

CUSTOMERS

# The Best Way to Understand Your Customers

by [Peter Merholz](#)

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Recently, Sprint Nextel announced that in Q4 2008, they lost 1.3 million customers. It's tempting to blame the recession, but then how do you explain AT&T Wireless gaining 2.1 million subscribers, and Verizon gaining 1.4 million? Forrester's 2008 Customer Experience Index suggests a reason. Sprint Nextel was far and away the worst-ranked of the wireless service providers. Out of all the companies (from a range of industries), Sprint Nextel ranked 108 out of 114. Verizon Wireless ranked 59th, and AT&T 64th. **It's in difficult economic times that customer experience matters most** — you don't want to make it even easier for your customers to walk away because they've been so frustrated working with you.

The key to delivering a great experience for is to have empathy for your customers. And the best way to develop that empathy is obvious, yet it requires constant repeating: **Go to them.** It's shocking how many methods companies have for learning about customers (surveys, focus groups, phone questionnaires), and how hesitant they are to engage in the simplest approach. I suspect it's because they're afraid of what they'll find when engaging customers directly, and prefer to hide behind the reports and charts those other techniques produce, and which provide endless opportunities for interpretation.

When you go to your customers and encourage them to talk to you, you should speak only to break the ice and get them comfortable, and then to ask questions. The rest of the time, stay quiet and listen. Ideally, you will spend a lot of time just watching — if they're at

home, how do they go about their domestic rituals? If at an office or out in the world, how do they get things done? Pay attention to their context, their environments. What tools and artifacts do they use? What does their language reveal about their state of mind?

Record everything you can. Take notes and videotape the entire session. Photograph anything of interest (think *CSI*). Most people you work with can't go be with customers, so these recordings are crucial in bringing what you've seen to them. In building empathy throughout a company, there is little as powerful as the highlight reel. Take the time to edit your video down to a 5- to 10-minute piece that depicts the core of what you witnessed. You'll be amazed at how eagerly your colleagues take to watching their customers in their natural environments.

Such highlight reels are not sufficient, though, in that they inevitably leave a lot out. In our experience, **the single tool that does the best job at spreading empathy throughout a business is the Persona**. Personas are fictional characters distilled from the research you conducted. When crafted well, they address the breadth of what you experienced directly in your research, but in a manageable way that can be appreciated by others.



For a project with Microsoft, my colleagues Todd Wilkens and Paula Wellings developed personas of designers and developers of Rich Internet Applications (RIAs). Our client at Microsoft has been gracious enough to allow me to offer one of the personas for download. It depicts Natalie (seen at left), who leads design teams working in RIAs.

Please forgive the technical content of this persona, and instead focus on its structure. A good persona contains a few key characteristics. Remember, the whole point of this is to encourage empathy.

**1. Give your personas names.** Refer to them by those names. Avoid silly or alliterative names. Also avoid placing your persona in a category (like “Stay-at-home-Mom”). Silly names and categories allow people to stereotype the persona, and thus treat them as an other, not as someone potentially just like themselves.

**2. Call out your personas key behaviors and motivations.** In order to deliver a great experience, you need to understand why people would engage with that experience, and how they would go about it.

**3. Include basic demographic information.** But only to the degree that helps a reader better understand who your persona is. Age, income, occupation, marital status can be informative. They just shouldn’t be the only thing.

**4. Provide a statement in the persona’s voice.** This is one of my favorite aspects of a persona. With Natalie, it’s “Our work is about the larger vision. Our clients come to us asking ‘What will be the next thing that we need to solve?’” This statement might be something you heard in a research interview, or it might be a fabrication. It’s no coincidence that persona is the beginning of the word “personality,” and this quote will allow others to see a distinct person.

**5. Up at night.** We’ve recently begun identifying what keeps our persona “up at night.” In my world of product design, our personas must drive design decisions. Design is often used to minimize or remove pain points, so “up at night” can help us further focus our efforts.

With these techniques and tools, your colleagues can begin to understand their customers as people, to understand them as they understand themselves. You’ll notice a marked change when your colleagues stop fighting over bulleted lists in PowerPoint and start fighting over how best to serve Andy (or Tom, or Erika, or whatever you name your personas).

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