeting.

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**Tips for Setting up Customer  
Interviews**