

Title: Customer Insights

**A Mediumroast, Inc. study report enabling attributable market insights.**

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Creation Date: **2021-10-25 02:37**

Findings

# Introduction

This Customer Insights study includes two phases separated by 5 years. The first phase was performed as as a part of a 2014 research project that emphasized A/B testing for a customer study indexing application. While the second phase, conducted in late 2019, both uncovered new themes and validated key ideas surfaced in the first phase. In the second phase the emphasis was to investigate a single competitor/partner candidate, Aha!, to to determine if the key themes, detected within the first phase, had or had not been already addressed. While details are accounted for in the Opportunities section, the conclusion is that the themes still largely remain unsolved by companies who build tools for product management, project management, and program management disciplines. Further, research continues to test both the user experience and refine elements of these key themes with product managers at companies like Ring Central, Google, Chaos Search, and so on.

# Opportunity

Overall the two phases of the study were well paired. Essentially both the first and second phases illustrated that product managers need tooling that enable them to discern the whys behind an effort leadning to a distillation of whats needed to build an offer. Thus there is an opportunity to build a product enabling product managers (and potentially customer success managers) to reveal insights from interactions with users, partners and competitors powering efforts ranging from from product modernization to new product introduction. Further, competitive insights surfaced in the second phase related to Aha!. These insights showed that Aha! has yet to tackle features that automatically and systematically use interactions to reveal the whys and whats behind product roadmaps. (Note that Aha! is highly relevant to sense competitive intelligence because they are the leader in market category of Product Management and Roadmapping tooling.) While these two phases paired well, a weakness was obvious when the two phases were combined: An intersection between them did not clearly surface. Therefore a third phase was performed to validate and look for clear couplings between the first two phases. What follows are some of the key opportunities discovered through these three phases followed by discrete sections relating systematically uncovered key themes, snippets associated to key themes, and finally abstracts for related interactions.

* Formalize Product Relationship Management - Tooling and associated process is needed to enable the build out of the community around the product management team.
* Outlive the Product Manager across the entire lifecycle - Product managers are not always present throughout an entire program lifecycle or may leave the company making it essential that source materials and decisioning reasoning stands alone.
* Integrate critical stakeholders via tooling - Product Managers are a key part of an overall program, but they do no live on an island making tooling access for a diverse set of stakeholders required.
* Reduce the time and effort of product research and feedback correlation - Discerning the core whys and whats of any offer is super critical, but the path to get there is often slow and intransparent. Therefore, tooling should drive speed, improve transparency and reduce work burden.
* Forward and backward Traceability from problem to solution - While modern product management and roadmapping tooling facilitates process transparency, getting to clear and key whys and whats is frequently opaque and untraceable. Clearly, revealing the path from problem identication, the whys, to problem resolution, the whats, is a key opportunity for tooling.
* Intelligent Information Integration by connecting Productivity, CRM, Support, PM tools - New tooling cannot exist in an island therefore any opportunity requires integration into a user/customer ecosystem.
* Visibility and Reporting for relevant stakeholders by themes, products and customers - Beyond kicking off work with engineering many stakeholders want to understand how whys, encoded in key themes, are being resolved. For example customer success managers will need to know how their customers have affected the roadmap, customers themselves would like to understand their level of influence, and marketing teams will want to map features to key user pain points. This means an offer should enable all interested stakeholders to ask and answer key questions beyond the what is needed to drive a roadmap.
* PRFAQ - In the third round of interviews it has become obvious that the output format should look more like an Amazon PR-FAQ which stands for Press Release and Frequently Asked Questions. Therefore as we progress towards MVP it will be required to change the report format to PR-FAQ.

# Actions

To improve completeness of this study the following actions and next steps are documented with appropriate statuses.

1. Synthesize the 2014 and 2019 interactions into a single study, analyze and uncover any weaknesses. | Status: Done
2. Perform interviews, document these as interactions and ingest into the mediumroast.io to help remedy the weaknesses of previous interactions. | Status: In process
3. Model and manage this Customer Insights study in the mediumroast.io | Status: In process
4. Revamp the user experiences and associated backend to follow the new findings. | Status: In process

References

## 201912151800-Customer Insights-Aha

Date: 2019-12-15 18:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! At the same time, extra time is spent to analyze the recording to identify and record these very moments. I have several follow-up questions: What do you mean by "bad" features? Immediately after interview, capture any key moments on a spreadsheet 3. Share with team via Slack or feature card 4. Share the complete spreadsheet that highlights all insights to the team aga...

Interaction Resource: [201912151800-Customer Insights-Aha](http://mr-02:9000/interactions/201912151800-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912151900-Customer Insights-Aha

Date: 2019-12-15 19:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! In this case, you can have a long form question with multiple followup interview since the customer understands you are trying to get them a better product/service. Only then I would contact the customer and ask for an interview. ( Do you have a business case template to capture the feature + ROI?...

Interaction Resource: [201912151900-Customer Insights-Aha](http://mr-02:9000/interactions/201912151900-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912152000-Customer Insights-Aha

Date: 2019-12-15 20:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! In particular, taking notes on the key points and sharing them with the team. If it's in person then I have to take notes right after the interview because doing this during the process really spoils communication and make the other person/people uncomfortable. s. we can get in touch in Telegram, FBMessenger, WhatsApp or any other messenger for further discussion You Mi...

Interaction Resource: [201912152000-Customer Insights-Aha](http://mr-02:9000/interactions/201912152000-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912161800-Customer Insights-Aha

Date: 2019-12-16 18:00 | Study Iteration: 1

You Might Also Like Topics What process do you use to Careers prioritize product features required Collaboration from multiple stakeholders? What I ﬁnd helpful is to have a single backlog tool (either Jira or Trello or some other similar tool, but preferably not more than one) which contains backlog items that act as reminders. As those backlog items get close to getting ready, you'll want to describe them in a bit more detail. You may do some of that in the tool itself (description or comment) ...

Interaction Resource: [201912161800-Customer Insights-Aha](http://mr-02:9000/interactions/201912161800-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912161900-Customer Insights-Aha

Date: 2019-12-16 19:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! Justin Williams Mischief & Mayhem 2 years ago Many orgs still confuse it with market research and you will probably be ﬁghting against this your entire career. Most orgs would be better off completely discarding them. Steve Johnson author, speaker, consultant. Most product managers will use a combination of observation, interviews, and surveys to get the relevant inform...

Interaction Resource: [201912161900-Customer Insights-Aha](http://mr-02:9000/interactions/201912161900-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912162000-Customer Insights-Aha

Date: 2019-12-16 20:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! For a product manager, research serves to validate the assumptions in a business case, such as each of the topic areas in Ash Maurya's canvas. The numbers show the order from most critical (#1: customer segment or person) to least critical (#9: cost structure)....

Interaction Resource: [201912162000-Customer Insights-Aha](http://mr-02:9000/interactions/201912162000-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912171800-Customer Insights-Aha

Date: 2019-12-17 18:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! So the product has been launched and now we have to discover who are real users will be. Comment Like Comment Like 2 John Eaton Client Strategist at Macomb-OU Incubator 2 years ago As a long time PM now in a consulting role for start-ups & entrepreneurs, I'd say the focus ought to be on end-user/customer discovery and persona development. Comment Like 1 Keith Brown VP ...

Interaction Resource: [201912171800-Customer Insights-Aha](http://mr-02:9000/interactions/201912171800-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912171900-Customer Insights-Aha

Date: 2019-12-17 19:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! Qualitative research requires you to pull out themes from comments or descriptions. But only if you already know the question you are trying to answer. Often times folks look at qualitative data as anecdotal, which it certainly can be if the research is done poorly (i.e. using poor methodology). But I may conduct a survey that asks a question like "How well did this fea...

Interaction Resource: [201912171900-Customer Insights-Aha](http://mr-02:9000/interactions/201912171900-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912172000-Customer Insights-Aha

Date: 2019-12-17 20:00 | Study Iteration: 1

Topics You Might Also Like Careers Collaboration Should product managers use the Ideas same tools as development teams? Steve Johnson author, speaker, consultant. Having a deﬁned objective before you get started will help you know which tool can help or which method to use. I got so annoyed with Survey Monkey and Qualtrics that I started building my own software to help me get more, high quality user responses with stratiﬁcation based on demographics. thanks, Kartik Comment Like 1 Participation...

Interaction Resource: [201912172000-Customer Insights-Aha](http://mr-02:9000/interactions/201912172000-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912181800-Customer Insights-Aha

Date: 2019-12-18 18:00 | Study Iteration: 1

Topics You Might Also Like Careers Collaboration General Assembly vs. Product Ideas School: Which course is better and Launches why? Author, speaker, consultant, guitar player. I'm not a sales person and I'm not selling anything. Questions for product management: What are the key features that you liked? You can learn a lot from a client in a face-to-face meeting but I've found that win/loss interviews are more effective on the phone. I would also add another 'section' if you will: Sales. I wrot...

Interaction Resource: [201912181800-Customer Insights-Aha](http://mr-02:9000/interactions/201912181800-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912181900-Customer Insights-Aha

Date: 2019-12-18 19:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! BTW, sales people have the worst ideas for products. Also, it's important to align any new product idea with your product strategy. But it is better to put some structure around it and I have some ideas to share. Tony Fadell (from Apple) says that: “The ﬁrst secret of design is to notice.” The kind of passion that is unrelenting, focused and purposeful. Abraham Maslow D...

Interaction Resource: [201912181900-Customer Insights-Aha](http://mr-02:9000/interactions/201912181900-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912182000-Customer Insights-Aha

Date: 2019-12-18 20:00 | Study Iteration: 1

Topics You Might Also Like Careers Collaboration What is on your End Of Life Ideas checklist? The ﬁrst thing you need to do is get everyone on the same page about what you are trying to do. Speciﬁcally we are looking for - would they choose to use it (value), can they use it (usability), and can we actually build it (feasibility). How would you validate an idea that is more back-end and doesn't translate easily into user interface? So they did a Live Data Prototype in production. A "customer's" ...

Interaction Resource: [201912182000-Customer Insights-Aha](http://mr-02:9000/interactions/201912182000-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912191800-Customer Insights-Aha

Date: 2019-12-19 18:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! Now, create and implement an action plan. So I implemented a format process that began with product management. The developers were thrilled—and suddenly they were shipping like clockwork. The number of times I assumed the reins of products that had no planning documents, poorly deﬁned scope, and no real artifacts, leads me to believe that it is the standard practice. G...

Interaction Resource: [201912191800-Customer Insights-Aha](http://mr-02:9000/interactions/201912191800-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912191900-Customer Insights-Aha

Date: 2019-12-19 19:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! 2 years ago How widespread is the problem? A survey is a good quantitative tool for measuring interest. Begin with qualitative research; measure with quantitative. Perhaps the best technique is to begin marketing the product as if it's already available. Eventually you'll want a web site for deﬁning alerts and an app to receive them but only when the manual process can'...

Interaction Resource: [201912191900-Customer Insights-Aha](http://mr-02:9000/interactions/201912191900-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912192000-Customer Insights-Aha

Date: 2019-12-19 20:00 | Study Iteration: 1

Topics You Might Also Like Careers Collaboration What methods or frameworks do Ideas you use to prioritize features? Question: Should the discovery phase be run as an agile process? Marie Lead Product Manager at Cengage ANZ 11 months ago Thanks Kevin. Though in a big company with lots of stakholders it's more difﬁcult than in a cosy startup. Comment Like 1 Donovan B. 10 months ago In my opinion agile methodology is too "time dependent" for the discovery phase as the discovery phase is more abou...

Interaction Resource: [201912192000-Customer Insights-Aha](http://mr-02:9000/interactions/201912192000-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912201800-Customer Insights-Aha

Date: 2019-12-20 18:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! 3 years ago Hiring a product manager is hard. But there are speciﬁc things you can look for during the interview process to help predict future success. I have seen ﬁrsthand the skills you need to look for when hiring a product manager. As the product lead, it's is their job to communicate vision and strategy. Comment Like 44 Roger L. Cauvin Director of Products 3 year...

Interaction Resource: [201912201800-Customer Insights-Aha](http://mr-02:9000/interactions/201912201800-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912201900-Customer Insights-Aha

Date: 2019-12-20 19:00 | Study Iteration: 1

Topics You Might Also Like Careers Collaboration What is the best walk-through Ideas software to onboard new users? Research What tools do you use for product Roadmaps management? Customer Feedback: ZenDesk as well as emails, phone calls and user interviews. You can see the blog post here: https://blog.aha.io/enhanced-aha-for-marketing-integration-with-google-analytics So, for the product marketing folks viewing this thread....If you are already using Aha!...

Interaction Resource: [201912201900-Customer Insights-Aha](http://mr-02:9000/interactions/201912201900-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912202000-Customer Insights-Aha

Date: 2019-12-20 20:00 | Study Iteration: 1

Topics You Might Also Like Careers Collaboration What is your favorite quote about Ideas product management? Strategy How do you manage ideas and Tools suggestions? the world's #1 product roadmap and marketing planning software 3 years ago Product improvements keep your team energized and your customers happy. Some of my best ideas have come from taking past feature explorations that were cut and reimagining how they could be used to solve new problems....

Interaction Resource: [201912202000-Customer Insights-Aha](http://mr-02:9000/interactions/201912202000-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912211800-Customer Insights-Aha

Date: 2019-12-21 18:00 | Study Iteration: 1

Topics You Might Also Like Careers Collaboration Which wireframe or prototyping Ideas tool do you use and why do you Launches prefer it? The second biggest mistake you can make is not talking to your customers." Searched a bit but couldn't ﬁnd a single place that describes all The Wizard of Oz, The Fake Door, The Landing Justin Williams Mischief & Mayhem 2 years ago Comment Like Drop me an email: jwillia53@gmail.com and I can describe to you my understanding to them! :) If they believe in your ...

Interaction Resource: [201912211800-Customer Insights-Aha](http://mr-02:9000/interactions/201912211800-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912211900-Customer Insights-Aha

Date: 2019-12-21 19:00 | Study Iteration: 1

Topics You Might Also Like Careers Collaboration What methods or frameworks do Ideas you use to prioritize features? Jira Salesforce Slack Trello User experience Search or ask a question Ask a question Log in Question asked by Marta Jurasik Methodologies 8 replies about a year ago Can you describe your approach to solving a customer's problem? If not, iterate or shelve it and move onto the next idea. The ﬁrst thing you need to do is get everyone on the same page about what you are trying to do. ...

Interaction Resource: [201912211900-Customer Insights-Aha](http://mr-02:9000/interactions/201912211900-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912212000-Customer Insights-Aha

Date: 2019-12-21 20:00 | Study Iteration: 1

Topics You Might Also Like Careers Collaboration Do you have a business case Ideas template to capture the feature + Launches ROI? I'm now interested in following up to get a sense of how common these problems are within the market in order to build the business case for it. If you've done a good job of deﬁning the persona and the problem, you can probably assume that most who ﬁt your persona proﬁle have the problem. You're not trying to sell the solution; you're just trying to size it. Perhaps ...

Interaction Resource: [201912212000-Customer Insights-Aha](http://mr-02:9000/interactions/201912212000-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 201912212100-Customer Insights-Aha

Date: 2019-12-21 21:00 | Study Iteration: 1

Topics Careers Collaboration Ideas Launches Marketing Methodologies Releases Requirements Research Roadmaps Strategy Tools Aha! I am NOT asking about any of the following topics (which are already covered in great detail): agile, prioritization, etc. Another resource that may help is Intercom's podcast. They interview product leaders from all sorts of companies so there's a variety of perspectives.. I bet some of the episodes in the archives would directly answer the questions you've listed. So,...

Interaction Resource: [201912212100-Customer Insights-Aha](http://mr-02:9000/interactions/201912212100-AMER-US-CA-SAN DIEGO-ICT-Customer Insights-Aha-Online.pdf)

## 202107091400-Customer Insights-VMware

Date: 2021-07-09 14:00 | Study Iteration: 2

Title: Mediumroast, Inc. Phase 2 Interviews Intention: Answer key questions about PM tooling, buyer personas and overall concept Attendees 1. For VMware everything lives in Jira and Confluence b. The startup that I work for uses Pivotal Tracker c. For document management and information sharing they use Confluence Findings 1. As a marketeer Andrew would advocate for the acquisition of the tool. When I was at a startup with Dina, I could easily ask her to try a tool and she’d whip out her ...

Interaction Resource: [202107091400-Customer Insights-VMware](http://mr-02:9000/interactions/202107091400-AMER-US-California-Campbell-ICT-Customer Insights-VMware-Interview.pdf)

## 202107231300-Customer Insights-Hitachi

Date: 2021-07-23 13:00 | Study Iteration: 2

Title: Mediumroast, Inc. Phase 2 Interviews Intention: Answer key questions about PM tooling, buyer personas and overall concept Attendees 1. You need the right process and a “stick to it” approach. 2.6-months down the road if you don’t pay attention to the process things will fall apart 4.3.How to manage an installed base with lots of basic requirements and tech debt 5.1.I can do that but I need to make sure that this matches and integrates to my other 5.2.In the SaaS world I have that ca...

Interaction Resource: [202107231300-Customer Insights-Hitachi](http://mr-02:9000/interactions/202107231300-AMER-US-California-San Diego-ICT-Customer Insights-Hitachi-Interview.pdf)

## 202107281900-Customer Insights-Google

Date: 2021-07-28 19:00 | Study Iteration: 2

Title: Interview with Stephen Chung – Customer Insights Inten\*on: To determine whether there is a need for Medium Roast oﬀerings by interviewing Product Managers and individuals with similar or related roles in the Informa@on Technology industry. I own, uh, my work on the Google Analy@cs product team. 00:00:13 LDR 00:00:16 SC 00:00:20 SC OK. I haven't gone through an oﬃcial process of like hey Steven, you own this product. What are all the products that are lined up for development? 00:03...

Interaction Resource: [202107281900-Customer Insights-Google](http://mr-02:9000/interactions/202107281900-AMER-US-California-San Francisco-ICT-Customer Insights-Google-Interview.pdf)

## 202107301345-Customer Insights-Microsoft

Date: 2021-07-30 13:45 | Study Iteration: 2

Audio ﬁle 1\_1 Bryce\_Leo-20210730\_134557-Mee3ng Recording.mp4 Did you see the recording going? OK, cool, I don't know why it's not leRng. So OK, basically you said that you believe that you guys are building what price what, what the team believes they need to be building. So we have these conversa3ons and I don't think they truly know how to ar3culate what's going on or what they're feeling, or thinking or what their problems are, and it's diﬃcult for me to help them. I would say the numb...

Interaction Resource: [202107301345-Customer Insights-Microsoft](http://mr-02:9000/interactions/202107301345-AMER-US-Washington-Seattle-ICT-Customer Insights-Microsoft-Interview.pdf)

## 202108031722-Customer Insights-Amazon

Date: 2021-08-03 17:22 | Study Iteration: 2

So Ivan Within Amazon What products Services you and manage. Audio ﬁle Output.mp4 Transcript ¿OK? Costa mar en compe==vo insights hoy será un líder. Muy fans, me Company ciudad de cancha, los what is not barbaridad en 1000, Basic Death in a will, the default things de rounds for a Noguer insights on speciﬁc Business Intelligence and the just eat you with regula=ons that nothing you and that you. Para checar divine The Walking Dead Suppor=ng. Aunque irá del campo más votada, la que se ...

Interaction Resource: [202108031722-Customer Insights-Amazon](http://mr-02:9000/interactions/202108031722-AMER-US-Washington-Seattle-ICT-Customer Insights-Amazon-Interview.pdf)

## 202108041019-Customer Insights-Providence Health and Services

Date: 2021-08-04 10:19 | Study Iteration: 2

Audio ﬁle 1\_1 Mark\_Leonardo-20210804\_101907-Mee4ng Recording.mp4 This is Mark that I would like to understand is UM within. Capture like customer insights or compe44ve insights to make sure that what you're doing from an infrastructure perspec4ve. So like our applica4on, teams are very diﬀerent than what you know. The applica4on teams here at at Providence. Understand it, understand that third party applica4ons they deal with the vendors and and you know try to, you know, encourage them to s...

Interaction Resource: [202108041019-Customer Insights-Providence Health and Services](http://mr-02:9000/interactions/202108041019-AMER-US-Washington-Seattle-Health Care-Customer Insights-Providence Health and Services-Interview.pdf)

## 202108051509-Customer Insights-eBay

Date: 2021-08-05 15:09 | Study Iteration: 2

Audio ﬁle 1\_1 Gopi\_Leonardo-20210805\_150931-Mee6ng Recording.mp4 It says it is recording the word. Basically helping their customers understand the like. You immediately stop it or events are gecng dropped. Or based on like what they comment or how they reach out to us saying hey, I need this help on that. Because we want to make sure that user is not trying to ﬁgure out how to make it work right. That's where the computer analysis comes, and I have seen in the past where the POC on the buyer ...

Interaction Resource: [202108051509-Customer Insights-eBay](http://mr-02:9000/interactions/202108051509-AMER-US-Washington-Redmond-ICT-Customer Insights-eBay-Interview.pdf)

## 202108091407-Customer Insights-JP Morgan Chase

Date: 2021-08-09 14:07 | Study Iteration: 2

Audio ﬁle 1\_1 Manasa \_ Leo-20210809\_140725-Mee3ng Recording.mp4 So the ques3ons are preDy preDy straighForward, no worries. JP Morgan Chase and Co. This is called. You have customer input and I'm trying to understand what is the process that you guys follow to set up your priori3es based on those diﬀerent inputs, right? Yeah, few aspects here Leo uh, you know some something and you know me and my en3re PM team is working at right now is there are three to four folds right now from when I...

Interaction Resource: [202108091407-Customer Insights-JP Morgan Chase](http://mr-02:9000/interactions/202108091407-AMER-US-California-San Francisco-Finance-Customer Insights-JP Morgan Chase-Interview.pdf)

## 202108111451-Customer Insights-Self Employed

Date: 2021-08-11 14:51 | Study Iteration: 2

Audio ﬁle audio\_only.m4a Transcript Wow, there's some new boys that says. So so you were CEO by President, President, director, entry level tester, great Utles. I'm building a game that is going to run on 1980s era hardware. So I'm also going to do a port for the PC, so there'll be a larger audience as well, 'cause that that's kind of a preZy small audience, but so so I think my customer my potenUal customers are actually preZy small, like there's not a whole lot of people that are bu...

Interaction Resource: [202108111451-Customer Insights-Self Employed](http://mr-02:9000/interactions/202108111451-AMER-US-North Carolina-Charlotte-Entertainment-Customer Insights-Self Employed-Interview.pdf)

## 201402240930-Customer Insights-HDS

Date: 2014-02-24 09:30 | Study Iteration: default

I know that Scott N. used to send them out in the past. CONCLUSION: Some sense of summary of the collateral is needed to decrease the mental load in gathering information from the collateral. Every so often in an easy to consume approach social, status reports, resending the materials the best data. Not sure it would be worth the investment. Given all of that I use it to defend where we’re going. Even if I wanted to I could not read/listen to the materials. See 3.a.i and others d. If you d...

Interaction Resource: [201402240930-Customer Insights-HDS](http://mr-02:9000/interactions/201402240930-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201402241004-Customer Insights-HDS

Date: 2014-02-24 10:04 | Study Iteration: default

Um, frankly you catch me quite naked here. I would not wait for someone to read the data themselves. That is a very good way to visualization the information. I think that in the end when we look at it we could really put together customer/market requirements from the beginning. If you do not how do you consolidate your own information to produce release, plan, other content? In my case I don’t think I have a system anymore. e. CONCLUSION: Self organization isn't working either. Secondly I ...

Interaction Resource: [201402241004-Customer Insights-HDS](http://mr-02:9000/interactions/201402241004-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201402250831-Customer Insights-HDS

Date: 2014-02-25 08:31 | Study Iteration: default

I think in the past there have been customer study materials. Maybe we should be visiting the customer once a half and then following up. How would you like to explore the materials to get the best possible beneﬁt? I would like to think that we would have some type of search. I think that ﬂat ﬁles don’t help me very much unless I can have a tool that pulls data out. MS Word is a little more helpful because I can jump to a word by searching. On my phone I could do certain things and then h...

Interaction Resource: [201402250831-Customer Insights-HDS](http://mr-02:9000/interactions/201402250831-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201402250915-Customer Insights-HDS

Date: 2014-02-25 09:15 | Study Iteration: default

Which are done yearly typically and you publish them on theLoop and it was on Sharepoint. If we would have better tools to ﬁnd content in materials like audio ﬁles. Also think about individuals John Mansﬁeld would listen to the AT&T recordings because he would like to know everything about AT&T, but the lower you go there are more topical speciﬁcs. We’ve even used marketing to conduct surveys with TechValidate, so PM is using multiple modes to help engineering and PM answer why we should...

Interaction Resource: [201402250915-Customer Insights-HDS](http://mr-02:9000/interactions/201402250915-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201402270900-Customer Insights-HDS

Date: 2014-02-27 09:00 | Study Iteration: default

I know there are [materials] I do not know where they are located, but assume sharepoint. How would you like to explore the materials to get the best possible beneﬁt? So it is driving what I do with this customer study material. I think it is also important to show not only what the customer is saying, but where it is relevant in our business. When there isn’t anything documented there is no way to reﬂect the actual outcome. We also need to think about how the customer study can be used t...

Interaction Resource: [201402270900-Customer Insights-HDS](http://mr-02:9000/interactions/201402270900-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201402271515-Customer Insights-HDS

Date: 2014-02-27 15:15 | Study Iteration: default

It is sufﬁcient for the detail, but not sufﬁcient for the output summary in a tabulation kind of way. How would you like to explore the materials to get the best possible beneﬁt? Can I easily leverage this for my MRD/PRD to help create the proper requirements. Yes, segments/verticals are very relevant and important in conjunction with keyterms. How do you typically use customer study materials in your i. See previous....

Interaction Resource: [201402271515-Customer Insights-HDS](http://mr-02:9000/interactions/201402271515-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201402281310-Customer Insights-HDS

Date: 2014-02-28 13:10 | Study Iteration: default

Yes and I know that they are on the OTP Sharepoint, but I do have the links on my computer somewhere. CONCLUSION: Has greater awareness of the collateral and immediate understanding of past/previous attempts to summarize with word clouds. Visualizations that I found impactful as of late: Boston Consulting Matrix models are very interesting, but not sure if this might be a proper/possible summary or not. It isn’t always to create something and there isn’t really a predetermined usage. If y...

Interaction Resource: [201402281310-Customer Insights-HDS](http://mr-02:9000/interactions/201402281310-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201403101041-Customer Insights-HDS

Date: 2014-03-10 10:41 | Study Iteration: default

Yes I am aware of different material and mostly receive the collateral via email. I think for projects we were working at that time it was sufﬁcient, but it really hasn’t progressed. CONCLUSION: Aware of the collateral but not a repository to track them identiﬁes the fact that we aren’t keeping a longitudinal view of the customer. I will also need to socialize the outcomes/ﬁndings with those who I touch. As a reference, and that is not always the case with every release. I haven’t every w...

Interaction Resource: [201403101041-Customer Insights-HDS](http://mr-02:9000/interactions/201403101041-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201403110945-Customer Insights-HDS

Date: 2014-03-11 09:45 | Study Iteration: default

Yeah we’ve got a variety of customer study materials on Diamond. I think that they are relatively effective. I think that some of the way the analysts are presenting in terms of histograms are helpful. We were focused on using the data as a form of sentiment analytics in the past when I worked at analyst ﬁrms. I like data that helps me understand what I don’t have in the data set. CONCLUSION: Deﬁnitely a different approach to getting at the collateral and using for other purposes....

Interaction Resource: [201403110945-Customer Insights-HDS](http://mr-02:9000/interactions/201403110945-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201403111306-Customer Insights-HDS

Date: 2014-03-11 13:06 | Study Iteration: default

I know there are case studies and I’m forgetting the name, there’s a girl that manages our case studies. Oh customer studies, those I’ve been with the team and helped to make them in the past. How would you like to explore the materials to get the best possible beneﬁt? What platform is the best target for such an exploration system? Perhaps the data should be pushed to the users that would make it much easier to solve the business problem whereby people don’t have enough time for careful c...

Interaction Resource: [201403111306-Customer Insights-HDS](http://mr-02:9000/interactions/201403111306-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201403121034-Customer Insights-HDS

Date: 2014-03-12 10:34 | Study Iteration: default

B Date: Mar 12, 2014 10:34 PDT Title: Interview notes and questions for determining feature set Questions: 1. In the past we’d record the interviews with customers and transcribe them. At that time it was more speciﬁc to what we were doing and they were done 4-5 years ago. Can we look at customers over time, what is the trend in the customer’s mind over time? The next interview you do is always different from the ﬁrst interview you did. This can help me better bring things to market at th...

Interaction Resource: [201403121034-Customer Insights-HDS](http://mr-02:9000/interactions/201403121034-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201403130801-Customer Insights-HDS

Date: 2014-03-13 08:01 | Study Iteration: default

It is in some cases it represents a basis, but it is never enough. CONCLUSION: Clearly aware of the collateral’s location and states that it is important to do something with the data. We spend more time trying to understand what we don’t need versus what we need and I think it should be the other way around. In some cases where you don’t know how to start the ability to search, summarize and get abstracted summaries would be a good idea. The materials we use are there mostly to create a ...

Interaction Resource: [201403130801-Customer Insights-HDS](http://mr-02:9000/interactions/201403130801-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)

## 201403140702-Customer Insights-HDS

Date: 2014-03-14 07:02 | Study Iteration: default

Yes I know there are customer study materials. I found the summary report kind of interesting. Let’s say that the word cloud is build with scanning the terms in 6 or more customers then that would give me the overall feeling of things. It would be whatever is on the mind of one customer if the sample size was merely one. Generally, the outcome could be a trend, pain point, or an increased awareness of conditions in the market. Let’s say ﬂash we know that Gartner Group has been involved wit...

Interaction Resource: [201403140702-Customer Insights-HDS](http://mr-02:9000/interactions/201403140702-AMER-US-CA-SANTA CLARA-ICT-Customer Insights-HDS-Interview.pdf)