Customer Insights & Experiences

Fall 2010

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.

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 372-05050; M W F 3:00 - 4:00 PM
Classroom	UTC 1.116
Office, Hours	GSB 4.126K; M W F 2:00 - 3:00, please make an appointment when possible
Instructor & TA	Stephen Walls, Ph.D. / Jangho Moon
e-mail	stephen.walls@mccombs.utexas.edu / unpluggedsoul@gmail.com
Phone	m:512.422.1918 o:512.232.5985

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.
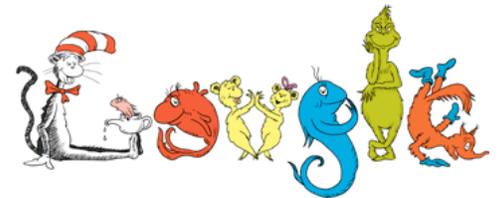
Class Participation

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 (3; 5 points each)	*15 points*
Experience Audit & Prototype Final Presentation	*25 points*
Participation	*10 points*
Total	**100 points**

Grades will follow plus/minus system with the following cut-offs. 100-92=A, 91-90=A-, 89-88=B+, 87-82=B, 81-80=B-, 79-78=C+, 77-72=C, 71-70=C-, 69-68=D+, 67-62=D, 61-60=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 is **6 entries**. Generally, the entries will be due by the beginning of class a week from the date they are assigned. 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 1 page, single-spaced typed in a Word document using Times New Roman, 12-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
 1 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 entrepreneurs who have formed a professional organization and are consulting with a company that is interested in developing a totally new product/service and overall experience. More information on the actual company and project will be provided later.

Your overall goal should be to create a product or service that connects with an experience as desired by a specific, targeted set of people. You should also 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 1 - Customer Persona & Current Experience
Determine and describe the segment that you would like to analyze and for which you would like to design a new product or service. You will be developing a full "persona" of the segment, which means that the description should be as detailed as possible, showing a deep understanding of demographic, psychological, social, behavioral, and needs characteristics. Understand that your segmentation decision may also evolve over the life of the project. This first attempt should reflect your best effort at developing a rich picture of who you would like to target. Also, begin focusing in on aspects of the experiences that are most interesting to your group. Using class concepts, develop a framework for describing the current associations with these experiences. Keep in mind that the experience should be captured through the lens of your target customer.

Phase 2 – Design Research Study & Gain Insights
Using observation/ethnographic techniques discussed in class (we can discuss another alternative if observation just isn't possible for your project), gather insights about your segment and the experiences associated with them. By this point, you should have developed ideas or theories about your target and their underlying needs or desires. Your data collection should help validate, refine, and guide the next steps of your project.

Phase 3 – Evaluate Insights, Develop Product/Service Ideas, and Create Rough Prototypes
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. Identify several potential product or service ideas and create rough, rapid prototypes to represent each.

Phase 4 – Final Product/Service & Prototype Presentation
Based on the feedback you receive from your target customers, 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 first 3 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. You will have 20 minutes to make your final presentation.

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 **7-8 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 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 1 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 e-mail, 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
1	25-Aug	Wed	Course Overview
2	27-Aug	Fri	Impact of Insights
3	30-Aug	Mon	Impact of Design & Designing for Impact
4	1-Sep	Wed	Project Overview
5	3-Sep	Fri	Developing a Customer Persona
	6-Sep	Mon	Holiday
6	8-Sep	Wed	Project Work Session Persona & Current Experience
7	10-Sep	Fri	Project Experience Session Persona & Current Experience
8	13-Sep	Mon	Customer Experiences Case Study
9	15-Sep	Wed	Customer Experiences Framework
10	17-Sep	Fri	Project Update Persona & Current Experience
11	20-Sep	Mon	Project Update Persona & Current Experience
12	22-Sep	Wed	Qualitative Research Design
13	24-Sep	Fri	Qualitative Research Design Experience Session

Session	Date	Day	Topic
14	27-Sep	Mon	Qualitative Research Design Experience Reports
15	29-Sep	Wed	Project Work Session Research Study Design
16	1-Oct	Fri	Behavioral Economics
17	4-Oct	Mon	Behavioral Economics
18	6-Oct	Wed	Project Update Research Study Design
19	8-Oct	Fri	Project Update Research Study Design
20	11-Oct	Mon	Process Mapping Experience Session
21	13-Oct	Wed	Process Mapping Reports
22	15-Oct	Fri	Evaluating Insights
23	18-Oct	Mon	Evaluating Insights
24	20-Oct	Wed	Project Work Session Evaluating Insights
25	22-Oct	Fri	Project Work Session Evaluating Insights
26	25-Oct	Mon	Creativity & Innovation
27	27-Oct	Wed	Creativity & Innovation Experience Session
28	29-Oct	Fri	Creativity & Innovation Experience Session

Session	Date	Day	Topic
29	1-Nov	Mon	Prototyping ***Extended Outlines Due***
30	3-Nov	Wed	Project Work Session Rapid Prototyping
31	5-Nov	Fri	Project Work Session Rapid Prototyping
32	8-Nov	Mon	Gaining Insights Using Technology
33	10-Nov	Wed	Social Media - Gaining Insights
34	12-Nov	Fri	Social Media - Creating Experiences
35	15-Nov	Mon	Limits of Data & Ethical Considerations
36	17-Nov	Wed	Organizing Around the Customer
37	19-Nov	Fri	Wrap-Up & Final Thoughts ***Final Papers Due***
38	22-Nov	Mon	Project Work Session Final Presentation Preparation
	24-Nov	Wed	Group Workday
	26-Nov	Fri	Holiday
39	29-Nov	Mon	Final Presentations
40	1-Dec	Wed	Final Presentations
41	3-Dec	Fri	Final Presentations