

Title: Customer Insights

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

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# 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.

1. Formalize Product Relationship Management - Tooling and associated process is needed to enable the build out of the community around the product management team.
2. 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.
3. 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.
4. 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.
5. 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.
6. 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.
7. 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.
8. 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