

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. F o r m a l i z e P r o d u c t R e l a t i o n s h i p M a n a g e m e n t - T o o l i n g a n d a s s o c i a t e d p r o c e s s i s n e e d e d t o e n a b l e t h e b u i l d o u t o f t h e c o m m u n i t y a r o u n d t h e p r o d u c t m a n a g e m e n t t e a m .
2. O u t l i v e t h e P r o d u c t M a n a g e r a c r o s s t h e e n t i r e l i f e c y c l e - P r o d u c t m a n a g e r s a r e n o t a l w a y s p r e s e n t t h r o u g h o u t a n e n t i r e p r o g r a m l i f e c y c l e o r m a y l e a v e t h e c o m p a n y m a k i n g i t e s s e n t i a l t h a t s o u r c e m a t e r i a l s a n d d e c i s i o n i n g r e a s o n i n g s t a n d s a l o n e .
3. I n t e g r a t e c r i t i c a l s t a k e h o l d e r s v i a t o o l i n g - P r o d u c t M a n a g e r s a r e a k e y p a r t o f a n o v e r a l l p r o g r a m , b u t t h e y d o n o l i v e o n a n i s l a n d m a k i n g t o o l i n g a c c e s s f o r a d i v e r s e s e t o f s t a k e h o l d e r s r e q u i r e d .
4. R e d u c e t h e t i m e a n d e f f o r t o f p r o d u c t r e s e a r c h a n d f e e d b a c k c o r r e l a t i o n - D i s c e r n i n g t h e c o r e w h y s a n d w h a t s o f a n y o f f e r i s s u p e r c r i t i c a l , b u t t h e p a t h t o g e t t h e r e i s o f t e n s l o w a n d i n t r a n s p a r e n t . T h e r e f o r e , t o o l i n g s h o u l d   
    d r i v e s p e e d , i m p r o v e t r a n s p a r e n c y a n d r e d u c e w o r k b u r d e n .
5. F o r w a r d a n d b a c k w a r d T r a c e a b i l i t y f r o m p r o b l e m t o s o l u t i o n - W h i l e m o d e r n p r o d u c t m a n a g e m e n t a n d r o a d m a p p i n g t o o l i n g f a c i l i t a t e s p r o c e s s t r a n s p a r e n c y , g e t t i n g t o c l e a r a n d k e y w h y s a n d w h a t s i s f r e q u e n t l y o p a q u e a n d   
    u n t r a c e a b l e . C l e a r l y , r e v e a l i n g t h e p a t h f r o m p r o b l e m i d e n t i c a t i o n , t h e w h y s , t o p r o b l e m r e s o l u t i o n , t h e w h a t s , i s a k e y o p p o r t u n i t y f o r t o o l i n g .
6. I n t e l l i g e n t I n f o r m a t i o n I n t e g r a t i o n b y c o n n e c t i n g P r o d u c t i v i t y , C R M , S u p p o r t , P M t o o l s - N e w t o o l i n g c a n n o t e x i s t i n a n i s l a n d t h e r e f o r e a n y o p p o r t u n i t y r e q u i r e s i n t e g r a t i o n i n t o a u s e r / c u s t o m e r e c o s y s t e m .
7. V i s i b i l i t y a n d R e p o r t i n g f o r r e l e v a n t s t a k e h o l d e r s b y t h e m e s , p r o d u c t s a n d c u s t o m e r s - B e y o n d k i c k i n g o f f w o r k w i t h e n g i n e e r i n g m a n y s t a k e h o l d e r s w a n t t o u n d e r s t a n d h o w w h y s , e n c o d e d i n k e y t h e m e s , a r e b e i n g   
    r e s o l v e d . F o r e x a m p l e c u s t o m e r s u c c e s s m a n a g e r s w i l l n e e d t o k n o w h o w t h e i r c u s t o m e r s h a v e a f f e c t e d t h e r o a d m a p , c u s t o m e r s t h e m s e l v e s w o u l d l i k e t o u n d e r s t a n d t h e i r l e v e l o f i n f l u e n c e , a n d   
    m a r k e t i n g t e a m s w i l l w a n t t o m a p f e a t u r e s t o k e y u s e r p a i n p o i n t s . T h i s m e a n s a n o f f e r s h o u l d e n a b l e a l l i n t e r e s t e d s t a k e h o l d e r s t o a s k a n d a n s w e r k e y q u e s t i o n s b e y o n d t h e w h a t i s n e e d e d t o d r i v e a r o a d m a p .
8. P R F A Q - I n t h e t h i r d r o u n d o f i n t e r v i e w s i t h a s b e c o m e o b v i o u s t h a t t h e o u t p u t f o r m a t s h o u l d l o o k m o r e l i k e a n A m a z o n P R - F A Q w h i c h s t a n d s f o r P r e s s R e l e a s e a n d   
    F r e q u e n t l y A s k e d Q u e s t i o n s . T h e r e f o r e a s w e p r o g r e s s t o w a r d s M V P i t w i l l b e r e q u i r e d t o c h a n g e t h e r e p o r t f o r m a t t o P R - F A Q .

# Actions

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

1. S y n t h e s i z e t h e 2 0 1 4 a n d 2 0 1 9 i n t e r a c t i o n s i n t o a s i n g l e s t u d y , a n a l y z e a n d u n c o v e r a n y w e a k n e s s e s . | S t a t u s : D o n e
2. P e r f o r m i n t e r v i e w s , d o c u m e n t t h e s e a s i n t e r a c t i o n s a n d i n g e s t i n t o t h e m e d i u m r o a s t . i o t o h e l p r e m e d y t h e w e a k n e s s e s o f p r e v i o u s i n t e r a c t i o n s . | S t a t u s : I n p r o c e s s
3. M o d e l a n d m a n a g e t h i s C u s t o m e r I n s i g h t s s t u d y i n t h e m e d i u m r o a s t . i o | S t a t u s : I n p r o c e s s
4. R e v a m p t h e u s e r e x p e r i e n c e s a n d a s s o c i a t e d b a c k e n d t o f o l l o w t h e n e w f i n d i n g s . | S t a t u s : I n p r o c e s s