

Customer Insights & Experiences Included the control of the contr

Welcome to Customer Insights & Experiences!

This course will focus on those concepts essential to gaining insights into our customers' behaviors, decision points and actions, translating insights into understandable and usable conclusions, and designing programs that truly respond to a customer-driven world.



The total customer experience ...

has become paramount in an economy where only those companies that react to and anticipate their customers' deeper needs and desires will survive and thrive. The right tools, processes, and philosophies are essential to the development of holistic marketing analysis, design, and communication programs. Ultimately, creativity and innovation need to be explored and unleashed to generate new ideas and concepts to address customer needs in a way that cultivates meaningful relationships and creates true value.

Spring 2011

A human-centered approach to design...

presents the opportunity to create products, services, and programs that can have a significant impact on our communities. We will strive to recognize that the tools and skills we use to create profitable enterprises can also create real social change

Course Details, Objectives, & Approach

Course, Time	MKT 382-05085; MW 3:30 - 5:00 PM		
Classroom	UTC 1.104		
Office, Hours	GSB 4.126K; Tuesdays 1:30 - 3:30, please make an appointment when possible		
Instructor & TA	Stephen Walls, Ph.D.		
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Primary Course Objectives

- •Understand the concepts and general paradigms of customer insights and experiences within the role of the marketing function and within the organization overall.
- •Understand how a design philosophy can be integrated into our efforts to gain insights and create valuable experiences for customers.
- Understand the broad product/service/program development steps, including gaining meaningful insights, evaluating customer insights, and creating products & services that are truly valuable to customers
- Consider how we can make our communities & society better through our work
- •Improve presentation and writing skills

Course Approach

To start with, it is important for you to understand customer insights and experiences terminology, concepts, & activities.

- The first step in accomplishing this will be for you to read the assigned readings by the dates outlined in the schedule.
- In addition, our class discussions will reinforce key concepts.

Reading the articles & chapters and attending class are, however, only the first step. To really understand this material, you must also apply it. To accomplish this, we will also have:

- A semester-long group project to apply all the principles we cover in class
- Class discussions & activities
- Writing assignments to reflect on deeper connections between course concepts and the world-at-large

Class Resources

- 1. Course Readings (available on Blackboard)
- 2. Lecture Slides & Course Assignments (available on Blackboard)



A few of my thoughts on teaching...

My goal is to provide tools and create an environment for learning. I believe my responsibility as an

instructor is to ensure that this class contributes to the overall return on your investment by providing a worthwhile set of tools and resources and doing my best to demonstrate how interesting and important this topic can be to you and the world-at-large.

Since you all learn in different ways, your responsibility is to take advantage of all the resources provided in all the ways that are best for you. I expect you to be very active in your learning, rather than sitting on the sidelines as a passive observer. I have created a fairly specific structure to this course, but will maintain flexibility so that we can adapt to the needs and desires of those participating.

Throughout this course I am trying to encourage you to read the material from the resources provided, critically think about how they apply to a variety of marketing circumstances, make connections to concepts larger than marketing, and consider how you will make the world a better place through your work.



Class Participation

You are all bright people who learn in different ways. Because you all come from a variety of experiences and backgrounds, I am hoping that each of you will contribute greatly to the knowledge built in this class by sharing your thoughts. Come prepared to engage in the discussions, whether you actually speak out loud or not, by not just reading the required cases and chapters, but by also forming opinions and questions about the material presented. I will call upon you from time to time, but these will not be attempts to harass or embarrass you, I promise. I simply want to give everyone more experience in being prepared to speak on the spot about various topics. You can read details below of how class participation will be evaluated.



Communication

Communication is a key skill for anyone involved in any aspect of marketing, not to mention almost every other aspect of business. Communicating effectively includes the ability to organize your thoughts coherently and use language accurately so that the story is told in the best way possible. Although your assignments will be evaluated primarily on the basis of effort and content, you will also be evaluated on your ability to communicate effectively. This will apply to both written and oral presentations of your work.



Contacting Me

There is just no substitute for attending class to get all of the information you need - I do not send every instruction via email.

Please use email VERY sparingly - just talk to me before or after class or during office hours. Do not email assignments to me unless you've checked with me first, as they tend to get lost in the shuffle of my inbox. Never use email to discuss grades, express concerns, launch into passionate diatribes, or anything similar. Instead, set up time with me to discuss these things in person.

Also, I am really bad about checking my office voicemail, so if you have a true emergency, it is definitely best to call my mobile phone.

Grading & Assignments

Online Journal (5 highest graded entries; 0-4 points each)	20 points
Current Topic Extended Outline	10 points
Current Topic Final Report	20 points
Experience Audit & Prototype Updates (4; 5 points each)	20 points
Experience Audit & Prototype Final Presentation	20 points
Participation	10 points

Total 100 points

Grades will follow plus/minus system with the following cut-offs. 100-93=A, 92-90=A-, 89-87=B+, 86-83=B, 82-80=B-, 79-77=C+, 76-73=C, 72-70=C-, 69-67=D+, 66-63=D, 62-60=D-, and 59 or lower=F. Note: I will <u>not</u> round up - an 89.99 (as close as it is to 90) will still be a B+. I assume all assignments will be turned in on time and will penalize late assignments at my discretion (i.e. I will consider valid, documented reasons, but I will significantly penalize your grade if the lateness is unwarranted, including computer, printer, relationship, and transportation issues, just to name a few).

Online Journal - Customer Insights & Experiences Blog

Goal: Explore your own personal awareness, attitudes, and feelings towards customer experiences so that you may better understand and articulate other people's awareness, attitudes, and feelings.

At the beginning of the session, you will create an online journal (or blog). General instructions on which blog site to use as well as tips to make it easier will be provided. For the early entries, I will assign topics for you to consider in your journal. These topics will come in the form of discussion questions, mini-assignments, or something similar. For later entries, I will generally ask you to pick out those things in the "world of customer insights and experiences" that grab you — an ad that captures your attention, an article that is insightful, a product or service that is wildly innovative, an encounter that reinforces (or doesn't) a brand identity, etc.. Use your online journal to write your comments on why it captures your attention and any thoughts that you have about it. In addition, you can provide pictures or links so that we can get a better sense of what you are talking about.

The total number of journal entries, including your personal choices plus the ones I assign, is **6 entries**. Generally, the entries will be due a week from the date they are assigned (typically by the time class begins on the day they are due). The presentation of this assignment should reflect your style while facilitating your ability to document those things I've described above. In addition to what I've provided above, some criteria I use in determining effort are length of the entry (somewhere around I page, single-spaced typed in a Word document using Times New Roman, I2-point font is a good minimum guideline), use of class concepts & discussions, comparisons (convergent & divergent) to in-class or reading examples, and creativity (your own personal examples). Above all, demonstrate your ability to synthesize all of this stuff and express your opinion!

Typically, the scoring for each entry will work like this:

0 points - Did not even attempt the assignment or made an extremely weak and insignificant attempt

I point - Attempted the assignment with at least an acceptable amount of effort

2 points - Reached the minimum required length (see above) and appropriately addressed the topic

3rd & 4th points - Either included connections to class concepts (1 point) and/or provided personal examples or exhibited some other creativity in thought (1 point)

Customer Experience Audit & Prototype

Goal: Work with a team on an insight and experience simulation, utilizing and exploring concepts discussed in class.

As a team, you should assume that you are the Customer Insights team at a major company. or a group of budding entrepreneurs. You have been tasked (or tasked yourselves) with identifying the next big opportunity and developing a completely new product or service that is part of an overall larger experience, which is ultimately designed to create value for a specific, targeted set of people. Additionally, you should consider how your idea will make the world a better place (at least for your target customers) and will not just be more "stuff" for them to purchase and consume.

Throughout the project, your presentations should be thorough and professional, utilizing the various concepts we are covering in the course. More details will be made available on the Assignments section of our Blackboard site as we approach each phase.

For each of the first three phases of the project, you are required to develop a 5-page maximum slide presentation and discuss your progress during each one of the assigned sessions for that phase.

Phase I – Identify an Opportunity (Complete by 2-Feb)

Using a research database, your team will identify opportunities within a specific context that will guide the remaining phases of the project. You will be using secondary research as a tool to understand where market opportunities might exist for new products, services, and overall experiences.

Phase 2 - Customer Persona & Current Experience (Complete by 9-Feb, but will continue to evolve)

Select and describe the persona you would like to analyze and for which you would like to design a new product or service. Keep in mind that the description should be as detailed as possible, showing a deep understanding of who they are as people or organizations. Understand that your target customer persona may also evolve over the project.

Phase 3 – Design Research Study & Gain Insights (Complete Study Design by 23-Feb, Gaining Insight by 21-Mar) Using generative/ethnographic techniques discussed in class, gather insights about your persona and the experiences associated with your context. By this point, you should have developed ideas or theories about your persona and their underlying needs or desires. Your data collection should help validate, refine, and guide the next steps of your project.

Phase 4 – Evaluate Insights & Identify the Problem Statement (Complete by 30-Mar; include in Phase 5 Update) Using a framework of your choice or design, conduct an in-depth analysis of the insight you gathered. Basically, you'll be attempting to organize all of your findings. The evaluation should focus on interesting findings and clearly articulate conclusions you have begun to make. Ultimately, you will need to create a problem statement that will be the guiding force behind the development of your product, service, and experience ideas.

Phase 5 – Develop Product/Service Ideas & Create Rough Prototypes (Complete by 4-Apr) Identify several potential product or service ideas and create rough, rapid prototypes to represent each. You will take your rapid prototypes back out to your research participants to gather their feedback and refine your ideas.

Phase 6 – Final Product/Service & Prototype Presentation (Complete by 25-Apr)

Based on the feedback you receive from your persona, refine your product or service idea and develop a final physical prototype that represents your idea. Make the prototype as realistic as possible, considering colors, textures, features, etc. In presenting the prototype, you should consider and include information that is relevant from the previous phases of your project as well as any additional information that will help sell us on your idea. For the final phase of the project, you are required to consolidate your earlier presentation into one coherent and cohesive final presentation, including the addition of information associated with your final product or service prototype development.

Note: While this is a group grade, peer reviews can significantly affect your final individual score on this project.

Current Topic Report

Goal: Explore a customer insight issue or case study in which you have a strong interest so that the course topics become more personally relevant.

You all come to this class with different backgrounds, interests, and expectations. It is important that you get something you really want to learn out of this class, so this contracted paper/project is your opportunity to tailor the class to your interests. You can write a case study, using the topics and concepts discussed in class to analyze the current situation and make recommendations about interventions. Alternatively, you can identify an area of research related to customer insights or experiences that seems particularly important for your professional use and write an analysis paper summarizing the available literature (academic and trade/industry) and making predictions or recommendations for the future.

The final product of this activity will be a **10-12 page paper** (double-spaced, one-inch margins). It will be evaluated on the basis of thoroughness, originality or insightfulness, and clarity of writing. You will be required to submit a 3-4 page (single-spaced, one-inch margins) extended outline, including resources, earlier in the semester to assist your progress.

Class Participation & Attendance

Answer questions, pose questions, provide insightful observations. Keep in mind that quality is an important component of this. Periodic cold calls also count here. Reading the assigned chapters and articles are the best way to prepare for the discussion.

Each class, you will receive a participation score from 0-3, based on the quality of your participation during that class. One point will be awarded for attending class that day. The second and third point will be awarded based on your quality of contribution that day. At the end of the session, the participation scores will be averaged across the entire class. If your total score is equal to or greater than the class average, then you will receive 10 points (or 10% of your total class grade). If your total score is below the class average, then you will receive between 0-9 points, based on the distribution of points across the class participation scores below the class average.

Note that if you arrive more than 10 minutes late to class or leave more than 10 minutes early, you will not receive the I point for attendance. Additionally, if tardiness becomes a chronic problem (e.g., consistently showing up 3-5 minutes late for class), then I will consider more penalties because of the disruption.

Academic Integrity

Don't cheat. Integrity is important in the "real world" and the classroom alike. The bottom line is that I will not be tolerant of any unethical behavior in any way shape or form and will seek out the maximum penalties for any student violating the University's policies. Please read the "University Policies" section below for more details and links to the official policy.

Students are often confused about academic dishonesty when it comes to projects/papers. The most common confusion is with plagiarism. The basic rule to avoid plagiarism is to simply cite your sources: If it's not your idea, then cite the source. You can use APA style (or any other style) to cite references as long as you are consistent. Try this link for details about APA style: http://www.lib.utexas.edu/students/citing/online/apa.html

Plagiarism. n 1: a piece of writing that has been copied from someone else and is presented as being your own work 2: the act of plagiarizing; taking someone's words or ideas as if they were your own, WordNet 2.0 (2003), Princeton University, from www.dictionary.com.

University Policies

The McCombs School of Business has no tolerance for acts of scholastic dishonesty. The responsibilities of both students and faculty with regard to scholastic dishonesty are described in detail in the Policy Statement on Scholastic Dishonesty for the McCombs School of Business:

By teaching this course, I have agreed to observe all of the faculty responsibilities described in that document. By enrolling in this class, you have agreed to observe all of the student responsibilities described in that document. If the application of that Policy Statement to this class and its assignments is unclear in any way, it is your responsibility to ask me for clarification. Policy on Scholastic Dishonesty: Students who violate University rules on scholastic dishonesty are subject to disciplinary penalties, including the possibility of failure in the course an/or dismissal from the University. Since dishonesty harms the individual, all students, and the integrity of the University, policies on scholastic dishonesty will be strictly enforced. You should refer to the Student Judicial Services website at http://deanofstudents.utexas.edu/sjs/ or the General Information Catalog to access the official University policies and procedures on scholastic dishonesty as well as further elaboration on what constitutes scholastic dishonesty.

Password-protected class sites will be available for all accredited courses taught at The University. Syllabi, handouts, assignments and other resources are types of information that may be available within these sites. Site activities could include exchanging email, engaging in class discussions and chats, and exchanging files. In addition, class e-mail rosters will be a component of the sites. Students who do not want their names included in these electronic class rosters must restrict their directory information in the Office of the Registrar, Main Building, Room 1. For information on restricting directory information see: http://www.utexas.edu/student/registrar/catalogs/gi02-03/app/appc09.html.

The University of Texas at Austin provides upon request appropriate academic accommodations for qualified students with disabilities. For more information, contact the Office of the Dean of Students at 471-6259, 471-4641 TTY.

Tentative Course Schedule

Session	Date	Day	Topic	Readings/Deadlines
1	19-Jan	Wed	Course Overview	Mintel Database
2	24-Jan	Mon	Impact of Insights	"Insights Into Customer Insights" "From Major to Minor" Economist Submit Team Selection via email by midnight 24-Jan
3	26-Jan	Wed	Impact of Design	"IDEO HCD Toolkit" IDEO "Get Creative" BusinessWeek
4 Blog 1	31-Jan	Mon	Developing a Customer Persona	The Persona Lifecycle (Ch. 2), Pruitt & Adlin Cohorts Vignettes
5	2-Feb	Wed	Project Work Session Persona & Current Experience	Submit Selected Opportunity via Bb by midnight 2-Feb
6 Blog 2	7-Feb	Mon	Customer Experiences Case Study & Framework	"True Colors" Gladwell "A Framework for Managing Customer Experiences" Schmitt
7	9-Feb	Wed	Project Update Persona & Current Experience	Submit Persona & Current Experience Update via Bb by 3:30 p.m. 9-Feb
8	14-Feb	Mon	Qualitative Research Design	"Thoughtless Acts? Observations on Intuitive Design" Suri + IDEO Blink - "Kenna's Dilemma" Gladwell "Turn Customer Input Into Innovation" Ulwick "Metaphorically Speaking" Zaltman
9	16-Feb	Wed	Project Work Session Research Study Design	
10 Blog 3	21-Feb	Mon	Behavioral Economics	"Peer Pressure and Other Pitches" WSJ Predictably Irrational - "The Effects of Expectations" Ariely "Food Firms Cook Up Ways to Combat Rare Sales Slump" WSJ
11	23-Feb	Wed	Project Update Research Study Design	Submit Research Study Design Update via Bb by 3:30 p.m. 23-Feb
12	28-Feb	Mon	Process Mapping	
13	2-Mar	Wed	Evaluating Insights	"Get the Job Done" Wunker
			Project Research & Spring Break	

Session	Date	Day	Торіс	Readings/Deadlines
14	21-Mar	Mon	Creativity & Innovation	"The New, Faster Face of Innovation" Brynjolfsson & Schrage "The Global Innovation 1000: How the Top Innovators Keep Winning" Jaruzelski & Dehoff "The Genius of the Tinkerer" Johonson
15 Blog 4	23-Mar	Wed	Gaining Insights Using Technology	Consumer Insight - Introduction & Chapter 5, Stone, Bond, & Foss "RFID Ready for Item-Level Use" "What Walmart Knows about Customers' Habits" Hays
16	28-Mar	Mon	Prototyping Within the Innovation Process	"Prototyping is the Shorthand of Design" Kelley Extended Outlines Due as Paper Copy by 3:30 pm
17	30-Mar	Wed	Project Work Session Prototyping	
18	4-Apr	Mon	Project Update Evaluating Insights & Problem Statement; Product Ideas / Rough Prototypes	All Rapid Prototypes Due in Class & Updates Due via Bb by 3:30 pm
19	6-Apr	Wed	Project Update Evaluating Insights & Problem Statement; Product Ideas / Rough Prototypes	
20 Blog 5	11-Apr	Mon	Limits of Data & Ethical Considerations	"A Web Pioneer Profiles Users by Name" Steel "Sites Feed Personal Details to New Tracking Industry" Angwin & McGinty
21	13-Apr	Wed	Social Media - Gaining Insights	Groundswell - Chapter 2, Li & Bernoff "Facebook Sells Your Friends" Stone "Marketers Watch as Friends Interact Online" Steel
22	18-Apr	Mon	Social Media - Creating Experiences	Groundswell - Chapter 3, Li & Bernoff "Off=On" trendwatching.com "Gatorade's Mission: Sell More Drinks" Bauerlein Final Papers Due via Bb SafeAssign by Midnight
23	20-Apr	Wed	Organizing Around the Customer	"Customer Voice Program" Forrester Research
24-26	25-Apr - 2-May	Mon Wed Mon	Presentations	All Prototypes Due in Class & Presentations Due via Bb by 3:30 pm
27	4-May	Wed	Wrap-Up & Final Thoughts	
Blog 6				

Syllabus Acknowledgement Customer Insights & Experiences - Spring 2011

course and how my performance will be e resources, grade distribution across assign team project assignments, class attendance	, acknowledge that I have received the syllabus for stand its contents. Specifically, I understand the objectives for this valuated. I also understand the policies associated with class ments, determination of the final letter grade, individual assignments & participation, and academic integrity. I also understand that I ssistant as soon as possible with any questions or issues regarding
Signature	Date