

QRC A

VIEWS



Collaborating to
GROW

SCHOOLS OF THOUGHT
Today Calls for
Innovative Solutions in
Reaching Participants

TOOLBOX
Cooking without a
Recipe: How to Create
Your Own Projectives

TRENDS
To Call or Not to Call:
The Trend of Texting



AN INTERVIEW WITH KAREN MANGIA, VICE PRESIDENT OF CUSTOMER AND MARKET INSIGHTS AT SALESFORCE.COM



By Kay Corry Aubrey n UX Researcher and Trainer n Usability Resources Inc. n Bedford, MA n kay@usabilityresources.net

We recently talked with Karen Mangia, vice president of Customer and Market Insights at Salesforce.com about how qualitative research fits into her company's multi-modal research approach, using moderated online communities to gather customer insights, and some of the ideas in her book, *Success with Less*.

Kay: *How do you do voice of the customer research at Salesforce?*

Karen: We do this in a variety of ways. Like many companies, we do a number of big surveys that offer people from all over the world in all different kinds of job roles and companies the opportunity to provide us feedback about the health of our relationships and their perceptions about our brand—who we are, what we do, and our value proposition. They give us feedback about when we win, why did we win,

and when we lose, why did we lose. We think about those as top-level metrics that we're tracking for the health of business over time.

We also do the classic time and effort listening after our customers have an opportunity to interact with our support teams. From there, we also do a series of touchpoint surveys and focus groups that give us the opportunity to test new products, new pricing, or new messaging, including the mainstage presentations that you see at our big events around the world.

We engage on a global scale through a series of high-touch events, like advisory boards and councils, and road shows, as well as something we call our Idea Exchange, which is the chance for our customers to provide us feedback online about product features they want us to bring to market. Within Idea Exchange, we vote up and crowdsource the features that make the most sense. We want to make sure we're reaching a broad audience with what we're bringing to market, and in what order.

Kay: *So, you use moderated online communities to gather customer insights.*

Karen: We really do. Something that differentiates Salesforce is our Trailblazer Community. We have millions of people around the world giving us feedback on a regular basis and answering questions for each other. It's the best of building a community of people who can help each other, but also who are always on and giving us the pulse on what's happening with our products, with the way that we're going to market, and what they're seeing and observing. It's a critical pulse because it scales so well globally.

Kay: *Within Salesforce's multi-modal research approach, where does qualitative research fit in?*

Karen: We believe that everyone at our company can gather valuable insights that help us understand how we can alter our priorities, capture and unlock new market opportunities, and go to market differently. We don't think of listening to customers, especially in the qualitative sense, as a single function. It's more as a practice of how we run our business. We have some programs that live with our Office of



As we watch industries getting disrupted, companies are trying to enter areas where they've never competed before and never had a presence, and they're looking for strategic leadership.

Innovation, some inside our technology marketing and product organization, and others in our customer-facing teams as well. We believe it's important to be able to be close to customers, no matter where they are. The qualitative research outcomes range from how we might name a product or bundle the pricing of what our customers already buy. Sometimes we're testing new market messages. When we're talking about a new product that will help deliver value to your business, we'll check with you in advance: "Are we addressing a problem that you have? Is the way that we're thinking about delivering this to you something that you're actually going to

be able to measure, and be interested in the results?" We use that kind of engagement for understanding and keeping a pulse on what leaders in the C-suite across businesses all over the world are talking about, and challenges they're trying to solve. It's an opportunity to get a little proactive and identify new opportunities to engage with customers in strategic ways.

As we watch industries getting disrupted, companies are trying to enter areas where they've never competed before and never had a presence, and they're looking for strategic leadership. They're looking to learn from and benefit from other businesses



who might've gone before them, and so that's helpful for us to know. Where are they thinking about growth? How are they thinking about making changes that we might not necessarily associate with them if we were just engaging with them on a day-to-day business or performance-type level?

Kay: *In your mind, what abilities does a great qualitative researcher have?*

Karen: Be naturally curious—constantly be thinking about and interested in how things and people work. Learn to ask great questions and leave plenty of room for the answers. The goodness tends to be when people ruminate and process those questions or interact with each other in a group as they consider their answers. And then the third piece is to listen for what's not being said. Be curious and look for unlikely connections. That's when you typically get to the heart of the feedback, the heart of the issue, and the opportunity to innovate with your customers.

I think there's constantly a push and pull debate: Do you have to be an expert

in a topic in order to be an effective qualitative researcher? With a few exceptions, I disagree with that theory. If I were to conduct qualitative research about nuclear power, for example, I'm not a subject matter expert in that topic so I'm going to hear things with very fresh ears and eyes, and be able to observe things that I wouldn't if I really knew that topic in-depth.

Kay: *Let's talk about your book, Success with Less. The ideas you describe for how a person can build a fulfilling life are simple and practical.*

Karen: The whole idea behind the book *Success with Less* is that success is a formula you define yourself. You have the authority and the opportunity to evolve that definition over time. What frequently happens is that we get trapped in a limited view of what success looks like because it was imposed on us by someone influential, such as parents or a boss. Over time, what success looks like for each one of us as individuals can be very different, as we have different goals. The idea behind the book is to share some tools and some

resources to assess what your top goals are at any given time, and what success looks like to you. This then gives you the courage and the encouragement to release obligations from your calendar and your life that are no longer moving you toward that goal. It will help you to free up time for the people and experiences that do.

Kay: *When making big decisions and everyday decisions, you advise the reader to "pause, ponder, and prioritize."*

Karen: We are all moving so quickly and when you and I are in the process of doing, just moving to the next obligation on the calendar or the next buzzing text message on your phone, we aren't using that time to be thoughtful about why we're doing those activities. When you have a big goal or you want to make a change, whether that's getting a promotion or losing weight, or having a better relationship with someone in your life, you can't think about how to do that and what really matters when you're in constant chaos and always "on." The "pause"—and it can sound a little bit scary to take even a moment away from being constantly active and connected—is to take a breather and think, "Am I enjoying my life right now? Am I being successful with the things I care about?" It's hard to have perspective and go in a new direction when you're just moving from item to item on your calendar.

The second piece is "ponder." If I could only be successful at one thing right now, what's the most important thing to me?

And then the last piece is "prioritize." What are you willing to take off your calendar or out of your life to make room to be successful at that priority? It doesn't have to be something sweeping where you're going from eating junk food every day to a juice cleanse for a month. You don't have to go from being

constantly busy to living off the grid in order to regain a sense of balance or progress. Big gains happen in small steps. I think the first piece of it is being clear about the goal you're moving toward, and then in small steps retooling where you spend your time to make room to be successful and make progress toward realizing that goal.

Kay: *What prompted you to write this book?*

Karen: What's interesting about mentors and advocates is they often see something in you that you don't see in yourself, and that's how I ended up writing a book. I was asked to give a motivational speech at the end of an executive women's conference, and I thought I sounded horrible. The only reason I agreed to do it was because I really liked and had a long-standing relationship with the woman who was organizing the conference. At that point I had been battling health challenges and became conscious that I had a limited amount of time and energy, and I needed to spend it more wisely. So I framed up this whole story about learning how to pause, and that the pauses we choose are empowering and feel good, and the ones that are forced upon us usually come by way of a crisis, in my case major medical, and they feel very diminishing and very painful.

So I gave this speech, and a woman from the audience contacted me a few days later and said, "I want talk to you about your speech." We met and this woman's entire job is helping women start their own businesses and have a bigger platform and the resources to do that. She told me, "I think you have a message that people need to hear because you're still in a successful career, and by all accounts, your life looks great but you're willing to tell us

everything that went wrong and kind of normalize that. I think there's something powerful here and you have an opportunity. Let me connect you with some resources to expand your concept, maybe consider a book."

It was through her encouragement and mentorship that it all came to fruition. I'm so grateful that it did because it's been a fantastic platform to connect with people and to be real. Life is challenging and we're all looking for tips on what works, and some opportunity to be reminded that everything doesn't go perfectly all the time, and

that sometimes we need some encouragement to go in a different direction.

I enjoy connecting with people at all different levels on their journeys because of the book, and that might not have happened otherwise.

Kay: *Thank you for writing it and sharing your wisdom. Thank you so much for agreeing to do this interview with me. You're wonderful to talk with!*

Karen: My pleasure. I enjoyed visiting with you, as well. Thanks so much for the opportunity. 🐄

