

# How To Unlock Opportunities with Customer Conversations



By Eriks & Judy Celmins

# Introduction

Small business is told 'talk to your customers'. OK, but what's often missing is the How.

We're here to fill the gap, with a practical way to have meaningful customer conversations.

So you can gather insights into their ever-evolving wants & needs, and unlock innovative opportunities to continuously surprise & delight them.

**Part 1** lists some of the common methods, while debunking tightly-held, but misleading beliefs. **Part 2** shows you how to have a Power-Chat that connects you with people at a deeper level.



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# Part 1 Myth-Busting

On the surface, the digital age makes it seem easy to collect feedback. But there are also many, really fast ways to get it wrong. And still not get to the heart of your customers' daily life and emotional motivations, where true opportunity is found.

# Customer Surveys

A survey is not a conversation, it's a cold, one-way transaction. A survey can be a useful tool to review your current position, and how you got there. But it can't predict future behaviour.

It's also a very lonely exercise for your customer!

If they like you enough go to the trouble of answering your questions, what happens next? Many feel like they've been left hanging. Were my responses of value? Is there an outcome? Most businesses never follow-up, and defeat the purpose of customer relationship management.

We've just been through lockdown, and reminded that isolation isn't fun for anyone. So we need to up our game when it comes to making customers feel like they matter.

There are times when a survey is the right tool. For instance, when qualifying a database for a Power-Chat (see Part 2 below). So if you'd like some tips on making a survey more engaging for any purpose, you can download our Survey Tip-Sheet [here](#).

# Social Media

We often hear businesses say, “I’m going to just have a Facebook Messenger chat with a select number of customers”.

Now before you jump in, you need to know some facts.

From your own point-of-view as a business, just because it’s a private page, doesn’t mean you own the data! Facebook might be free from a monetary perspective, but it’s very expensive, if you consider how much you’re giving away to use as they wish, beyond your control.

For your customers, the trust & privacy horse has well and truly bolted. After incidents like the Cambridge Analytica scandal, many are wary of what they say on social media.

When people join your group, their profile is on display. And, let’s say they make a comment that someone else takes offence to. They now have the means to harass them outside the group. That might sound extreme, but the more that people think about these aspects, the more guarded they’ll be in their comments.

Remember - the reason you need to talk to customers is to give them an outlet to tell you honestly, without prejudice, what they feel, how and why they use you, or a competitor.

Really, what's the point of going to all this trouble of gathering opinions, if you can't trust what you get back!

And if you want to record video chats, please review the next section on Zoom for further tips on safety & privacy and management of the session.

# Zoom

This burst into our lives and language at lockdown, as we frantically looked for ways to have some sort of normal work and social life. To the point where it's become a default for many types of conversations, events, performances – you name it!

And of course considered a cool, new candidate for interaction with customers. But there are caveats around gathering a group of complete strangers on video. They're not workmates or family where there's a comfortable familiarity – you need to cover yourself.

A couple of the main concerns are about how ...

- URLs are easily hacked, with reports of gate-crashers.
- Video recordings can be made public

Zoom is constantly upgrading security, but you should always think safety first and don't rely just on the software to protect your customers and your business.



## Safety & Privacy Tips

- If you want to record the session and edit & share around the team, you're deep in the territory of international Data Protection & Privacy laws.
- Always tell participants at recruitment, so they can formally agree, that the session will be recorded and shared with your team – '*so they get to hear your feedback*'. But will not be made public in any form.
- Keep the age-group strictly 18+ to avoid any issues around minors.
- Only have a single-gender session to avoid potential stalking issues.
- Keep the maximum number of participants to around 12, so you can stay in control of the flow. Avoid the temptation to pack them in for a bigger sample.
- Don't publicly share your Zoom Meeting ID. Send it directly to the people you want on the session. Set a password to join the meeting and only share it with those who need to know.
- Make sure Screen-Sharing is set to Host-Only to prevent Zoom-Bombing, or other participants from hijacking the meeting with random images.

- The Waiting Room feature is usually the default, but double-check it's enabled, so you manually choose who enters the session. You can customise messages and images to make it more friendly.
- Re-name the recording file from the Zoom default. Call it something that doesn't indicate it's a Zoom video call.
- Only upload a saved Zoom video to services such as Dropbox, or YouTube, where you have a private account enabled.

Not so simple after all! And then, when you have this group on-screen, be aware of the dynamics in play.

Such is human nature, people will check out each other's looks and backgrounds, and make subconscious snap judgements. And because everyone knows this is happening, it adds stress, and may inhibit a more open expression of the thoughts & feelings critical to your innovation pathway.

There's also the potential for more forceful personalities to dominate at the expense of quieter types. You need to be polite but firm, in making sure everyone has their say.

Having a periodic '*let's go round the room*' exercise is a common technique in focus-group research, and why numbers need to be limited.

# Satisfaction & Net Promoter Scores

It's hard not to be sceptical when we see these in play, as people are annoyingly bombarded with them through the purchase process – *'how did we do?'*

But amuse us, and ask yourself, for example – Did you discover how to make your customer's life better? What sets you apart from competitors? What are their obstacles in using your product? Did they enjoy the experience of filling in the form?

People often rush through questions just to get rid of you – which is a negative customer relationship.

Remember, the goal of having a conversation with your best customers is to understand them better, so you can surprise & delight them. Your livelihood is dependent on how much value you provide.

Not *'how we did'* yesterday, but how we'll do it tomorrow.

# Start a Conversation Out of the Blue

Let's say you bail up a customer while they're in your place of business. Now, you could run through your list of questions, but again that's not a conversation.

And if you just have a general fluffy chat, that's not a targeted conversation.

A conversation for the purpose of gathering insights is designed to improve your offering, and is totally different to small talk.

## Part 2

# Time for a Power-Chat

Now we have all that off our chest, let's dive into how to have a conversation with practical results.

# Fuelled by Engagement

It's a bit of a buzz word these days. But without engagement you're not going to get the level of commitment you need from customers.

Over years, we've watched market-research participation rates decline. With a large possibility that people are just ticking boxes to get it over with to collect the incentive.

But as soon as we introduced marketing-style engagement, the quality improved.

If you haven't read it yet, then download our free **How-To Engage Customers for Stronger Relationships**

“

*Building a relationship with customers isn't complicated, but it does require you to consider them as real.*

*Engage4Insights*

”

## Make It an Event!

One of our favourite ways of engaging customers for insights, is hosting a live group event. It's about making it fun & entertaining, as well as making customers feel like they're part of your team. And that their opinions really make a difference.

But it's also very important that you do it the right way. Today, safety & privacy are people's #1 concern. If you unwittingly expose them via social media or more public online platforms, as we mentioned earlier, they won't be relaxed. And that mood has a direct correlation with the way they reply to your conversation topics.

Put yourself in their shoes for a moment. If you feel uncomfortable, what comes to mind and out of your mouth can be defensive and argumentative - or maybe you don't even care about your response. Just get it done & dusted!

But on the other hand, if you're enjoying the experience, everything changes. You're more inclined to be helpful, and think about your contribution.

# Step-By-Step:

## How to Set Up a Power-Chat

### 1. Create a Pop-Up VIP Club/Community

We're assuming here, that you have a customer list of at least names and emails, with contact permissions, and that you keep in touch with them.

This is fundamental to relationship-building throughout all of your marketing and purchasing activities. A neglected database that you haven't contacted in months is a total waste, and a roadblock to your growth.

We strongly recommend you invite people to join a VIP group, with a name that fits your brand. '*Join our team!*' is an inclusive Call-To-Action.

They can be marked in your database, to receive preferential benefits like a first look at new features/products, 'mates' rates' special offers, expert-guest advice on using your product, fun events & competitions, and so on.



And for insights-gathering they are readily accessible to invite to a Power-Chat, where they can talk to each other as part of influencing your business.

There are many examples around - you probably belong to at least one, and there are endless possibilities for engaging activities. It doesn't have to be complex and resource-hungry. You can start simply as a 'pop-up', and gradually grow - the effort will pay off in spades.

The 'sense of community' you cultivate with customers will promote trust, safety, and loyalty, and provide extra protection against the headwinds of price-wars, new competitors, and external events beyond your control.

“

*Customers who feel valued will share what motivated them to buy. They'll let you know how it met their needs, as well as what annoys them.*

**Engage4insights**

”

## 2. Segment Your VIPs

In some cases you might want to segment your VIP list into different groups. If, for example, you service both younger and older ages, you won't want them in the same Power-Chat session. Some Topics will be the same, but others may have to be different.

Remember the aim is to have a conversation, and that should be between themselves, as well as with you. This is when a chat is really powerful, but if their life experience and values are too far apart, it won't be as engaging for them. When they have a lot in common, like a group of 25-39 women with children, you'll have a deeper, more open conversation, revealing nuggets of opportunities.

### OR

You could identify distinct groups of customers who use your product for different purposes. A specialist-user group gathered together, will get on like a house on fire, and spark a wealth of feedback and practical ideas for innovation.

*This can only be a top-line guide, as the exact database segment fields you need, will be specific to your category and business.*

### 3. (Optional) Talk to Competitors' Customers

Sometimes you may need to reach out beyond your current database, to gain insights into your competitor's customers.

True, this will cost you more to find them, and recruit into a database - usually by advertising in social media channels.

If they purchase in your category, but from someone else, it can be highly valuable to find out Why?

What is it that your competitor does that makes them more appealing?

When you understand your competitor **Power-Chat** participants in this way, you can specifically target messaging and advertising based on the responses in their own words.

## 4. Invite People to Your Power-Chat

Armed with your segmented VIP list, it's time to invite them to a friendly chat. Depending on your business, you could do this face-to-face. You might even have something they need to physically see, taste, touch, try, in order to give you feedback.

But in many cases online is perfect - when fast, low-cost, and engaging.

A key benefit is anonymity. People feel much safer about sharing what can often be personal stories, in a private but still social setting, on their own device, and in the comfort of their own space.

In one of our chat sessions, a participant shared that she couldn't afford tissues for winter colds, so instead bought toilet paper for her family. Which sparked others to contribute to the conversation, saying the same thing.

But that insight might not have even seen the light of day, if it was face-to-face. She may have been too embarrassed to say anything.

That might seem a tiny detail. But our client spotted a timely opportunity to surprise & delight customers, and used that info to seed a new promotional campaign around making life easier on a budget.

## 5. How Many Should You Invite?

You're looking for around 25 people for an online Power-Chat session. Based on our experience it's a tidy number to manage, while stimulating the conversation.

Many more than that, and the amount of raw information can become unwieldy. It's the quality of the participants that matters, not the quantity. And making the experience fun & entertaining significantly raises the return on your efforts.

However to achieve a final 25 participants, you'll still need to send invitations to a much larger number e.g. 100-150. IF they're already 'primed' to be engaged, as part of your VIP group.

The less primed they are, the more invitations needed, which can also depend on your list's profile. Men in general, especially younger, are less likely to show-up than adult women who tend to be more active on social-media and discussions in general.

Even with the best of intentions, life happens, and there can be a large no-show, dropout rate.

We've often found people who really wanted to attend, but were side-tracked at the last minute. In some cases they've asked if they can join in later.

We always say yes - remember this is ultimately about a relationship. And you never know what value they can add.

Have a set start time, at say 7pm on a weekday evening. Or whatever is best for the lifestyle of your target. The appointment ensures a busy, interactive session with lots of energy in the room. And run for no longer than 90 minutes, to maintain focus.

Always offer a prize-draw incentive, as thanks for participating. People love being involved in a social chat, to make a difference, but it is a time commitment.

Retail gift cards are popular, as they can spend how they want. Several prizes worth \$50 each says more chances to win, and more attractive, than one larger prize with lower odds. Gift packs of your product and/or promotional merchandise would also work.

## 6. Selecting an Online Chat Tool

Obviously we recommend you use our online chat-platform **Social Forum** 😊

This was born of a need we identified, to combine market-research trade standards of privacy & security, with a familiar, user-friendly, social media interface. Providing simple management of the topics, and instant reporting.

We've had outstanding results from 'real' people (that's you), with a direct need, talking to other 'real' people to find out what they need.

Yes, sometimes it helps to have a neutral third party person to run the session. But in most situations, you're the best person to host the conversation, because people like talking to and influencing decision-makers. And **Social Forum** makes this very easy.

In this age of AI-bots, where machines often handle transactional queries, being an actual, warm-blooded human takes on even greater importance to build a relationship.

## 7. Structuring the Conversation Topics

This can get the best of us stuck, spinning wheels. You either stare at the page, not knowing how to phrase & present your questions OR you write something that's misleading, leading to a biased answer, ambiguous, steering them in the wrong direction. We've seen it all!

It's why we've created our Power-Chat Topic-Builder, that slots in nicely with Social Forum. Our Topics are beyond standard survey questions – they are 'conversation-starters' guaranteed to stimulate discussions yielding useful insights & opportunities.

To get you started today, we offer a handy Tip-Sheet with extracts from the **Power-Chat Topic-Builder**. You can download your free copy [here](#).



# The Final Say

For quality insights that help you surprise & delight your customers, you need to have a warm & meaningful conversation with them.

One that helps your 'guests' feel relaxed and valued.

Once you're on that path, you're opening a world of exciting opportunities for your business to grow or pivot your offering.

## **P.S.**

*This is a general guide on **How To Unlock Opportunities with Customer Conversations**. It's beyond our scope here to provide detail for specific categories and situations.*

*However we'd love to help run a conversation session **With You** or **For You**.*

*We're budget-friendly in these tough times, and want to see you not just Survive, but **THRIVE!***

*Please contact **Judy Celmins**,  
**[judy@engage4insights.com](mailto:judy@engage4insights.com)***

# About The Authors



Eriks Celmins brings a wealth of global experience in turning customer insights into winning innovation.

He runs both in-depth quantitative & qualitative research, using **The Engagement Method™**, and **Social Forum** chat-platform. Helping businesses gather actionable insights and build customer relationships.

Eriks is a full Member of The Research Society (formerly Australian Market & Social Research Society).

*"I'm always open to exploring creative solutions to research challenges. Reach out to me personally if you want to hash out some ideas, or connect with me on [LinkedIn](#)."*



Judy Celmins is a born marketer, with a passion for understanding why people buy.

So you can surprise & delight customers with innovation.

*"I love taking what other people see as obstacles, and finding creative solutions".*

*She also hosts the ThriveableBiz podcast with global, expert guests. It's always exciting working with Judy. Catch her on a roll, and watch the ideas flow.*

**Power-Chats** are an essential step in our **Innovate To Win** pathway.  
It's time for your business to THRIVE.

Find out more by heading over to [thriveablebiz.com](https://thriveablebiz.com)

