Silence the Voice of the Customer

Focus on the "job-to-be-done" and create breakthrough products and services

by Anthony Ulwick

Over the past 30 years, voice-of-the-customer experts have led companies to believe that it is impossible to know all their customers' needs. They contend that customers can't articulate their needs, and that customers have latent needs—or needs they don't know they have. What if it turns out that this thinking is wrong? Here is the answer: instead of failing 80 percent of the time, companies will succeed in their innovation efforts 86 percent of the time. How do we know this? Because over the past 20 years we have created and refined an innovation process called Outcome-Driven Innovation® (ODI) that invalidates this old thinking. In addition, a ten-year track record study reveals that when the world's most respected companies silence the voice of the customer and gather the right inputs for the innovation process, they experience an 86 percent success rate. This is a complete turn-around in the innovation industry. Learn how thinking about customer needs from a "jobs-to-be-done" perspective enables companies to create winning growth strategies and breakthrough products and services.

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Introduction

Strategyn's innovation methodology and comprehensive innovation programs are being adopted by many respected companies that are seeking to improve their innovation practices—companies such as Johnson & Johnson, Ingersoll Rand, SHRM, Hewlett-Packard, Colgate-Palmolive, Pershing, and dozens of others. With 20 years of experience implementing its practices in companies around the world, Strategyn has been able to evolve, test and refine its ideas and methodology. As a result, Strategyn considers itself well qualified to challenge the VOC practices that for years have produced less than stellar results. That being said, when it comes to understanding customer needs, Strategyn agrees with VOC practitioners that:

• innovation and new product development should be guided by an understanding of customer needs;

• to be successful at understanding customer needs, you need a structured process;

• customer needs and solutions are distinct;

• it is not the customer's job to come up with solutions; it is the developer's job.

But when it comes to capturing needs for innovation, we are in strong disagreement regarding:

• the framework for capturing customer needs,

• the definition of a customer need, and

• the notion that VOC offers the level of specificity required to enable clear and actionable innovation.

These differences in our opinion are largely due to the fact that Strategyn's research practices are optimized for innovation: they are designed to capture and prioritize the customer inputs that planners and strategists need in order to discover market opportunities and devise winning product concepts that can then enter the development process. Strategyn's methodology is counterintuitive to many longtime VOC practitioners because traditional VOC tools, which were created in the 1980s, were intended to help engineers craft products and make design trade-off decisions after products had entered into development—in other words, after the product idea had already been generated. Traditional VOC practitioners have for years tried to persuade companies that the same tools are useful for innovation, but that is simply not the case, as product failure rates of 70 to 90 percent attest. Yet despite VOC's ineffectiveness when it comes to innovation, its supporters continue to push and defend its applicability.

Strategyn believes a 70–90 success rate is achievable, but not with the same old thinking and the same old tools. Because traditional VOC practices are flawed, many companies have come to believe that customers often do not know, or can not communicate effectively, their actual needs and requirements. This is one of the major challenges facing businesses today. Because of this, businesses need to continue to find more creative methods of understanding customer requirements. Strategyn offers such a method. This article highlights the advantages of Strategyn's ODI methodology and the key differences between it and traditional VOC practices. It explains why it is a superior tool for product and service innovation.

The Job, Not the Product

As people make their way through each day, they encounter tasks or jobs that they must get done. To help get these jobs done, people hire products and services. Thus, from a customer's perspective, products and services are acquired as a means to help them get jobs done. This concept, which was introduced by Theodore Levitt back in 1975, when he said "people don't want a quarter-inch drill, they want a quarter-inch hole," has driven our thinking for years, and other prominent academics are in solid agreement with this basic construct. Harvard Business School professor Clayton Christensen, for example, says, "the job, not the customer, is the fundamental unit of analysis for a marketer who hopes to develop products that customers will buy." What makes Strategyn's methodology for understanding customer needs unique and revolutionary is that it is focused on the job the customer has hired a product to perform rather than on the product, which is the inherent focus of traditional VOC practices. With a job focus, companies are better able to understand customer needs in existing markets and are also able to capture a full set of needs in markets in which products and services have yet to be created (white space, blue ocean), making Strategyn's methodology a superior tool for sustaining as well as breakthrough innovation.

ODI critics often fail to understand the ramification that a job focus has on gathering the customer inputs. Whether the goal is to devise a new product concept (innovation) or improve a product design (development), traditional VOC practice starts not with the job but with a product or service (such as a razor or a movie theater) and then works to understand customer needs relative to that solution.[1] When applied to innovation, this approach may, on occasion, result in the creation of a slightly better mousetrap (a sharper razor or cleaner theater), but works to block the creation of breakthrough concepts (such as Nair or Netflix). In addition, because of its product focus, traditional VOC practice also tends to result in the collection of needs that relate to what we call consumption chain tasks (acquiring, receiving, setting up, using, maintaining, and disposing of a product) rather than the collection of needs that relate to the functional job the customer is trying to get done, even though the job is the reason the customer is using the product in the first place.

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1 See, for example, Abbie Griffin, "Obtaining Customer Needs for Product Development," in *The PDMA Handbook of New Product Development,* ed. K. Kahn, G. Castellion, and A. Griffin (Hoboken, NJ: John Wiley & Sons, 2005), 211–27. Griffin says, "VOC indirectly discovers wants and needs by walking customers through the ways they currently obtain or acquire and use products and services to fulfill particular needs."

The Framework for Understanding Customer Needs

Before an attempt is made to capture the customer's needs for the purpose of innovation, Strategyn's methodology requires that a company first understand exactly what job the customer is trying to get done. This is accomplished by conducting customer interviews to understand the discrete process steps that comprise the job. The breakdown of the job into these discrete steps is translated graphically into a job map. Job mapping has many benefits, all of which are discussed in "The Customer-Centered Innovation Map" (Harvard Business Review, May 2008). Its primary purpose is to provide a framework around which to capture and organize need statements and to ensure that all the customer's needs are captured. Without this insight, a researcher will never know where questioning should be focused or whether or not all the customer's needs have been uncovered. This has been another ongoing problem with traditional VOC methods.

The goal of innovation is to devise new product and service concepts that address unmet needs. The best way to accomplish this is to first uncover all the customer's needs, then determine which are unmet, and then devise solutions that address them. Traditional VOC practices are ineffective because companies are incapable of capturing or knowing when they have captured all the customer's needs. VOC grouping methods, such as affinity diagrams, not only create an imprecise structure for knowing whether all needs have been captured, but also limit the level of detail at which a market can be studied. This thinking is restricting and self-serving: it makes the life of the practitioner easier, but at the expense of getting to the level of detail needed to achieve higher success rates. With a focus on the job, customers are able to articulate all their needs regarding its execution. If a customer has 100 or more different, detailed needs, why wouldn't a company want to understand exactly which ones represent the best opportunities for innovation?

Defining What a Customer Need Is—with Precision

With a solid knowledge of the job the customer is trying to get done, the collection of customer needs for the purpose of innovation can commence. Here too, Strategyn's approach is unique: it aims to understand and capture the metrics customers use to measure the successful execution of each step in the job they are trying to get done. Those metrics are the customer's needs: Strategyn defines customer needs as the metrics customers use to measure the successful execution of a job. For reasons we will address later, these needs must be expressed in a statement that has a specific structure and uses a particular syntax if they are to be effective inputs into the innovation process. (See "Giving Customers a Fair Hearing," Sloan Management Review, Spring 2008 for details.) These metrics are known in the outcome-driven world as the customer's desired outcomes because they explain what the customer wants to achieve when executing the job. The name "outcome-driven innovation" originated in the recognition of these metrics.

In his September 2008 critique of the ODI method, Gerry Katz, vice president of the VOC-oriented consulting firm Applied Marketing Science, Inc., criticized the term desired outcomes, saying, "[In distinguishing between needs and solutions] Ulwick adds the term desired outcomes… a useful description to be sure, just as Christensen has popularized the term jobs. But neither of these is conceptually any different from the other terms that have been in use since at least the mid-1980's: wants, needs, requirements, benefits, problem, tasks that the customer is trying to accomplish, and jobs which the customer is trying to get done."[2] Elsewhere, Katz says, "Ulwick advocates a focus on desired outcomes, a method he argues is different from traditional VOC. But aren't needs, in fact, always either desired outcomes or an expressed wish that will lead to a desired outcome?"[3]

> The VOC approach to innovation is weak, in our view, in large part because it fails to state clearly, successfully, and definitively just what a customer need is.

We clearly do not support the view that all these terms are conceptually the same. The VOC approach to innovation is weak, in our view, in large part because it fails to state clearly, successfully, and definitively just what a customer need is. Despite all the talk about satisfying customer needs, the VOC community cannot say what the focus, structure, and content of a customer need statement should be. Without agreement on what input is being sought, VOC becomes an anything-goes proposition. Anything a customer wants to talk about becomes an acceptable customer input.

In our view, the VOC industry was unintentionally led in the wrong direction and set back for years when, in 1993, Griffin and Hauser defined need as "a description, in the customer's own words, of the benefit to be fulfilled by the product or service."[4] The stipulation that the description be "in the customer's own words" continues to lead practitioners astray as it has long been accepted as a VOC best practice. As we have suggested above, the input companies need to be successful at innovation is not a transcription of customers' heartfelt remarks regarding a product or service; rather, it is a statement that results from understanding how customers measure the successful execution of a job. Strategyn's qualitative research methodology is designed around and optimized for capturing these statements. For each process step on the job map, the goal is to understand what makes that step time-consuming, unstable, or unpredictable, and what makes it inefficient. For those with business process improvement or a Six Sigma background, this is akin to deconstructing a business process and determining what metrics must be measured and controlled to produce a predictable output.

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2 Gerry Katz, "A Critique of Outcome-Driven Innovation," September 2008, 3.
 The article is available at http://www.ams-inc.com/pdf/ODI_Critique.pdf.
3 Gerry Katz, "Hijacking the Voice of the Customer," *PDMA Visions Magazine,* January 2006, 8–9.
  The article is available at http://www.ams-inc.com/publications/reprints/voc_hijack.pdf.
4 Abbie Griffin and John Hauser, "The Voice of the Customer," *Marketing Science 12,* no. 1 (Winter 1993), 1–27.

There is one other important consideration that traditional VOC practitioners fail to make when thinking about customer needs. Companies can also innovate and grow markets by devising solutions that help customers get more or other jobs done. As a result, when capturing customer inputs for innovation, we also seek to understand what those other jobs are. As an output of a typical research effort then, we capture the metrics customers use to measure the successful execution of a core job of interest and also capture a list of other jobs that customers are trying to get done in that situation. [See Figure 1: The Customer Input Hierarchy, to see how we organize customer inputs and where and how emotional jobs and consumption chain jobs are also considered.] This is the level of specificity at which a market must be analyzed to ensure success at innovation and at marketing as well. The inputs collected as part of Strategyn's approach serve to guide and align a company's product, branding, communications, selling, R&D and M&A strategies.

Figure 1. The Customer Input Hierarchy
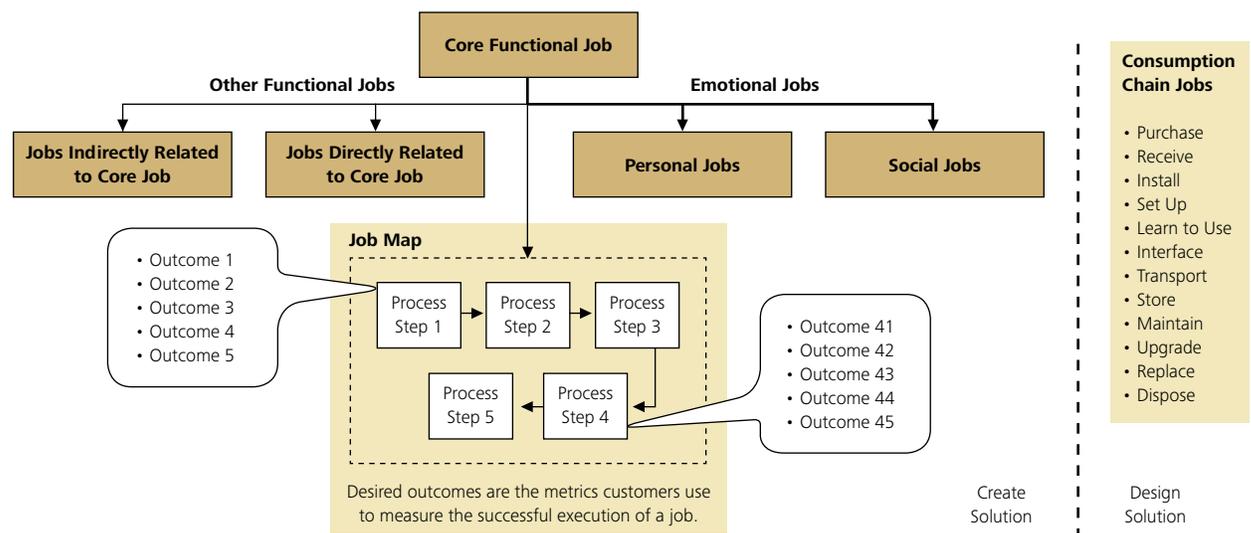
As companies decide what innovation process and practices they want to adopt, we, like our competitors, believe that companies should understand the inherent weaknesses of each. Traditional VOC practices, when applied to innovation, have failed to deliver success rates greater than 10–30 percent. Strategyn's methodology has the potential to achieve much higher success rates as it analyzes customer needs from the right perspective for innovation (the job) and at the level of detail required to ensure success (the desired outcome).

Like any methodology, Strategyn's approach is not perfect, but it is close, and we are always working to improve it. Katz and other traditional VOC practitioners criticize ODI for what they claim to be lengthy surveys and complicated methods: we would argue that any research process has trade-offs, and we are willing to trade off ease of process for completeness of information needed to succeed at devising breakthrough product concepts. Some companies, including Microsoft, have been kind and supportive enough to work with us to overcome any complexities and the concerns of traditional market researchers. The remaining risks in using this innovation methodology, in our opinion, are minor and are far outweighed by the benefits.

Advancing the Innovation Process

In the rest of this paper, we hope to further clarify our divergence from traditional VOC positions held by Katz and others. Our chief aim is not to tear down our competitor's measurement and analysis process, but to defend the validity of our own process as a superior tool for product and service innovation.

Methods of Data Collection

Traditional VOC position: In "A Critique of Outcome-Driven Innovation," Katz faults Strategyn for its position that focus groups, one-on-one interviews, and ethnography are equally useful for eliciting customer needs. "Academics and practitioners disagree," he says.[5]

Strategyn's view: Academics and practitioners disagree because they are not trying to capture job and outcome statements. Focus groups, one-on-one interviews, and ethnography work equally well when the task is eliciting customer needs—but only when the needs that are being sought are job and desired-outcome statements. If a practitioner is not clear on what a customer need is or if the job is not explicitly stated as the unit of analysis, then we agree with Katz that ethnography is the better approach. But the reason why this is so is revealing: it is because ethnography enables the interviewer to witness the customer getting a job done, which places the focus on the job, not the customer or the product.

With a job focus, the interviewer is able to witness needs that traditional practitioners struggle to elicit from customers using one-on-one, group, or other interviews—all techniques that inherently give them a product focus. Ethnographic techniques increase the likelihood that practitioners will find what they believe to be latent, hidden, unarticulated or difficult-to-articulate needs. However, as we have proven over the years, practitioners who explicitly make the job the unit of analysis and use a job map to direct their focus can capture the same needs very easily using any method.

We maintain that just because there are some needs that a traditional VOC practitioner cannot easily elicit, this does not mean the need is latent, hidden, unarticulated, or difficult to articulate. It is much more likely to mean that the practitioner doesn't know what a need is or how to capture a legitimate need statement (one focused on a job or an outcome) from a customer. With a job focus, customers are willing and able to communicate all their needs—there are no latent or unarticulated needs.

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5 Gerry Katz, "A Critique of Outcome-Driven Innovation," 3.

The Best Approach to Soliciting Customer Needs

Traditional VOC position: Katz writes, "To uncover wants, needs, jobs, and desired outcomes research has shown that the most useful method is to discuss past experiences with these types of products or services in trying to accomplish the desired tasks."[6]

Strategyn's view: First, job and outcomes statements are two different customer inputs sought for two different reasons. Outcomes are sought so companies can gain insight into helping customers get a job done better, whereas jobs statements are sought to help the company understand what adjacent markets it should enter. Second, having customers discuss their past experiences with products ensures that the interview will focus on the product rather than the underlying job the product has been hired to perform. A product focus will not result in the required customer inputs.

The most effective way to uncover desired outcomes is to first create a job map—that is, to dissect the job of interest into its discrete process steps—and then for each step to determine how the customer measures successful execution. A skilled interviewer can guide the customer conversation around the job map, rather than through discussions regarding past experiences with products.

Interviewing Techniques

Traditional VOC position: In the chapter he contributed to *The PMDA ToolBook 2* of *New Product Development,* Katz writes that when customers offer a solution, an engineering characteristic, or a laboratory technical specification they think does a good job of addressing their need, "a good interviewing technique is to ask them why they think that would be a good solution. This often provokes them to state the real underlying need."[7]

Strategyn's view: It is not enough to ask customers why. In fact, asking them why too often may simply annoy them. Once the job the customer is trying to get done is understood and a job map is created, a far superior interviewing technique (which will keep the conversation away from solutions and specifications to begin with) is to ask, for each step in the job map, what makes that step time-consuming, unstable, unpredictable, inefficient, challenging, or problematic. This will result in statements that can be captured as the metrics customers use to measure the successful execution of the job being studied.

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6 Ibid., 4.

7 Gerry Katz, "The Voice of the Customer," in *The PDMA ToolBook 2* of *New Product Development,* ed. P. Belliveau, A. Griffin, and
   S. Somermeyer (Hoboken, NJ: John Wiley & Sons, 2004), 167–99.

An Appropriate Number of Need Statements

Traditional VOC position: Katz criticizes Strategyn's method because we often seek to prioritize more than 100 need statements. He says that this is too much detail for a product development team to deal with and asserts that "virtually every author and practitioner in the field recommends using an affinity diagram to reduce the complexity to a more workable 15–25 groups of highly related needs."[8]

> We agree that development teams cannot focus on all 100 or more needs, but the reduction in focus should come after the needs have been prioritized by customers, not before.

Strategyn's view: The fact that this thinking has long been accepted does not make it right. In fact, it is seriously flawed. The primary objective in understanding the customer's needs for the purpose of innovation is to determine which are unmet so the resulting opportunities can be addressed with new products and services. We agree that development teams cannot focus on all 100 or more needs, but the reduction in focus should come after the needs have been prioritized by customers, not before. Grouping the needs before they are prioritized simplifies market research activities, but the simplification comes at the expense of the rich level of detail that the development team needs if it is to achieve a 70–90 percent success rate. This is not the right trade-off to make as planners and strategists require insight into all customer needs to appropriately devise a product concept and a market strategy.

Traditional VOC practitioners would argue that grouping the needs in advance is acceptable because solutions tend to impact most if not all of the needs in a given cluster, but we find that this is only true if the needs are redundant to begin with. Using strict quality checks, Strategyn's methodology assures that redundant needs are not listed.

Survey Length

Traditional VOC position: Katz faults Strategyn's methodology for its long surveys, saying the surveys are unreasonably tedious for the respondent. He says that asking the respondent to rate the performance of two or three separate products and services for 100 or more needs—essential for product-to-product comparisons—is too much to ask. He also notes that long surveys can result in respondent fatigue and spurious responses.

Strategyn's view: We agree that what Katz describes is too much to ask, but Strategyn does not ask this. We ask the respondent to identify the product or service they use most often to get the job done and to rate satisfaction with just that one product in mind. Since different respondents use different products to get the job done, product-to-product comparisons can be made after the data is collected. This is the only approach we have ever used.

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8 Gerry Katz, "A Critique of Outcome-Driven Innovation," 5.

As for respondent fatigue, which indeed is a concern with longer surveys, Strategyn is careful to take the necessary precautions. When we require respondents to answer a large number of questions, we will often divide the questions among a large pool of respondents rather than having all the respondents answer all questions. Or, we may have respondents start the survey at different points. We also have quality checks to ensure that we eliminate surveys that show signs of fatigue, such as "straight-lining" or "zigzagging" (i.e., the respondent simply marks answers in a straight-line pattern or a zigzag pattern rather than considering the questions seriously).

Through our research over the years, we have identified over a dozen sources of variability that VOC practitioners unknowingly introduce into their need statements.

Concern over respondent fatigue, however, should not outweigh the desire for complete and usable insight into customer need priorities. Our methods can make our research more costly, but we would rather spend more on our research, knowing that the results will be usable, high-quality data, than embrace lower-cost research methods that fail to provide the detailed insights necessary for innovation.

The Structure and Syntax of a Need Statement

Traditional VOC position: Katz claims that Strategyn's key reason for standardizing the structure of a need statement is to remove ambiguity for both the customer and the product developer, but he says that using a standardized structure for this purpose runs counter to the prevailing wisdom of VOC.

Strategyn's view: Ambiguity is a source of concern when capturing customer needs, but it is not our motivation for standardization. Standardization serves a much broader purpose: it ensures the customer's unmet needs can be accurately prioritized. The goal in prioritizing need statements is to determine which needs are more important and less satisfied than others. With this goal in mind, it is prudent to remove all sources of variation within and between need statements so that only the actual need is being rated. When structure and syntax vary, false importance and satisfaction ratings are not only possible, but likely, and the result is an invalid prioritization.

Through our research over the years, we have identified over a dozen sources of variability that VOC practitioners unknowingly introduce into their need statements. Practices as seemingly harmless as using a variety of words to introduce statements can deteriorate a research effort. It is true that the words minimize, reduce, decrease, prevent, and eliminate all seem to have similar meaning, and using them interchangeably seems natural, but using different words to introduce the same statement can dramatically alter the importance and satisfaction scores that a respondent offers. Similarly, when vague adjectives or adverbs are used in different statements, it can affect how those statements are prioritized. So can referring to a handheld device as a "tool" in one statement, an "instrument" in another statement, and a "device" in a third statement. When all this extra variability enters the picture, the chances of getting a clear reading regarding which customer needs are truly unmet decrease dramatically. We agree that standardization may make a set of statements more boring to read, but as we take steps to alleviate boredom, we prefer to err on the side of prioritization accuracy rather than reading excitement.

The Sanctity of the Customer's Words

Traditional VOC position: Katz says that altering customers' words violates a long-standing VOC best practice: "to preserve the customers' own words as much as possible, so as not to alter their meaning or inadvertently read a different meaning into what the customer has actually said." He adds that "Strategyn's approach… runs counter to prevailing wisdom of VOC" by presenting a voice to the customer that is not their own.[9]

In traditional VOC, review of customers' transcripts happens after the interview, by which time it is too late to ask what the respondent meant by a particular word choice.

Strategyn's view: Strategyn focuses on the job the customer is trying to get done, and as a result, interviewers ask customers what makes each step in the job time-consuming, challenging, problematic, and unpredictable—all questions that encourage customers to talk about the metrics they use to measure the successful execution of the job. As is the case with traditional VOC interviews, the responses the customers give will vary in wording from person to person. In the context of a traditional VOC interview, if customers are talking about their needs vis-à-vis a movie theater, for example, one customer might say he or she wants "no sticky floors" while another might say "keep the floors in the theater from being sticky," and a third might say "I don't want anything on the floors when I walk into the theater," and so on. The researcher must then choose among those voices and present one statement that the researcher thinks best captures the need that has been expressed. Thus, even in VOC, the voice of the researcher is introduced.

Strategyn too chooses among the voices that have been heard to present one statement that we think best captures the need that has been expressed. For example, if a customer were to say that he or she wanted to have "no sticky floors in the theater," then an outcome statement might be worded "Minimize the likelihood that the floors in the theater are sticky." This is the customer's wording, but articulated with a syntax and structure that will make precise prioritization possible. Further, we validate the statement in its new format in real time with customers during the interview to ensure that we did not alter the meaning. In traditional VOC, review of customers' transcripts happens after the interview, by which time it is too late to ask what the respondent meant by a particular word choice.

Given that the voice of the researcher is present in both traditional VOC and in ODI, we believe it is wiser to capture need statements in a standardized format that is optimized for prioritization and is focused on the job the customer is trying to get done.

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9 Ibid., 7.

Strategyn's Opportunity Algorithm

Traditional VOC position: Katz claims that Strategyn's opportunity algorithm is both technically and intellectually flawed because it combines two separate constructs—importance and satisfaction. These entirely separate constructs should not be used in the same equation.

Our analysis of the algorithm's use over the past eight years reveals that it is over 90 percent accurate at prioritizing market opportunities, and we are working to create a 100 percent accurate algorithm.

Strategyn's view: Strategyn's opportunity algorithm improves upon traditional gap analysis, a tool that has for years been widely accepted for use among VOC practitioners and product developers. Interestingly, gap analysis, a technique that Katz advocates, combines the same two separate constructs—importance and satisfaction—and has also been used to help identify unmet needs. Gap analysis, however, truly does have an inherent flaw: it fails to prioritize unmet customer needs effectively because it only considers the gap between importance and satisfaction and not the actual importance of a need statement. As a result, a need that has an importance of 9 and a satisfaction of 5 has the same gap as a need that has an importance of 5 and a satisfaction of 1. The gap in both cases is 4, yet intuitively the opportunity is not the same. Gap analysis would treat these as equal opportunities, even though one need is far more important than the other. Strategyn's opportunity algorithm, which was introduced in the January 2002 issue of the _Harvard Business Review,_ corrects this problem by giving more weight to the importance construct. Our analysis of the algorithm's use over the past eight years reveals that it is over 90 percent accurate at prioritizing market opportunities, and we are working to create a 100 percent accurate algorithm. The opportunity algorithm is equally effective at identifying needs that are overserved (more satisfied than important), thereby revealing needs that are ripe for disruption or cost reduction.

The care and precision that have gone into creating and perfecting the ODI methodology do not stop with what we have presented here. They have also gone into the methods we have evolved over the past 20 years for preventing respondent bias, preventing respondent confusion between constructs, optimizing the rating scales, cleaning data, and all other facets of the qualitative and quantitative research processes. There are no "troubling weaknesses" in Strategyn's methodology as Katz suggests in his recent critique. While VOC methods yield 80 percent failure rates, ODI results in 80 percent success rates. Thus, any remaining risks in using the methodology, in our opinion, are minor and are far outweighed by the benefits.

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