Customer-Inspired Design: Applying Voice of the Customer to Improve New Product Success Rates

July 19, 2003

Pittiglio Rabin Todd & McGrath
Workshop objectives

- Understand key best practices in customer needs acquisition and requirements definition and how to structure a Voice of the Customer (VoC) project

- Review VoC techniques and their use in gathering needs and converting them into requirements for a project

- Conduct a brief workshop to practice selected tools and techniques
## Today’s agenda

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<tr>
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<th>Introduction</th>
<th>Start Time</th>
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<tr>
<td>1</td>
<td>Using the “Voice of the Customer” to drive successful new products</td>
<td>9:30 a.m.</td>
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<td>2</td>
<td>Principles of PRTM’s VoC</td>
<td>9:40 a.m.</td>
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<td>3</td>
<td>“Redesigning Product Development*” (L.L. Bean Using VoC techniques)</td>
<td>10:10 a.m.</td>
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<td>4</td>
<td>VoC Workshop</td>
<td>10:45 a.m.</td>
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<td>5</td>
<td>Additional resources</td>
<td>12:15 a.m.</td>
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Introduction

PRTM is recognized globally as the leader in helping technology-based businesses achieve superior performance in their core operational processes.
PRTM is a worldwide organization dedicated to achieving measurable results for our clients

Focus

PRTM was founded in 1976 with a unique focus

- Core business processes
- “Results, not reports”
- Technology-driven companies

Experience

More than 1,200 satisfied clients

- Over 6,000 successful implementation projects
- 90% level of repeat business

Depth

More than 450 consultants

- Technical backgrounds with practical experience and MBAs from top schools
- Low staff/director ratio with significant director involvement in all projects

Industry Knowledge

Aerospace and Defense
Automotive and Industrial
Computers and Electronic Equipment
Financial Services
Life Sciences
Retail and Consumer Goods
Semiconductors
Software
Telecommunications/Internet

Client Profile

- Over $1B
- Under $100M
- $100M to $1B
- Start-up

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PRTM practice areas address all core business processes

- Business Strategy
- Product Development
- Marketing and Sales
- Operations and Supply Chain Management
- Customer Service and Support

Information Technology Solutions
- IT Strategy
- IT Operations
- System Selection
- IT Implementation
- IT Outsourcing

- Strategy, Organizational Design, and Interim Management
- Business Process Assessment, Design, and Implementation
- Economic Modeling, Benchmarking, Research, and Due Diligence
- Program Management, Change Management, and Team Facilitation
- Co-Development, Partner Management, and Outsourcing

Business-Aligned Technology Implementation
Your perspective…

What is your interest in this practice?

What are your expectations for today’s session?
Using the “Voice of the Customer” to Drive Successful New Products
Complex companies have unique strategy, product, service, marketing, and sales challenges…

If we were to look at the most critical list of issues companies face, the following items would certainly be near the top

- Mistaking “customer experience” for “customer value,” thus creating an outstanding experience for customers who remain vulnerable to competition because the value of the services is perceived as weak
- Lack of information to leapfrog the competition by developing products, services, or strategies customers love, but would never have thought possible
- Misunderstanding of the customer’s buying preferences or supplier requirements one level away from the vendor
- Fear of commoditization and lack of information and analysis skill to determine if current strategic actions will reduce or increase commoditization
- Lack of a clear strategic focus that creates boundaries for service or product design, packaging, selling, and delivery
- Misunderstanding the policies, procedures, systems, and information that are needed to produce the best supply chains or internal operations
...that require customer input for success

Management needs ideas and continuous feedback from customers to stay relevant.

Product organizations must have market-leading strategies for their products.

Solution delivery organizations (e.g., channels or unrelated partners) need to represent value effectively.

Sources of customer information (e.g., CRM systems, customer inquiries, sales input, trouble reports) are seldom integrated with timely customer input on a specific development project.

Large customers of one operating company may be insignificant customers of another operating company, thus setting up inconsistent treatment and loss of customer loyalty.
However, most companies listen to their customers in a haphazard and non-repeatable way.

- They generate great ideas.
- They decide to develop products or services.
- They gain customer insight once the products are in the market.

A particular customer demands a specific solution.

- The company develops a product or service to meet those demands.
- They see what the really great idea could have been...
Best practice companies employ a more robust approach called Customer Inspired Design (CID)

They generate concepts that address customer requirements

They translate customer insight into an image of the customers’ context and into customer requirements

They dive into their customers’ current use environment and learn about problems firsthand—from their customers’ perspective

They select the concepts that best meet both customer needs and company capability

They transform well grounded, well designed concepts into winning solutions (often in conjunction with lead customers)

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Best practice companies employ a more robust approach called Customer Inspired Design (CID)

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<thead>
<tr>
<th>Category</th>
<th>Customer-Inspired Design implementation</th>
<th>FOCUS</th>
<th>Customer-Focused Design</th>
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<td>Recommended application</td>
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<td>✓ Product improvement</td>
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<td>✓ New product</td>
<td>✓ Narrow technical solution</td>
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<td>✓ New market opportunity</td>
<td>✓ Targeted towards obtaining explicit customer requirements</td>
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<td>Key characteristics</td>
<td>✓ Thoroughness of thinking</td>
<td>✓ Abbreviated metrics</td>
<td>✓ Intended for situations where customer requirements are known or reside in customer-facing personnel</td>
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<td>✓ Potential for discovery latent user requirements</td>
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<td>Time to complete a project</td>
<td>3 – 4 months</td>
<td>2 – 3 months</td>
<td>A few weeks</td>
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CID implementation may take various forms to suit specific company needs

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<tr>
<th>Situation</th>
<th>Customer-Inspired Design implementation</th>
<th>Outcome</th>
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<td>Significant &amp; innovative—potentially breakthrough</td>
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<td>Derivative Product</td>
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<td>Customer delighting extension</td>
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<td>Narrow Technical Solution</td>
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<td>Product Improvement</td>
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<td>Improved product out quickly</td>
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The core of any CID implementation is a technique of Voice of the Customer...

...a formal approach to gather and synthesize customer requirements

**Voice of the Customer approaches...**
- Are designed for exploratory customer requirements research
- Structure the “fuzzy front end” of market and product development requirements gathering
- Ground internal professionals in external realities
- Assure disciplined, focused thinking
- Tap the intuitive knowledge of experienced professionals—their experience allows them to see what market researchers cannot
- Proactively identify explicit and latent customer needs
- Facilitate a thorough exploration of potential options that are created in response to clearly articulated needs
- Self-document the teams' thinking and decision making
- Align diverse individual perspectives to a common understanding

**Our experience goes back to 1992, and we have a track record of satisfied clients**
- We provide a best practice framework to identify the winning customer requirements
- We facilitate the design of responsive solutions based on facts
- We integrate the requirements process into product development
- For companies that know how to develop products the right way, PRTM helps them develop the right products and achieve their target market share and price levels
We’ll use some terms today that we should all use in the same way

“A Customer” = any expert, buyers, channel member, influencer, specifier, who has information to add knowledge about a subject

“VOICE” = an actual quote captured directly from an individual, usually in a face-to-face meeting

Need: A problem, concern, or issue, either stated or latent, that a “customer” has, which can be translated into a “requirement”

Requirement: A statement, aligned directly to a “need”, and having specific content on which service or product development can base a decision
One of the key VoC applications is to collect customer requirements for new product development.

PRTM created a unique VoC toolkit that integrates into the front end of product/service development.

- **Understand Customer Requirements**
- **Develop Concepts to Meet Customer Requirements**
- **Validate Requirements and Concepts and Select Final Solution(s)**

**Concept Phase**

**Definition**

**Planning**

**Development**

**Launch**

*Iterate with customers, refine solutions, and listen/respond actively during launch.*
How comprehensively you use the VoC to document customer requirements depends on the situation

<table>
<thead>
<tr>
<th>Situation</th>
<th>Steps</th>
<th>Plan</th>
<th>Visit</th>
<th>Understand Context</th>
<th>Translate Voices</th>
<th>Customer Requirement Insight</th>
<th>Generate Metrics</th>
<th>Survey</th>
<th>Create Solutions</th>
<th>Screen</th>
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<td>Customer Inspired Improvements</td>
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Input from sales & service
To summarize, PRTM’s VoC approach captures needs and converts them to requirements

VoC is a methodology that is based on using actual quotes captured directly from customers

- Usually in a face-to-face meeting, but also by phone, and through some new technology-assisted methods
- From anyone whose interest you represent or whose perspective can add value to your understanding

VoC is a process that allows a company to:

- Structure the “fuzzy front end” of strategic thinking, discovering new markets or new market opportunities, product or service development, or understanding supply chain problems
- Ground internal professionals in external realities
- Assure disciplined, focused thinking
- Tap the intuitive knowledge of experienced professionals—their experience allows them to see what market researchers cannot
- Proactively identify explicit and latent customer needs
- Facilitate a thorough exploration of potential solutions—that are created in response to clearly articulated needs
- Self-document the teams’ thinking and decision making
- Align diverse individual perspectives to a common understanding
Principles of PRTM’s VoC
Several important principles underpin PRTM’s process for collecting and using the VoC to design products

1. Developing a 360° View
2. Understanding Context
3. Processing Language Data
4. Trusting Your Intuition
5. Recognizing “By Chance” Opportunities
6. Partnership Fostering Ownership

Adapted from Center for Quality of Management

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1. Developing a 360° View

Means…

Beginning with an attitude of exploration

Viewing the issue of interest from many angles

Collecting a diversity of perspectives

Staying open to discovery

Resisting testing one’s own hypothesis

Adapted from Center for Quality of Management
2. Understanding Context

Means…

Swimming in the fishbowl—
viewing products and services from the
vantage point of your customers

- Understanding customer problems firsthand

Collecting real experiences, capturing
anecdotes, and stories

Adapted from Center for Quality of Management

Griffin & Hauser
3. Processing Language Data

Collecting real experiences, capturing anecdotes and stories from customers translates to “language data”

- The nature of language (qualitative data) is that it is often open to multiple meanings, multiple interpretations

- We tend to bring our own experiences to language we take in

Therefore, the tools used in our processes enable a group of individuals to work with language in a way that facilitates coming to common understanding of the language data
4. Trusting Your Intuition

Means...

Focusing the excellent thinking and intuition of your internal experts; their intuition is born of their years of experience in their domain of expertise, your industry, and your company.

“It is by logic that we prove, but it is by intuition that we discover.”

– Poincaré
5. Recognizing “By Chance” Opportunity

Means…

Clear innovation chartering enables team members to notice relevant input/ideas/solutions as if “by chance”

“…chance favors only those minds which are prepared.”
– Pasteur
6. Partnership Fostering Ownership

Means…

Each team member’s tacit knowledge becomes more explicit and shared

Each team member experiences the customer’s world firsthand

Team members create insight with others who share responsibility

Deciding together what the solutions should be usually means more commitment for implementation
“Redesigning Product Development” Video
Video

“Redesigning Product Development*”
(L.L. Bean using the process)

*Reference: Harvard Business School Publications (800) 988-0886
Workshop

- *Introduction*
  - Exercise 1: Planning a VoC Project
  - Exercise 2: Conducting Customer Interviews
  - Exercise 3: Developing Customer Requirements
Case — Developing a next-gen “carrier” for the business traveler

You are the hand-picked lead for helping Carry Co develop a next-generation product line for business travelers

◆ Carry Co makes a line of traditional suitcases and travel bags
◆ Carry Co has a standard and well received line of laptop bags and carry-on luggage models
◆ If the other big names in luggage have it, we have it

You have a cadre of excellent industrial designers, materials experts, manufacturing experts, market researchers, and the like

◆ You’ve recently had brainstorming sessions, but all the products end up looking like variations of “me-too” luggage and bags
◆ You’ve thought about it, and realized that you are just solving the problems business travelers you already know about, but you haven’t really hit on a problem that has never been solved or even considered before…

If you can get some really interesting “new” customer problems in front of your team, you know they will execute…

…and your star will continue to rise
The focus of the workshop will be on three critical VoC elements:

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<th>Steps</th>
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- **Plan**
  - Visit
  - Understand Context
  - Generate Metrics
  - Create Solutions
  - Screen
  - Test Concept
  - Select

- **Input from sales & service**

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- **Input from sales & service**

- **Leverage prior context work**

- **Translate Customer Requirements**

- **Derivative**

- **Innovative, Perhaps Break-Through**

- **Customer-Delighting Extension**

- **On-Target Technical Solution**

- **Customer Inspired Improvements**
Workshop

- Introduction
- **Exercise 1: Planning a VoC Project**
- **Exercise 2: Conducting Customer Interviews**
- **Exercise 3: Developing Customer Requirements**
A Project Plan includes

- Project Participants
- Project Purpose
- Objectives for Learning
- Company Fit
- Remaining Questions (for Sponsors)
- Sources of Existing Data
- Customer Profile Matrix
  - Interview Guide(s)
  - (Observation Guide)
  - (Project Schedule)
- List of Materials to take on Visits

Example: Project purpose

To explore the experiences of business travelers relative to what they carry with them on a daily basis in order to design, develop and deliver optimal solutions profitably for the next generation of personal carriers for the business traveler.
Example: Objectives for learning

To learn from their stories of past and current experiences

To understand what they typically carry

To understand how they typically transport what they need

To understand their problems and challenges with:
- What they carry
- How they carry it
- Where they carry
- Where they store
- Specific challenges relating to travel

To better understand how they acquire business accessories

To explore their individual purchasing experience:
- To learn about where and how they shop
- To explore their criteria for decision making regarding carrier selection

To explore their vision of the ideal carrier
Which customers to visit?

Consider both traditional and non-traditional segments…

<table>
<thead>
<tr>
<th>Examples: Traditional</th>
<th>Examples: Non-Traditional</th>
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<tbody>
<tr>
<td>• Type of industry or sector</td>
<td>• Lead users or thinkers</td>
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<tr>
<td>• Large volume vs. medium or low volume users or purchasers</td>
<td>• Happy customers</td>
</tr>
<tr>
<td>• Application of product</td>
<td>• Demanding customers</td>
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<tr>
<td>• Location in customer chain: Distributor, purchaser, user</td>
<td>• Dissatisfied customers</td>
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<tr>
<td>• Geographic location: Region of the country; continent; urban vs. suburban</td>
<td>• Customers you had, but lost</td>
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<tr>
<td>• Culture differences</td>
<td>• Customers you never had</td>
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<tr>
<td>• Gender</td>
<td>• Leading researchers, both academic and corporate</td>
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<tr>
<td>• Demographics</td>
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After considering the potential segments, organize them in a Customer Profile Matrix

The matrix frames the discussion: Which diverse set of 20 interviews will deliver the 360° view?
Workshop

- Introduction
- Exercise 1: Planning a VoC Project
- Exercise 2: Conducting Customer Interviews
- Exercise 3: Developing Customer Requirements
Interview preparation — Key guidelines

Interview objective is to immerse yourself into your customer’s environment…

… and to observe, observe, observe

Start with broad topics and then narrow to your area of interest — use a “stepping stones” approach

◆ Although you may want some general information about the interviewee’s business, do not dwell on it; quickly bring the discussion to your main area of interest
◆ Allot certain amount of time to each section of the guide and stay on track

Probe and actively listen to get to the true underlying needs

◆ Prepare to ask open-ended questions using phrases such as: “Describe…”, “How…”, “What do you mean by…”
◆ Avoid questions that
  – Elicit a single-word answer — yes/no questions
  – Seem to anticipate the “right” answer” – “don’t you agree…”

Do not consider the interview guide to be a “script”; it is only a guide
Sample Interview Guide

When you envision yourself traveling for business, what images come to mind relative to what you carry? (or tell me a story about your worst experience relative to using your current briefcase)

Describe the ways you use your briefcase in your daily routine

What benefits do you experience relative to what you currently use?

What are the problems or disappointments you have experienced?

If you were to think about trying a new carrier, what would your considerations be? (or describe your process when you acquired your current …)

Pretending that you knew nothing about current briefcase or computer case design, and that there were no design constraints, describe the perfect solution for your routine needs …

◆ Why would that be such a good solution?
Workshop

- Introduction
- Exercise 1: Planning a VoC Project
- Exercise 2: Conducting Customer Interviews
- Exercise 3: Developing Customer Requirements
We distinguish terminology related to requirements

**Customer Voice:** A direct quote from the verbatim notes of a customer interview; it might be a word, a sentence fragment, a sentence, or a passage. The chosen voice contains the seed of a customer requirement

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**Customer Requirement:** A sentence that describes the need/issue/problem that needs to be solved from the customer’s vantage point

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**Product Requirement:** A sentence that describes the functionality of the product that will solve the customer’s problem

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**Product Specification:** The specific technical solution(s) and performance targets for a given product requirement
Key themes and supporting voices — Our example

- I like to put my keys and sunglasses in two outside pockets
- Sometimes I carry my laptop, and sometimes I need to carry awkwardly shaped samples
- It has to be small
- Not expensive, but tasteful
Customer Requirement Guidelines

Requirement Statement Criteria

1. Identify a functional need, not a solution
   - A functional need tells *what* the solution should do; a solution tells *how* it should be accomplished

2. Be as specific as possible
   - Abstract or vague terms allow for multiple interpretations

3. Use multi-valued language
   - Allows for a requirement to be measured along a scale

4. Phrase the statement in positive language
   - The word “*not*” indicates a weakness-oriented requirements statement
Additional Resources
Media Resources

Books:

Voices into Choices: Acting on the Voice of the Customer
Gary Burchill and Christina Hepner Brodie (1997 Joiner)

Setting the PACE® in Product Development: A Guide to Product And Cycle-time Excellence
Michael E. McGrath, Editor (1996 Butterworth-Heinemann)
Focus:
Cross Functional Project Excellence, Pipeline Management and Technology Management

Product Strategy for High-Technology Companies, 2nd edition
Focus:
Core Strategic Vision, Planning and Managing Platforms, Portfolio Management and Product Line Planning

Video:

“Redesigning Product Development”
Harvard Business School Publications (800) 988-0886

Articles:

“Invigorating Strategy with Voices of the Customer”, by Christina Hepner Brodie, Insight, Summer 2000