



mediahawk

# The customer insight playbook

An agency marketer's guide to getting maximum ROI from customer insight

# An introduction:

“The customer is always right.”

It’s been the mantra of the service industries since the saying was coined by retail bigwigs in the 19th century. Back then, pioneering businesses knew their success depended on keeping customers happy.

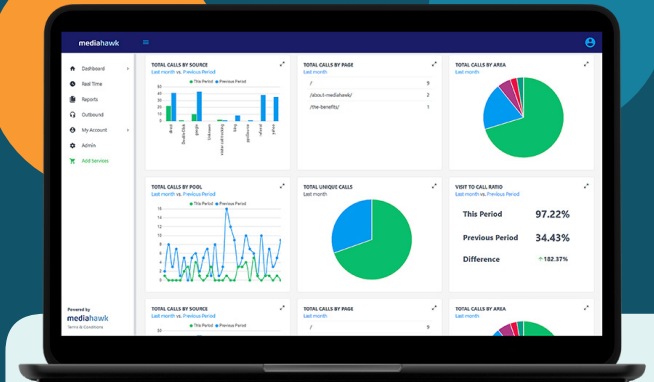
**Today, knowing what makes clients and customers happy couldn’t be more critical to the growth of a business.**

These days, businesses live or die by customer reviews, and opinions spread like wildfire over social media. Brands that deliver an over-and-above experience are rewarded with customer loyalty and elevated status (think John Lewis, Apple, Hotel Chocolat et al). Those that fail to gain an in-depth understanding of their customers’ needs inevitably fall by the wayside.

**Marketers have never had so many different data sources to mine for insights on customer behaviour.**

But finding the most valuable and impactful insights can be tricky. And putting them to good use once you’ve found them can be trickier still. After all, insights aren’t very insightful if you don’t know how to implement them.

**This ebook will guide you through some of the best ways to gather truly valuable customer insights, and how to put them to good use across your agency.**



## More than just a load of old persona profiles

‘Customer insight’ has become the marketing buzzphrase of recent times. As an agency, knowing your clients and their customers in diligent detail requires you to:

- ✓ Build persona profiles
- ✓ Hold focus groups
- ✓ Conduct stakeholder interviews
- ✓ Send out customer surveys
- ✓ And more

THE TRUE VALUE IN CUSTOMER INSIGHT...

# The true value in customer insight

Customer insights aren't just a nice-to-have. They're essential for delivering targeted campaigns that resonate with clients and customers.

In fact, there are six ways valuable customer insights can benefit your agency and drive growth.

1

## Know the best ways to reach target audiences



To effectively target your clients and customers with your campaigns, **you need to know where they go for information** and how they prefer to consume it.

2

## Spot trends and patterns



With quantitative insights, you'll start to spot bigger-picture trends in customer behaviour – allowing you to **create campaigns with a broader appeal**.

3

## Stay ahead of the competition



Strive to understand your clients and customers better than anyone else. If you do, **you'll always be at least one step ahead of the competition**.

4

## Cut wasted spend



If you know exactly how your clients and customers consume and interact with your content, you can stop doing the things that don't have an impact – **saving you time and money**.

5

## Retain clients



By truly understanding your clients' and their customers' needs, you'll earn their trust and respect, **making them much more likely to stay for longer**.

6

## Better serve clients



Customer insight isn't just for marketing purposes. It can help you develop your service offering, too. **Use the insights to build a suite of services that are finely tuned to your clients' needs**.



HUNTING DOWN VALUABLE CUSTOMER INSIGHTS...

# Hunting down valuable customer insights

First things first – customer insight is not just about demographic data.

Developing persona profiles – either for your agency or for your clients – that focus on details such as the target audience's age, gender and lifestyle choices won't be enough.

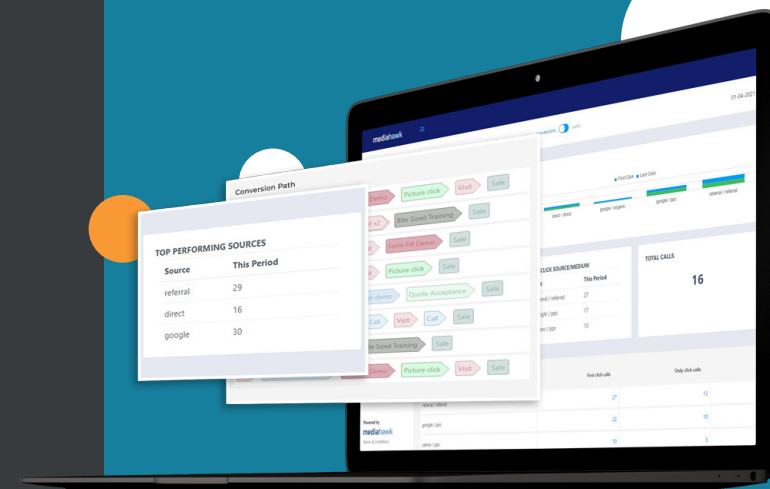
No mistake, this is useful information to know. But it certainly isn't the kind of insight that will move the needle for your marketing campaigns.

The *real* insight comes from the behavioural data you can gather about your clients and their customers.



**A good framework, championed by marketing guru Adele Revella, is to focus on five key areas when trying to understand a target audience:**

- 1 Triggers** – the reasons why the target audience goes looking for the products and services you or your clients offer.
- 2 Perceived benefits** – the results they hope to achieve from investing in the product or service.
- 3 Perceived barriers** – the reasons why they might choose to not invest in the product or service, or choose a competitor instead.
- 4 Trusted resources** – the places, sources and people the target audience trusts when doing their research.
- 5 Decision criteria** – how the target audience makes its final decision, including the make or break factors.



## Getting the right insight

**The key point here is that these are behaviour-based insights, focused on your clients' and customers' buying journeys.**

**It's the cold, hard data you need to get a clear picture of how they make buying decisions.**

While it's nice to know that your target audience plays golf at the weekend and drives a BMW, it's these in-depth, behavioural insights that will help you truly understand what makes them tick.

**UNEARTHING VALUABLE INSIGHTS: WHERE TO FIND THEM**



# Unearthing valuable insights: where to find them

It seems obvious, but the best insights will always come straight from your clients and customers themselves.

Stakeholder meetings, sales team interviews and surveys are still useful and important parts of the process. But if you can speak directly with a handful of decision-makers from your target audience, the insights you'll uncover will be worth their weight in gold.

**Two types of insight: With any customer insight gathering exercise, you're looking for two types of information: qualitative and quantitative.**

## Qualitative insights

**This is the real detail – the juicy, 'ah-ha!' moment, that really gets you inside your clients' and customers' heads.** Spend 20-30 minutes on the phone with some of your best accounts (see page 6 for a definition of a 'best' account) and they'll open up to you in ways they never would in an email survey.

## Quantitative insights

**Anything you gather through qualitative research will need to be validated with some wider, quantitative research.** As juicy as the qualitative insights will be, you shouldn't be tempted to rely on them for building your campaigns. Just because one person said they never look at Facebook, it doesn't mean your entire target audience feels the same. By conducting supporting surveys to a wider sample base of your target audience, you'll be able to match any trends in the results to the detail you gathered from your interviews.



### TOP TIP:

Don't approach client interview calls like the Spanish Inquisition. **Keep it informal, letting them lead the conversation.** If you ask them direct questions about their buying journey, they may not talk about the things that really matter to them. Instead, start them off with a question like "Tell me what was happening at your business before you started your research". It's open and invites a much more insightful response.

### TOP TIP:

Be sure to ask the same or similar questions in your quantitative surveys as you use in your qualitative research. **That way you'll have an easy way of matching up the responses to your qualitative research** and a better chance of spotting those valuable trends and patterns in behaviour

**UNEARTHING VALUABLE INSIGHTS: CONTINUED**

# Unearthing valuable insights: where to find them

## Finding your 'best' accounts

Knowing who to speak to is crucial for getting the best insights. It's important to pick decision-makers from your best accounts.

And by best, we mean whichever accounts are most important to you. They may be the most loyal clients or the ones that bring in the most revenue for your agency.

**Choose the accounts that you'd love to have more of, and the insights you gather will help you attract more of the same.**

## Other useful ways to gather insights

Once you've mined your clients and customers for insights, don't forget the valuable experiences your **sales, customer services and account management teams can add.**

Not to mention all the data you have stored in your **marketing and analytics tools.**



**Here are some places you should be able to find a goldmine of insight to feed into your campaign planning:**

- ✓ Focus groups
- ✓ Customer relationship management system
- ✓ Call tracking software
- ✓ Google Analytics
- ✓ Social listening tools
- ✓ Sales/account management team

**TAKING INSIGHTS TO THE NEXT LEVEL...**



## Taking insights to the next level

You may not think of it, but there's something else you can use to bring in some high-value customer insights. You've probably got this device on your desk right now.

The phone and the conversations you or your clients have on it can be a rich source of data, too. But where to start? Some of the key insights you can gather on your target audience will come from everyday phone calls. And a good call tracking tool can help you make finding those insights a quick and pain-free process.



### What your phone can tell you about a target audience

With call tracking, you can capture a world of customer insight that you can feed into your strategic planning.



#### Speech analytics and call recording

If you don't have time to conduct qualitative interviews with clients and customers, [speech analytics](#) and call recording features will be your best friend. With call recording, you can listen in on real-world phone conversations to hear directly from clients and customers about the issues that matter to them. **Speech analytics allows you to automatically identify keywords callers use, meaning you no longer need to listen to every conversation to find the best insights.**

You'll also be able to identify trends in behaviour – for example, which sources your callers use for their research – **meaning you can adjust marketing spend to achieve the best ROI.**

You may also find there's a difference between the words and phrases people type into search engines and the things they say when on a phone call. As more and more people use voice search to find what they need online, these insights can help you refine and perfect your voice search strategy, too.



#### Visitor flow

This allows you to **track individual customer journeys** from the first time they landed on a website to the point they made a call and any actions before and after that – including the source and medium, plus any touchpoints across multiple visits, such as:

- Live chats
- Communication opt-ins
- Downloads
- Call to action clicks

With visitor flow, you'll have a much better picture of all the ways the target audience interacts with you or your client during their buying journey. This is great insight if you want to [build a detailed customer journey map](#), too.



#### Source flow

As with visitor flow, source flow gives you the ability to **track where clients and customers have come from and associate them with phone calls they made** – or any other call to action. This helps you better understand the sources they use and the mediums they prefer when doing their research.



#### Assisted clicks

You measure first click and last click in your analysis, but what about the clicks in the middle that influence or assist a decision to contact you? With assisted clicks, **you can understand how customers interact with you throughout the entire journey** – not just at the beginning and end.

### PUTTING YOUR INSIGHTS TO GOOD USE...

## Putting your insights to good use



Once you've gathered some hot new customer insights, you'll want to put them to good use within your agency.

A common mistake we see all the time is when marketing teams keep the insights to themselves. Don't fall into this trap. Any insight programme should be shared far and wide within your agency or within your clients' organisations.

Be sure to pass on your insights to all departments that can make good use of them. The point is to get everyone thinking from the client or customer's perspective.

Every team can benefit from knowing more about the people you deal with day in day out.

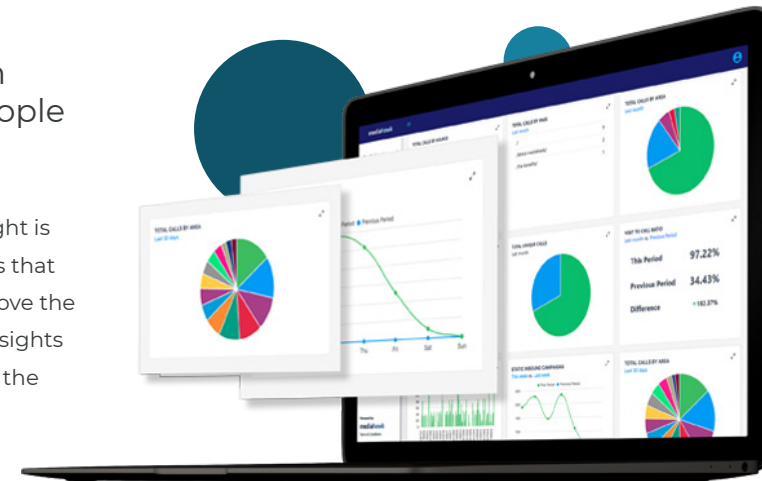
This is where the real ROI of customer insight is found. Creating some persona profile PDFs that sit in a dusty folder on your server won't prove the value of customer insight. But when the insights are actionable and used by every corner of the business, the benefits are clear.

### Getting maximum value from customer insights

Beyond marketing teams, here are just a few departments that can benefit from the customer insights you gather.

#### Sales teams

Sales and business development teams will be able to better understand how customers get to them in the first place. It's the unknown part of the buying journey that salespeople often aren't privy to. But having this insight will help them do even more to secure sales and retain customers.



#### Product and service development teams

Anyone tasked with developing products or services will have a deeper knowledge of the challenges and pain points facing the target market. Using real-world feedback and conversations, they will know the issues that keep target audiences awake at night and be able to develop solutions to help.

#### Customer service teams

Customer services will be able to pre-empt the issues that customers may be having and give them the support they need even before they ask for it. They will better empathise with customers in their hour of need and deliver answers to their problems that take wider challenges into consideration.

ARE YOU READY TO GROW YOUR AGENCY?



## Are you ready to grow your agency and drive up ROI with valuable customer insights?

Our agency partner programme is designed to help agencies prove their worth to clients and build longer-lasting, stronger, more profitable relationships.



### With Mediahawk's call tracking and marketing attribution features, agencies can:

- Improve campaign ROI
- Achieve 100% marketing attribution
- Understand customer behaviour in greater detail
- Be confident in recommendations you make to clients

Many of the ideas explored in this guide are quick and easy to set up.

Get in touch to find out more and request an online personalised demo. We'll be happy to explore how Mediahawk could work for you.

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### With our help you can:

- ✓ Put in-depth lead insights at your fingertips, with easy-to-digest, customisable dashboards and reports.
- ✓ Attribute leads and sales across any online or offline channel and know which activities and sources deliver the best results.
- ✓ Know the pain points and challenges of the audiences you target, based on real-world insights from phone calls.
- ✓ Fine-tune marketing campaign messaging to better appeal to target audience needs

Request your demo today

Call:

**020 3131 4616**

or visit:

[mediahawk.co.uk/agency-partner](https://mediahawk.co.uk/agency-partner)