Taking VOC to the Next Level:
Define, Differentiate, Disrupt

November 8 – 10, 2004 **Boston**

Master the art and science of Voice of the Customer (VOC)

Gain consensus on customer "must-haves"

Create winning products your competitors never even dreamed of!

PRESENTED BY

The
MANAGEMENT
ROUNDTABLE

Featuring 'Voice of the Customer' Pioneers

Abbie Griffin
Professor of Business Administration,
University of Illinois

John Hauser
Kirin Professor of Marketing,
MIT Sloan School of Management

Vince Barabba
Former General Manager, Corporate
Strategy & Knowledge, General Motors

All-new case presentations from experienced practitioners at

Hewlett-Packard
Dow Chemical
Microsoft
Baxter Healthcare
BCBS of Florida
CNH
Ethicon Endo-Surgery
Sara Lee Foods
and more

Having a deeper understanding of what makes your customers tick is a critical ingredient in creating truly innovative new products in today's world of fierce competition, product proliferation and global markets.

Taking VOC to the Next Level:
Define, Differentiate, Disrupt

November 8 – 10, 2004   **Boston**

ALTHOUGH MANY COMPANIES HAVE INVESTED HEAVILY IN *voice of the customer* techniques, few have been able to effectively gather, analyze and fully integrate that pivotal information into product development. All too often a communication gap between marketing and engineering can lead to VOC data translation errors and ultimately, missed opportunities.

But just how do you find out what your customers *really* want and ensure that those needs (and wants) are accurately relayed into product specifications? How do you determine what new concepts have the potential to be "disrupters"? Are some VOC methods better than others—customer interviews versus customer observations versus virtual customer methods? And how do you gain buy-in and reach consensus on the key customer requirements?

To answer these questions and help companies gain the latest insights and strategies on how to capture the customer's voice and use it to gain competitive advantage, Management Roundtable announces, **Taking VOC to the Next Level: Define, Differentiate, Disrupt, November 8–10, 2004** in **Boston**. Join the foremost experts in VOC and advanced practitioners from leading companies as they discuss how to:

- Engage customers to gather, manage and prioritize input throughout the product development process
- Determine what specific VOC data you need, and how to get it
- Decide which features are requirements and which are expendable
- Capture VOC and effectively translate your customer data into product requirements your team can understand and deliver
- Combine your VOC data with competitive intelligence to define your next killer product

Find out what VOC techniques best-in-class companies are deploying (and those they are not), how to implement them at your company and walk away with strategies, tools and new approaches to determine what your customers truly can't live without!

Who Should Attend

Vice Presidents, Directors and Managers of Product Development, Engineering, Marketing, as well as Senior Managers of Customer Strategy Implementation, Product Managers, Program Managers, and Project Managers involved in product definition.

Given the critical cross-functional nature of this topic, this program is an excellent opportunity for marketing and engineering managers to attend together (see page 11 for team discounts).

The Management Roundtable

The Management Roundtable is the leading knowledge and networking resource for product developers. Practitioner-oriented and unbiased, our focus is on providing actionable information about new innovations, processes, tools, and technologies that enable faster time to market, increased profitability, and overall competitive advantage.

Founded in 1980, The Management Roundtable publishes the PEER-award-winning Product Development Best Practices Report, offers an online database of PD Best Practices, hosts a variety of specialized conferences and workshops, and conducts customized research, onsite training and expert referrals.

AGENDA

Monday, November 8, 2004   Pre-Conference Workshops

7:00 – 8:00	Registration and Continental Breakfast
8:00 – 12:00	MORNING SESSIONS

    A. *How to Interview Customers: Skills, Tools and Secret Success Tips* – *Gerry Katz, Applied Marketing Science*

    B. *Capturing the White Space with Ethnographic Tools* – *Jerry McColgin, Venture2, Inc.*

12:00 – 1:00	Lunch
1:00 – 5:00	AFTERNOON SESSIONS

    C. *Beyond Quantitative Research: Integrating VOC for Less 'Ho-Hum' and More 'Wow'* – *Sheila Mello, PDC*

    D. *Must-Have or Nice-to-Have? Using Conjoint Analysis to Measure and Decide* – *Brian Ottum, Ottum Research & Consulting*

Tuesday, November 9, 2004   Conference Day One

7:00 – 8:00	Registration and Continental Breakfast
8:00 – 8:15	Opening Remarks, Management Roundtable
8:15 – 9:30	KEYNOTE ADDRESS: *State-of-the-Art in VOC: Proven Practices and Emerging Techniques* **Abbie Griffin**, *University of Illinois, Urbana–Champaign, College of Commerce*

OBTAINING TRUE CUSTOMER NEEDS: TRADITIONAL VS. NON-TRADITIONAL METHODS

9:30 – 10:30	CASE STUDY: *Ethnography and Participatory Design: Bridging the Gap Between Customer Voice and Impact in Product Development* *Anne Cohen Kiel,* **Microsoft Corporation**
10:30 – 10:45	Refreshment Break
10:45 – 11:45	CASE STUDY: **Whirlpool** (invited)
11:45 – 12:45	Lunch
12:45 – 1:45	CASE STUDY: *Converging VOC Methodologies to Create an Optimal Enterprise Customer Web-Site Experience* *Tom Graefe and Craig Neely,* **Hewlett-Packard**

WHEN, WHY AND HOW TO ENGAGE CUSTOMERS   SESSION CHAIR: GERRY KATZ, APPLIED SCIENCE MARKETING

1:45 – 2:45	CASE STUDY: *Hearing Voices in Florida—A Service Company Focuses on Customers* – *Melissa Rehfus,* **BCBS of Florida**
2:45 – 3:00	Refreshment Break
3:00 – 4:00	CASE STUDY: *Deploying VOC Throughout the Product Development Process* – *Bob West,* **Baxter Healthcare**
4:00 – 5:15	KEYNOTE ADDRESS: *Virtual Customer Methods to Improve Speed, Accuracy, and Usability of Customer Input in the Product Development Process* **John Hauser**, *MIT Sloan School of Management*
5:00 – 6:30	Networking Reception

Wednesday, November 10, 2004   Conference Day Two

7:00 – 8:00	BREAKFAST ROUNDTABLE: *Emerging VOC Tools Discussion*
8:00 – 9:15	KEYNOTE ADDRESS: *Aligning VOC Practices with Alternative Business Designs* **Vince Barabba**, *General Motors*
9:15 – 10:15	CASE STUDY: *Using VOC to Link Technology to Market Opportunity* – *Kurt Swogger,* **Dow Chemical**
10:15 – 10:30	Refreshment Break
10:30 – 11:30	PANEL DISCUSSION: *If Only I Had Known "X" Before I Started VOC—How to Navigate the Bumps in the Road While Engaging in VOC* *Panel Moderator: Gerry Katz, Applied Marketing Science; Panelists: Conference Faculty*
11:30 – 12:30	Lunch

MAKING VOC A REALITY: LEADERSHIP, TEAM COMPOSITION AND BUY-IN   SESSION CHAIR: SHEILA MELLO, PDC

12:30 – 1:30	CASE STUDY: *The Role of Leadership in the Voice of the Customer* – *John Fowler,* **CNH**
1:30 – 2:30	CASE STUDY: *Achieving Team & Organizational Ownership of the VOC Process* – *Lucia G. Buehler,* **Ethicon Endo-Surgery**
2:30 – 2:45	Refreshment Break
2:45 – 3:45	CASE STUDY: *Transforming into a Consumer-centric Brand* – *Kelly Katien and Gordon Smith,* **Sara Lee Foods**
3:45 – 4:00	CONFERENCE TAKE-AWAYS: *Sheila Mello, Product Development Consulting*

TUESDAY, NOVEMBER 9, 2004 • 8:15 – 9:30

Abbie Griffin
Professor of Business Administration,
University of Illinois

State-of-the-Art in VOC: Proven Practices and Emerging Techniques

In this keynote, Abbie Griffin, who co-authored the classic paper "The Voice of the Customer" and is widely acclaimed for her pioneering work in VOC, will share the latest VOC implementation examples from firms at all levels of implementation sophistication. Having conducted extensive research regarding VOC and NPD practices across industries, she is well aware of the latest trends and sustaining success factors. From her presentation, you will come away with a sense of how your company's practices compare to the best-in-class, as well as what you can do to improve. You will hear why certain practices have fallen out of usage, what new techniques are emerging, and which tried-and-true techniques will never go out of style.

Specifically, she will discuss:

• Customer interviewing in the age of privacy protection
• How the Internet has changed customer data collection
• How Six Sigma ties in with VOC?
• How to use VOC in rapidly changing markets

ABBIE GRIFFIN *is a professor of business administration at the University of Illinois, Urbana-Champaign, College of Commerce. She is on the board of directors of Navistar International and was the editor of the* Journal of Product Innovation Management. *She began her career with a B.S. in chemical engineering from Purdue University. After working as a plant engineer for Polaroid Corporation for two years, she earned an MBA from Harvard University. She worked in product and technology commercialization for Corning Glass Works in their biotechnology division and technology consulting for Booz-Allen and Hamilton prior to receiving a Ph.D. in Management of Technology and Marketing from the Massachusetts Institute of Technology. Professor Griffin's research investigates means for measuring and improving the process of new product development. Her papers have been published in publications including* Industrial Marketing Management, Journal of Product Innovation Management, Journal of Marketing Research, Sloan Management Review *and* Marketing Science.

TUESDAY, NOVEMBER 9, 2004 • 4:00 – 5:15

John Hauser
Kirin Professor of Marketing,
MIT Sloan School of Management

Virtual Customer Methods to Improve Speed, Accuracy, and Usability of Customer Input in the Product Development Process

MIT's Virtual Customer Initiative (VCI) is a multi-disciplinary research project developing and testing new theory and methods to improve the speed, accuracy, and usability of customer input to the product development process. Dr. Hauser will talk about new techniques being developed by the MIT team. These include more accurate and more efficient adaptive questioning methods, techniques to infer when customers are using non-compensatory processes, automatic "information pumps" and "information scoring" that provide incentives to respondents to think hard and tell the truth, and new ideation games that enable customers to participate in the idea generation process. He will provide examples from a variety of applications.

JOHN HAUSER *is the Kirin Professor of Marketing and leader of the Virtual Customer Initiative at the MIT Sloan School of Management, where he teaches new product development, marketing management, competitive marketing strategy, and research methodology. He is the co-author of two textbooks,* Design and Marketing of New Product *and* Essentials of New Product Management. *He has received both the Converse Award for scientific contributions and the Parlin Award for contributions to marketing research. He has won awards for research and for teaching, and his students have won awards for their theses and research papers. For six long years he was editor of* Marketing Science. *Outside interests include sailing, swimming, NASCAR, opera, and country music.*

"Griffin and Hauser's 1993 paper, 'The Voice of the Customer,' defined the state-of-the-art in market research and set the stage for the practices that are still in use today."

Alex Cooper, Publisher, Product Development Best Practices Report

Vince Barabba
Retired General Manager, Corporate Strategy & Knowledge Management, General Motors

Aligning VOC with Alternative Business Designs

A critical first step in developing proven VOC practices that will exceed customer expectations is to ensure that there is coherence and consensus between those who collect the information and those who make the final product and marketing decisions.

Mr. Barabba will describe three prototypical business designs that highlight the differences in alternative points of view held by decision makers. These three approaches, *make-and-sell, sense-and-respond,* and *anticipate-and-lead*, anchor the ends of a continuum of simplicity/certainty and complexity/uncertainty, as well as a midpoint that offers a point of view to help clarify the opportunities found at the ends of the continuum.

The importance of getting clarity between these two groups will be highlighted with specific focus on:

• Aligning VOC practices to avoid post-information collection regret
• Specific forms of knowledge and how they fit into alternative knowledge management practices

VINCE BARABBA *recently retired as general manager of the Corporate Strategy and Knowledge Development at General Motors Corporation, where he was responsible for overseeing corporate strategic planning and the Business Decision Support Center. Prior to his work at GM, Barabba was director of market intelligence for Eastman Kodak. He twice served as director of the Bureau of the Census. He is the author of* Meeting of the Mind *(1995 Harvard Business School Press), co-author of* Hearing the Voice of the Market *(1991 Harvard Business School Press), and author of* Surviving Transformation: Lessons Learned from GM's Surprising Turnaround *(2004 Oxford University Press). Barabba received a bachelor's degree in marketing from California State University at Northridge and an M.B.A. in marketing from the University of California at Los Angeles.*

15 KEY BENEFITS
LEARN:

1 How ethnographic research can bridge the gap between the customer voice and impact during the product development cycle

2 Successful approaches to effectively translate your customer data into product requirements that your team can understand and deliver

3 How much VOC is enough — can you minimize time and expense of VOC efforts without sacrificing quality?

4 The importance of aligning your VOC techniques with your business design model; ensuring consensus among those gathering the data and those using it in key product decisions

5 Strategies for using VOC data to drive product priorities, translate customer needs into business process metrics and set product development and improvement priorities

6 The advantages of involving a cross-functional product development team early during the VOC process to instill ownership of the Voice of the Customer

7 New virtual customer methods to improve the speed, accuracy, and usability of customer input in the product development process

8 How to make descriptive customer data useful for engineers and others involved in all stages of product development, from concept development to full-scale production

9 The latest tools and techniques to successfully interview customers and gain access to their unspoken wants and needs

10 How to more accurately analyze, interpret and prioritize customer needs

11 What VOC techniques best-in-class companies are using and what new techniques (and tools) are emerging (costs vs. benefits)

12 What it takes internally to rapidly steer large scale change efforts; how to engage and gain support from senior management

13 Who your real customers are: make sure you're listening to the right voices

14 New "virtual customer" techniques; "information pumps" and "information scoring" to encourage truth-telling

15 Decision-making alternatives such as make-and-sell, sense-and-respond, and anticipate-and-lead for complex scenarios

5

Ethnography and Participatory Design: Bridging the Gap Between Customer Voice and Impact with Product Development

Anne Cohen Kiel, *Senior Design Anthropologist, Customer Design Center,* **Microsoft Corporation**

Historically, there are repeated examples of how technologies are created for the sake of technology but not with "real" people in mind. One of the main goals of ethnographers is to understand the people using products from their own perspective (emic) instead of from a company's perspective (etic). Ethnographers observe and experience the world of technology in people's own environments, where the activities they are tasked with have meaning and a direct impact on their daily lives. By translating what is observed back to product teams—features are only added if they are meaningful (and will actually be used) in the "real world" with "real people." This process can also often impact overall company and marketing strategies. In essence, ethnographers are able to bring the voice of real people into the entire product development cycle.

Take–Aways:
- Key strategies and methods to incorporate ethnographic research into each phase of product development
- Approaches on how to use ethnographic research results to bridge the gap between the customer voice and impact during the product development cycle

Converging VOC Methodologies to Create an Optimal Enterprise Customer Web-Site Experience

Tom Graefe, *Lead Human Factors Principal, and* **Craig Neely**, *Human Factors Engineer,* **Hewlett-Packard**

Hewlett-Packard (HP) employs a range of methods to evaluate customer experience in general, and specifically for their internet presence. For example, surveys play a prominent role in the measurement of corporate performance, and are seen as critical for 'voice of the customer' or 'balanced scorecard' assessment. At the same time, HP internet development programs use a variety of formative and summative user-centered design techniques for specific projects. While the results of these different activities may be shared within an organization, there is little formal basis for comparison or integration of the findings or for understanding their strengths and weaknesses in shaping program decisions. This presentation will review the methods used in designing and evaluating HP's enterprise e-support website, provide an analysis of the relationships among these methods, and describe the lessons learned in integrating them in a common process.

Hearing Voices in Florida: A Service Company Focuses on Customers

Melissa Rehfus, *Vice President, Strategy,* **Blue Cross Blue Shield of Florida**

Blue Cross Blue Shield of Florida (BCBSF), the largest health care company in the state, recently increased the intensity of its customer focus. Recognizing the complex nature of the health care industry, the company completed Voice of the Customer work among four distinct constituencies: individual plan members, group/business decision makers, agents/ brokers, and physicians. This work has become the foundation for understanding different (and sometimes competing) needs and priorities, translating needs into business process metrics, and setting product development and improvement priorities. This presentation will highlight some of the unique challenges faced by service companies in the long journey called "Voice of the Customer" by describing BCBSF's processes, results, and learnings along the way.

Deploying the Voice of the Customer Throughout the Product Development Process—A Medical Device Success Story

Bob West, *Project Director,* **Baxter Healthcare**

After commissioning and completing a rigorous, global "Voice of the Customer" study on an advanced medical product, the product development team continually referred back to those results over the entire 30-month development cycle to decide the initial project scope, to make design decisions, to consider tradeoffs, and even to determine the type and scope of final testing. This presentation will provide a brief look at those VOC results, followed by a series of concrete examples of various activities and choices that were based on those results and the successful outcomes of those decisions.

Using VOC to Link Technology to Market Opportunity

Kurt W. Swogger, *Vice President, R&D Plastics,* **The Dow Chemical Company**

Dow Chemical has developed a Speed-based philosophy to dramatically decrease product cycle time and increase product success. One of the key premises for this philosophy is to link very early customer input and advice to the market and technology validity of a project. Over the years, Dow has used Performance Requirements, Voice of the Customer and QFD from Six Sigma, and the Summit Process™ by Isis to successfully gather information and commitment from its customers. Dow has reduced its cycle times by a factor of three to five and doubled success rates by using the Speed philosophy which focuses on customer and market knowledge and input.

6

The Role of Leadership in the Voice of the Customer: The CNH Story

John Fowler, *Marketing Process Director,*
CNH (Case New Holland)

In 2002, CNH, a group of agricultural and construction equipment brands that includes Case, International Harvester and New Holland, began a process reengineering effort in product development to ensure that two brands resulting from a merger would operate in parallel from a common platform, with a structured process to help avoid conflict and drive improvement. The company realized it needed a process to work the fuzzy front end immediately.

As the leader of the change effort, John Fowler will provide valuable insights on how he and his team worked a process of translating customer needs into requirements. Within the space of weeks they carried out all the strategy and preparation, including customer profiling, competitive selection, product application and utilization. Yet in the end, even though the methods aligned everyone on the project, regardless of function, the senior management team wasn't ready to take the necessary leap. John will describe his strategy to obtain this support along with his successes and failures.

Take–Aways:
- How to turn a pilot project into a burning platform; getting the attention you need to succeed
- How to get from customer needs to product requirements unanimously across functions
- How to effectively and rapidly move away from reactive product development (based on market, technology or competition changes) and substitute a fully effective proactive product development program
- How to steer the change efforts; review an outline of what it takes internally to rapidly bring about such a significant scale of change

"The conference made me aware of how to know your customer's needs—not just listening to the customer but understanding his future needs."
Farid Ahmed, Honeywell

Achieving Team and Organizational Ownership of the VOC Process

Lucia Beuhler, *Group Product Director,*
Ethicon Endo-Surgery, Inc.

How do you implement a critical change in your VOC process once you identify the need for improvement? How do you prove to the teams and the organization that this is a cutting-edge process improvement before hundreds of "how-to" books are published? Ms. Buehler will discuss how Ethicon was able to shift the company culture by addressing:

- How involvement of the cross-functional product development team early in the VOC process provided ownership of the Voice of the Customer
- How the implementation team drove the organizational changes and added credibility to the VOC process improvements
- How "training" was sidelined for facilitated real-time working sessions for each new product development team
- How the current process was built by internalizing the new methods project team by project team

Transforming into a Consumer-centric Brand

Kelly Katien, *New Products Marketing Manager, and*
Gordon Smith, *Director of Research and Development,*
Sara Lee Foods

Kelly and Gordon will tell the story of how the Sara Lee Ball Park brand transformed itself into a consumer centric brand. The presenters will incorporate case examples from their Real Men Eat Meat project and share their approach on how to:

- Determine who your consumer is
- Define your consumer and obtain corporate support of that definition
- Become intimate with the consumer
- Redefine your brand to meet consumer's image
- Modify the delivery of all aspects of the Ball Park experience to the consumer
- Involve cross-functional groups corporatewide throughout the process
- Initiate projects to delve deeply into the consumer space to define new products

Wednesday, November 10
10:30 am

Panel Discussion:
If I Had Only Known "X" Before I Started VOC

*MODERATOR: **Gerry Katz**,*
                Applied Marketing Science
PANELISTS: Conference Faculty

Find out how our expert faculty members have dealt with bumps in the road—those little hurdles and unexpected roadblocks that crop up while engaging in VOC efforts. Hear how they avoided common pitfalls and learn what to do (or at least what not to do) in uncommon scenarios. Come prepared with your own questions for the panel on VOC topics ranging from customer data gathering to analyzing and interpreting your results and how to gain cross-functional support.

Wednesday, November 10
7:00 – 8:00 am

Breakfast Roundtable:
Emerging VOC Tools

Join robust discussions on the benefits and shortcomings of the latest tools available to keep a pulse on what your customers really want.

Networking Opportunities:

The program provides multiple opportunities for you to connect one-on-one with conference faculty and your colleagues from other firms. You'll have no trouble gaining advice and answers to your individual questions—you'll come away with new approaches and tools that your entire cross-functional team can deploy.

8

Take this quick self-diagnostic to identify and evaluate your team's strengths and weaknesses in using VOC. Rate each question: 1 = always, 2 = sometimes, 3 = never. Scoring is below.

1. Do your marketing and engineering people come to agreement over requirements and specs quickly?
   1 ☐   2 ☐   3 ☐

2. Do you know which customers are the "right" ones to interview?
   1 ☐   2 ☐   3 ☐

3. Do you know how many customer interviews are necessary for an accurate reading of needs?
   1 ☐   2 ☐   3 ☐

4. Are your VOC techniques getting at customers' unspoken needs?
   1 ☐   2 ☐   3 ☐

5. Do you vary your research methods to fit the situation (i.e., interviews, observation, virtual customer methods, etc.)?
   1 ☐   2 ☐   3 ☐

6. Do you separate "must have" features from "nice to have" features for your products?
   1 ☐   2 ☐   3 ☐

7. Do you know how and when to integrate VOC data into your development process?
   1 ☐   2 ☐   3 ☐

8. Does senior management support your VOC research and decisions?
   1 ☐   2 ☐   3 ☐

9. Do you interview non-customers, past customers and others besides your biggest and best customers?
   1 ☐   2 ☐   3 ☐

10. Does your team clearly distinguish between "needs" and "solutions to needs"?
    1 ☐   2 ☐   3 ☐

SCORING: Give yourself 1 point for each "always," 2 points for each "sometimes" and 3 points for each "never." Add up your total.

10-14: Excellent—your team is experienced and ready to use new, sophisticated techniques to leapfrog competitors

15-19: Good—your team has a basic understanding of VOC, but there are clearly gaps in your process

20-30: Your team needs help in VOC. With some training and coaching, your company will see far better results!

Whether your process is beginner or experienced, **Taking VOC to the Next Level** is designed to do just that. The conference includes a range of sessions, from skill-building workshops to advanced case studies, with guidance from top VOC leaders to take your process and skills to the next level. Whether your score was 10 or 30, you will come away with new insights guaranteed to boost your ultimate score - your company's bottom line.

MORNING SESSIONS   8:00 – 12:00

A How to Interview Customers: Skills, Tools and Secret Success Tips

Gerry Katz, *Executive Vice President, Applied Marketing Science, Inc.*

Even with the best training and coaching, most product development teams report that the interviewing process itself remains one of the hardest skills to acquire, master, and maintain. Strangely enough, for most product developers, talking to customers about their wants and needs continues to feel like an uncomfortable, unnatural act!

Whether you conduct your interviews individually or in groups, at the customer's location or elsewhere, ethno-graphically or with direct questioning, there is a right way and a wrong way to conduct Voice of the Customer interviews. The right way produces dozens of rich, insightful wants and needs, detailed enough to result in an innovative new product or service. This workshop will focus exclusively on interviewing skills, and will include detailed instruction on:

• How to introduce and frame your interview
• How to put the customer at ease
• How to organize your questions
• How (and how not) to ask them
• How to probe to get beyond the initial response
• How to draw out the unspoken needs

By incorporating practice sessions, role-playing, and videotaped critiquing of participants, in a lively, fun-filled half-day format, this workshop will provide partic-ipants with:

• A set of replicable interviewing skills consistent with each participant's own style
• A clear understanding of, and the ability to, recognize the distinction between needs and solutions
• A heightened sense of confidence in speaking with and interviewing customers
• A way to draw customers out and get them to articulate their real underlying (and often unspoken) needs
• A set of skills that can easily be shared with other colleagues

GERRY KATZ *is a recognized authority in the areas of new product development, design of new services, and market research, with 30 years of consulting experience. At Applied Marketing Science he has led more than 100 major client engagements employing the Voice of the Customer, QFD, and a large number of other marketing science applications. He serves on the board of directors of the Product Development & Management Association (PDMA) and is a certified New Product Development Professional.*

B Capturing the White Space with Ethnographic Tools

Jerry McColgin, *Vice President, Strategy & Consulting, Venture2, Inc.*

This interactive half-day workshop will provide you with tools and techniques for surfacing unmet, unspoken con-sumer needs and developing high-potential, innovative product/service solutions. Understanding the potential applications of ethnography will help you generate ideas ranging from product extensions to new features to cap-turing valuable "white space" within your industry. This workshop will specifically address:

IMPORTANCE…
• Understanding ethnography and contextual inquiry
• Surfacing unmet needs that consumers can't readily express
• When to use these tools and when not to
• Benefits and drawbacks compared with other types of research

EXECUTION…
• Evolving from product-focused research to consumer process research
• Methodologies
  – Understand project scoping—where to start, what to watch, timing
  – Who and how many observations—customers and non-customers
  – Successful interviewing techniques (and traps to avoid)
  – Filming, photographing and editing strategies
  – Importance of cross-functional, multiple perspective participation and review sessions

APPLICATION…
• Creating consumer insights
• Focused idea generation
• Biggest mistakes
• Techniques for using research findings for "selling" breakthrough concepts within your organization
• Long-term benefits of data-basing clips

JERRY McCOLGIN *is an accomplished leader and recognized new product development expert with over 20 years of experience in both corporate consulting and corporate roles. Prior to becoming a founding member of Venture2, Inc., he spent six years as president of McColgin Consulting, helping a variety of companies including Whirlpool, Sunbeam, AOL-Time Warner, Murray, Evenflo and Abbott Laboratories create high-perform-ance teams focused on surfacing unmet consumer needs and generating break through new product ideas. Jerry has an engineering degree from Purdue University, an Executive MBA from Ashland University and holds seven US patents.*

9

AFTERNOON SESSIONS   1:00 – 5:00

C *Beyond Quantitative Research: Integrating VOC for Less 'Ho-Hum' and More 'Wow'*

Sheila Mello, *Managing Partner,*
Product Development Consulting, Inc.

Companies often cite poor product definition (what the product or service must provide) as one of the leading contributors to a product's disappointing marketplace performance. This is due, in part, to the inherent difficulty in managing the product definition process. Organizations must clearly identify customer requirements in order to direct and stimulate design innovation. However, more times than not market documents contain generic features rather than specific requirements. The products that result often lack qualities that truly capture or motivate the customer.

BY PARTICIPATING IN THIS SESSION, YOU WILL LEARN HOW TO:
• Make descriptive customer data useful for engineers and others involved in all stages of product development, from concept development to full-scale production
• De-emphasize internal agendas within the realm of product development decision making
• Conduct in-depth, ethnographic research
• Formulate interview guides
• Do customer interviews in a manner that elicits insights about the customers' world that is the key to developing innovative new products
• Synthesize information and draw conclusions about the target customers' environment
• Translate customer "desires" into measurable customer requirements
• Reach consensus on the key customer requirements

SHEILA MELLO *is the managing partner of Product Development Consulting, Inc., based in Boston, Massachusetts, and author of* Customer-centric Product Definition—The Key to Great Product Development. *Her executive management experience encompasses a range of functions in various industries, including product development, quality, engineering, marketing, software, operations, service and sales. In her consulting work with PDC, Ms. Mello has been instrumental in leading cross-functional team implementations, the use of unique and effective methods in product definition and strategy, and product development process improvements. She holds a BS (magna cum laude) in mathematics from Tufts University and is a member of the Product Development Management Association, American Marketing Association, and the Institute of Electrical and Electronics Engineers.*

D *Must-Have or Nice-to-Have? Using Conjoint Analysis to Measure and Decide*

Brian Ottum, *President,*
Ottum Research & Consulting

Going out and hearing the 'voice of the customer' is often easy. The hard part is separating out the 'nice to haves' from the 'must haves.' Companies need a succinct ranking of what is most important to customers. Conjoint analysis is an excellent tool for this.

Conjoint analysis is a sophisticated tool for uncovering the realistic importance of product and service features, as well as price sensitivity. Conjoint is much more accurate than old-fashioned direct questioning because it more closely mirrors actual purchase decisions.

This workshop will cover the basics of conjoint analysis: a little theory and a lot of examples. Attendees will gain an understanding of where they can use conjoint in their own projects and what results they can expect.

KEY TAKE-AWAYS:
• A working definition of conjoint analysis
• When to use (and when not use) conjoint analysis
• What you can expect from the results of conjoint analysis
• A clear understanding of the difference between conjoint and discrete choice
• Assumptions and limitations of conjoint analysis
• Pros and cons of available software tools

BRIAN D. OTTUM *is president of Ottum Research & Consulting in Saline, Michigan. His practice is focused on new product development consulting and innovative market research tools. Ottum Research & Consulting serves clients in the packaged goods, durables, and high technology industries. Prior to starting his own firm, Brian worked in new product development and international market research for Procter & Gamble. He holds a Ph.D. from the University of Utah, an MBA from Xavier University, and a BS in chemical engineering from the University of Wisconsin. Brian also teaches new product development classes at conferences and at the University of Michigan.*

"Great exposure to experts and world-class best practices techniques that make product development from idea through launch more objective/successful."
Bill Villars, S.C. Johnson

10

CONFERENCE INFORMATION / REGISTRATION

Taking VOC to the Next Level:
Define, Differentiate, Disrupt

November 8 – 10, 2004   **Boston**

4 WAYS TO REGISTER:

Call:	**1-800-338-2223 or 781-891-8080** (weekdays, 9:00am–5:30pm EST)
Fax to:	**781-398-1889**
Internet:	**www.ManagementRoundtable.com**
Mail to:	**VOC Conference** c/o Management Roundtable 92 Crescent Street, Waltham MA 02453

Alumni & Subscriber Discounts:
If you've previously attended a Management Roundtable conference or are a current subscriber to Product Development Best Practices Report, you qualify for our $100 Alumni Discount. To receive this discount when using our on-line registration form, put a check in the special box beneath the priority code field (subject to offline verification).

Team Discounts:
Groups of 3 or more may deduct $100 per person. Groups of 6 or more, please call 800-338-2223 for special pricing.

Dates:
The 2-day conference will begin at 8:00am (registration and continental breakfast at 7:00am) on Tuesday, November 9, 2004 and will adjourn at 4:00pm on Wednesday, November 10, 2004. Optional pre-conference workshops are offered on November 8th from 8:00am – 5:00pm.

Program Fee:
Fee includes materials, luncheons, receptions, continental breakfasts and refreshment breaks.

Location & Hotel Accommodations:
The conference will be held at the **Hilton Boston Back Bay,** 40 Dalton Street, Boston, MA 02115. Please call 617.236.1100 directly for room reservations and be sure to mention that you will be attending the Management Roundtable "Voice of the Customer" conference. A limited block of rooms are available.

No-Risk Guarantee:
Your satisfaction is 100% guaranteed—money-back or credit. If you're not satisfied with the quality of this program, let us know in writing and we'll refund your registration fee.

Cancellations/Substitutions:
You may send a substitute attendee in your place at any time with no penalty (please inform us in advance, if possible). Cancellations made within 5 business days are subject to a $200 administration fee or the full fee can be credited towards a future purchase. No-shows are liable for the full fee.

Conference Attire: Business casual.

Please accept the following registration(s):
(Please use photocopies for additional people)

NAME Mr. / Ms._____

TITLE _____

COMPANY _____

DIVISION/DEPT. _____

ADDRESS_____

_____

CITY/STATE/ZIP_____ COUNTRY_____

PHONE_____ FAX _____

EMAIL _____

☐ I cannot attend; please send me _____ conference handbooks with case studies, data, all handouts and more, at $395 each (to be shipped within 3 weeks after the event).

☐ Please send me information about sponsorship/exhibitor opportunities.

Please select your conference/workshop package:

	Before 8/31	After 8/31
☐ 2-day conference only	$1395	$1695
☐ 2-day conference + 1 half-day pre-conference workshop	$1890	$2190
☐ COMPLETE PACKAGE: 2-day conference + 2 half-day pre-conference workshops	$2385	$2685
☐ 1 half-day pre-conference workshop (stand-alone)	$695	$695
☐ 2 half-day pre-conference workshop (stand-alone)	$1390	$1390

Please select the pre-conference workshop(s) you plan to attend (if any):

☐ **A.** How to Interview Customers: Skills, Tools and Secret Success Tips   (half-day AM)

☐ **B.** Capturing the White Space with Ethnographic Tool   (half-day AM)

☐ **C.** Beyond Quantitative Research: Integrating VOC for Less 'Ho-Hum' and More 'Wow'   (half-day PM)

☐ **D.** Must-Have or Nice-to-Have? Using Conjoint Analysis to Measure and Decide   (half-day PM)

Payment Information

☐ Check enclosed, payable in US funds to Management Roundtable.

☐ Please bill my   ☐ VISA   ☐ Mastercard   ☐ AMEX   ☐ Diner's Club

CARD NO._____ EXP. DATE: _____

NAME AS IT APPEARS ON CARD: _____

SIGNATURE_____

☐ Please bill my company. PO# _____

Code: Webdownload

Taking VOC to the Next Level:
Define, Differentiate, Disrupt

November 8 – 10, 2004   **Boston**

Gain an accurate read on what your customers really want — learn what VOC methods, tools and processes are working (and which are not).

Analyze, interpret and prioritize your customers' voice and exceed customer expectations.

Engage a cross-functional team at the onset and successfully translate customer desires into measurable customer requirements.

Go beyond VOC — find out how to anticipate trends and unspoken customer wants to create the next killer product.

The Management Roundtable
92 Crescent Street
Waltham MA 02453