BUSINESS MARKETING - TECHNOLOGY FOCUS
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Lecture 07: Design and Tech Market

Hello, welcome to our next session on B2B marketing, industry marketing, technology marketing, technical marketing, terminologies that we have been using almost interchangeably and in meaning they are slightly different from each other. But for our syllabus, for our sessions, we are using different accents of these terminologies in different sessions. For example, in today's session, by the way, I am Jayanta Chatterjee from IIT Kanpur.

In today's session, we will be discussing the issues related to market research or understanding the market, sizing the market, forecasting the market issues for technologies or technically rich, high technology products and systems.

Before that, in the previous session, we discussed how market research or estimation of the market or study of the market in B2B is quite similar to the way those tasks are performed in conventional marketing or business-to-consumer marketing, topics that are well discussed in our Fundamentals of Marketing and Advanced Concepts of Marketing

courses, Marketing 1 and 2 on the NPTEL platform. I would like to add one point or highlight one point that we briefly discussed in the previous session on market estimation that in business to business marketing or technology marketing or industrial marketing, there are two dominant issues that distinguish the conventional marketing or business marketing with respect to conventional marketing. And those are networks and relationships.

As opposed to conventional marketing that we have discussed in previous courses, in business marketing, in technology marketing, in industrial marketing, we have buyers often performing their tasks in groups called buying centers or group decision-making units on the buying side which are also kind of small networks where different specialists come together for the evaluation and selection of a particular product or product system combination. But similarly, on the Selling side, also there are networks. There are networks of manufacturers and their channel partners and distributors and so on.

So, if you take for example, a large computer manufacturer like IBM or HP or Dell, then you have component suppliers to IBM or Dell. We have subsystem suppliers or assembly, sub-assembly suppliers. And then we have in some cases some software houses who are also working in tandem with HP or Dell or IBM, companies like Microsoft and so on. And then we have distributors or channel partners. We have value added resellers and system integrators.

We have people who handle the online marketing of some of the input products as well as the final product. Companies like Amazon or Flipkart and we have then and then we have the end users. The end users are also in most cases that we are concerned with our businesses and So they also when they do their buying as we just now discussed, they are looking at the issues in groups as small networks. So networks dominate the entire value chain in this business marketing situation.

So, when we want to do market research in this domain, In case of consumer marketing, we can use survey method. We can use focus group method because even though we are dealing with a huge multitude of possible buyers, they can be well segmented with respect to certain characteristics which we use in the segmentation. But in B2B, even

though we are not dealing with multitude of buyers, but we are dealing with multitude of partners or participants in the network. And as a result, when we want to do market research, we have to, as marketers or if we are doing market research from the selling side, we have to do interviews.

We have to solicit pertinent information from a large number of players. They are known but they all have different characteristics and as we discussed in the previous session we may have to go back to them and back and forth number of times because market intelligence is a continuous process in industrial marketing or B2B marketing. And it's a multi-stage process. So we need similar types of inputs multiple times depending on the product as it is evolving in the initial stage or even in the later stage when we are looking at product upgrades, modifications and so on.

So we need many inputs and we need inputs from those people multiple times. So, we have to have good trust-based relations. So that, we have the access to the respondents and we get the right kind of feedback from them and not exasperated feedback. So therefore, trust-based relationships and mutual dependence-based relationship and network. These are some of the concepts that really distinguish business marketing from consumer marketing. In today's session, we are going to focus a bit more on technology enriched products, high technology products, medium technology products and systems, products or goods and service combinations.

In this scenario, market research often presents paradox. Some of these paradoxes we have discussed in previous sessions. One is that customers often find it difficult to articulate their needs. Usually they will be talking about the same product. Their desire will be to get the same product at a lower price, faster, better, lighter and so on.

But they may often not see. And therefore, as a market researcher, you may get blindsided from the emergence of new solutions from adjacent markets or sometimes completely different types of players. We discuss many of these examples in the earlier session. So I will not repeat, but suffice it to say that customers find it difficult to articulate their needs because what they are articulating may not be the kind of insight that you are looking for with respect to the market evolution or technology evolution and

their interaction. So, you have to get inputs as I just now said multiple times and product development process, system development process will be a multi-stage process and therefore the market research also will have to be a multi-stage process.

And therefore, information gathering and information analysis or information interpretation is kind of an involved set of tasks in technology markets.
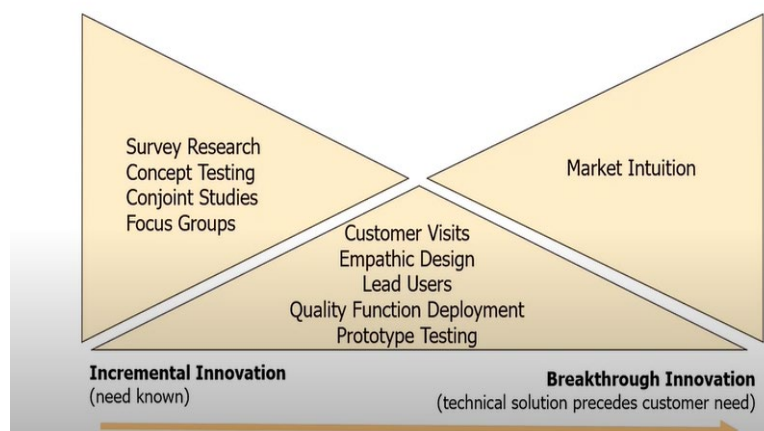
So, this diagram that you see on your screen kind of classifies the different kind of efforts and different kind of tools that are often used in technology markets or high-tech markets in B2B. So, if we look at the horizontal axis, we have on the left side incremental innovation marginal changes of known products and systems and on the right hand side we have breakthrough innovation which are radically new and often therefore may be evolving before the customer demand evolves.

So, we say the technical solution will often precede the customer's need. Need means here articulated or expressed need because as a market researcher, we will discuss the tools where you will be discovering the latent needs or needs which will emerge even before the customers sense or articulate those needs. So, on the left-hand side, we have incremental innovation. We are dealing with known domains.

We are dealing with goods and services, products and systems, where certain models, certain solutions already exist. But there are some developments that have been done, some enhancements that have been done. And we are trying to gather information about the possible market growth because of those enhancements and augmentation. So here, like in conventional marketing, we can use survey research, though the sample size will be limited, but we can use survey research.

But that survey research is often done coupled with interviews and maybe sometimes small group, focus group interactions and observation and discussions. But when we do concept testing for the enhanced product or system, often it is difficult for the customer to express their opinion in a void. So we use various kinds of comparative tools taking few of the attributes at a time. So, there can be multiple sets of comparative judgments with different sets of attributes. One of those we will briefly discuss is the conjoint analysis.

And then, of course, as I mentioned, focus groups, etc., are widely used at this stage, interviews and focus groups. On the extreme right-hand side, we have breakthrough innovation or radically new product or system. There, we do not have any past record. The customer doesn't have a real feel or understanding of what is being proposed. And the market growth is often a sort of complex process here.

When we discuss crossing the chasm issues in a later session, we will see that intuition, market intuition plays a big part. So there are a lot of ways subjective estimates are done by involved players at this stage. And between these two extremes, we have a medium range or medium scale innovations, which are not exactly incremental, not exactly radical kind of a blend, which is the nature of a lot of innovation that we see around. And some of those we will discuss. And for these kind of development, new products, we will use customer visits, lead customer or extreme user surveys, empathic design and QFD or quality function deployment, prototype testing and such methodologies.

So, you can see, therefore, we are dealing here with a multi-stage, multiple methodology situation depending on the technology development level, innovation stage or innovation level.

Gathering Information:
Aligning Market Research with Type of Innovation

Incremental Innovation
- Customers needs generally known
- New-product developments are in alignment with the current market
- Use traditional research techniques

Radical Innovation
- Difficult for customers to evaluate
- Use experts, future scenarios, and guided intuition

So, incremental innovations are where customer needs are generally known. The new product development is in alignment with the current product, current market. So, here the existing product is known, the existing market is known and there are some enhancements or developments that have been done and we are trying to understand that what will be the impact of that on the market, on the numbers emanating from the market.

So, here as we discussed traditional research techniques market research techniques can be used whereas in radical customers are difficult to evaluate because they themselves really can't estimate or get a good hang of the new properties that are evolving. So, here we have this intuitive marketing developed by scenario analysis, future Delphi study, and so on.

Mid-range Innovation
- Techniques based on customer observation, lead users, QFD

It's kind of guided intuition. And in the mid-range innovation, as I said, we will be using lead user, customer observation, ethnographic methods, and tools like QFD.

Traditional Tools of Marketing Research: Concept Testing

A technique that solicits customer feedback to evaluate a company's early-stage product ideas

Customer feedback is used to determine which concepts ought to be further developed

These are some summarization of traditional tools of market research, like concept testing. Here, customer's feedback is used to determine which concept ought to be further developed. We discussed some of the methods like stage gate analysis that we often use in such situations.

Traditional Tools of Marketing Research: Concept Testing

1. **Generate multiple product concepts/ideas**
   a) Observation
   b) Focus groups
   c) Brainstorming
   d) Interviews

2. **Share concepts with sample of customers**
   ◦ Key attributes and benefits described in paragraph form
   ◦ Potential customers rate concepts on dimensions such as trial interest and perceived value

In concept testing of course for these incremental innovations we will often use multiple product concepts or ideas which will be tested through observations of interaction with prototypes, maybe focus groups, maybe brainstorming sessions of customers and developers together, and lots of interviews.

Here, concepts will be shared as paper concepts or computer-based visualization concepts. But very often we will use prototypes, if not working prototypes, but at least prototypes which give a good look and feel to the customer so that the customers can get a reasonably concrete understanding.

There will be these prototypes are often associated with some kind of initial set of descriptions in short form of the different new attributes and benefits emerging from them. And Sometimes some trials may be performed and observed with some trusted customers so that if there are bugs, if there are defects, those can be identified because the developers often have bias and they are not able to see the problems. And the customer, a trusted customer, when he or she tests the new product can often come up with good insights into the future problem areas.

Traditional Tools of Marketing Research:
Concept Testing

3. **Further reduce number of concepts to a manageable set**

   ◦ Representative sample of potential customers assess finalists

These steps are used to reduce the number of options which will be finally pursued for development of the complete solution which will be marketed. And so this sort of

narrowing down the possibilities and evolving the combination of attributes is an interesting step for concept testing and evaluation.

Traditional Tools of Marketing Research:
Conjoint Analysis

Survey research tool
- Statistically predict optimal combination of price and product attributes
- Customer sample makes judgments about preferred combinations
  - Uncovers trade-offs in attributes/features

Used to design product features to improve profitability

Ine this methodology, or rather at this stage, the conjoint analysis is a very useful methodology.

So here what happens is that we look at different combinations of maybe attributes and features and their trade-offs with respect to projected prices.

Traditional Tools of Marketing Research:
Conjoint Analysis

1. **Develop attribute combinations**
   - Use focus groups, interviews, internal expertise

2. **Present each product profile with different attribute combination to customers**
   - Customers evaluate each combination on a rating scale

And we can actually come up with multiple alternatives and we have a good methodology in this process to come up with a final recommendation. So first we developed attribute combinations where we use focus groups, interviews, internal expertise in the development team. And then we present each product profile with different combinations of attributes and prices.

And then we ask customers' opinion. And based on the feedback, we can do some kind of aggregation. And we come up with ratings.

Traditional Tools of Marketing Research:
Conjoint Analysis

Example: Product Profile- GPS Conjoint Study

Accuracy: 10 feet or 50 feet?

Display: Color or black-and-white?

Battery: 12 hours or 32 hours?

Price: $250 or $350?

Product Concept	Accuracy	Battery Life	Display	Price
#1	10 feet	32 hours	Color	$250

16 product profiles possible (2 x 2 x 2 x 2)

Let me take an example. This is an example taken from Professor Lillian's work, Gary Lillian. And I think the book is authored by Lillian and Rangaswamy. So this is a real study that was done of GPS. This is the discrete GPS device. Positioning global positioning system device which are used for navigation and this is the kind of GPS which is was sold as a discrete device in the consumer market, in the consumer technology product market, in the consumer technology product market before many of the GPS functionalities were integrated in the smartphone. But even today, this kind of discrete GPS devices are used as part of cars and trucks and so on.

So suppose we have these options we are playing with or we are examining like accuracy of the positioning 10 feet or 50 feet. Two alternative possibilities are summarized. Display can be color or black and white. Now this particular example is a little old. So at

one time the color or black and white display made a lot of significant cost differentials. Maybe today if the display has become so much more economic, maybe it will always be color. Black and white may not be considered as an option. But when this was done, display color or black and white were another set of alternatives. And battery life, 12 hours or 32 hours. And price, $250 or $350.

So, as you can see, accuracy, we have two options. Display, we have two options. Battery, we have two options. We are examining or evaluating. Price, we have two options that we are examining. So, we have therefore 2 into 2 into 2 into 2, 16 possible product profiles. So, for example, concept one will be accuracy 10 feet, battery life 32 hours, display color, price $250. There may be another combination where accuracy will be 50 feet, battery life will be 32 hours, display will be color, the price may be $350 and so on.

So, there will be 16 different profiles that will be done. And then these, depending on the feedback that we get from the customers in terms of preferences, those are tabulated. Some statistical aggregation is done. And based on that, we can come up with that the best set of feature combination will be accuracy 50 feet display color, battery life 12 hours and price may be 250 dollars. So like that some feedback will be taken and remember as we discussed in these cases the feedback must be taken from if we are trying to sell this GPS solution to a truck manufacturer then we have to take the opinion of different constituents of the decision making unit on the buyer side and all of those views will have to be integrated.

Customer Visit Programs

Systematic program of visiting customers with a cross-functional team to understand customer needs. Used for:

1. New-product development ideas
2. Satisfaction studies
3. New market segment identification

Cross-functional teams
- Engineering, marketing, sales account manager

I'm leaving this at this stage, but by itself, the conjoint analysis can be a much longer discussion. If you are interested in this methodology, you can get a wealth of material on if you just search through the usual search engines from the Internet. And there are good presentations on YouTube available on conjoint analysis. But let me spend a little bit of time on some of the other more qualitative but powerful approaches like for example customer visit.

So, customer visit is done from the marketer's side with a cross-functional team. So that the seller's team, marketer's team and the buyer's side different experts can interact in their domain and all those different interaction results of all those different interactions can then be aggregated.

So, this customer visit program is a very structured and well-planned method of interaction-based information gathering. Very widely used in new product developments or satisfaction studies with customers. Minimum viable product or intermediate solutions that are being tested or often used for new application, new market segment identification. And by cross-functional teams, here we mean from the marketer's side involvement of engineering people, design people, marketing people, sales, account management people and so on.

Customer Visit Programs

Elements of Effective Customer Visit Programs

1. Get engineers in front of customers.
   - Face to face communication
   - Interactive conversation

2. Ensure that the corporate culture embraces the value of the customer visit program.

3. Visit different kinds of customers.
   - Competitor's customers, lost customers, lead users, channel intermediaries, internal personnel
   - Customer councils

So, we are trying to get these various experts in front of the experts on the customer side. We are capturing face to face interaction. These days it is very easy to record with your smartphone these interactions, which can be done quite without any obtrusion. And these interactive conversations are then later on can be reviewed and multiple times and then certain decisions can be extracted from those recordings.

And some subjective prior analysis like the corporate culture of the target organization will be important to evaluate so that you can plan your interactions in a proper manner, whether you will do all at once or through multiple sessions and so on. Also, different kind of customers must be visited. Current customers, competitor's customers, lost customers, lead users, channel partners, intermediaries, also internal personnel within the marketer's organization.

And sometimes, industries like automotive have permanent advisory customer councils where they have members from prominent buying organizations as honored advisors who regularly meet express their opinion on new developments or current deficiencies or current problems for future developments. So customer visit program is a multi-stage, multiple session method.

Customer Visit Programs

Elements of Effective Customer Visit Programs (cont)

4. Visit customers in their own settings: Get out of the conference room!
   - (versus bringing them on-premise for a show)
   - Field research
   - Firsthand knowledge
   - Inclusion of multiple decision makers

5. Conduct programmatic visits.
   - (not ad hoc)

And here it is very important that customers are visited in their own setting. So the slogan here is get out of your own conference room or your own office. And instead of bringing the customers to your location, you go to customer's location. That's a very important method here for the field research.

And the other thing that I just now mentioned also I should highlight again that these visits cannot be ad hoc. They should be very well planned. They should be through prior appointments because we must get some free time from the experts on the customer side or the different other channel partners and others that we are involving in this data gathering.

Empathic Design

Research based on discovering customer needs through observation
- "Empathy" with the user's world
  - Users may be unable to articulate their needs

- Based on anthropology and ethnography
  - Develop deep understanding of user environment, extrapolate into future, imagine future products

Empathic design is a method that has got the interest of both customers as well as marketers because this is today much more evolved as a whole part of a bigger methodology known as design thinking. So, empathic design, we are trying to discover customer needs through observation. Empathy means the ability to put yourself in the customer's shoes to discover the customer's perspective, not look at it from your perspective as a developer, but from the customer's perspective as a user.

Observation becomes very important here and the methodology is often known as the ethnographic methodology coming from the anthropology field where we know that the users may not be able to articulate all their needs and experiences and they may often have conflicting views. So, we will have to sort of live with them in their own circumstance and understand the nuances of problems faced or the barriers to the way current jobs are performed.

So there is a focus or accent on understanding of users environment often some extrapolation of the users environment into the future scenario and lot of discussions which depend on creative thinking with respect to imagining future products.

Empathic Design

What a user does with the product (not what the product can do) drives its success

Types of insights
A. Triggers of Use
B. Customer Pains/Problems
C. New usage situations
D. Customization
E. Intangible Attributes

Of course, there are methods by which these creative thinking processes are implemented. So we have thinking triggered by customer's pains and problems. So we have insights developed through observation of customer's pains and problems, discussion with them and imagining new usage situations, some customization and often discovering some intangible attributes.

A good example is the way first, through empathic design, cutlery, like spoons and forks and knives used during eating by senior citizens, people who may have some trembling hands, people who may be suffering from age-related problems. So they need easy-to-hold cutlery with better grips.

So this company called, I think, OxoGrip, so they developed first cutlery to be used by children because they can't really hold the forks and knives and spoons very properly. So, innovative handles were developed. Innovative shapes were developed. Innovative usage of material gave some new ways of combining features and sizes and weights of this cutlery.

But then that same development led to cutlery for senior citizens, cutlery for children and then they used those understandings and observations through empathy, a whole range of other devices used in kitchen and dining and created a very successful range of products which have been emulated by many subsequent manufacturers around the world which

are kitchen tools and dining cutleries which are attractive, easy to use, easy to hold and quite influenced the design and product types in this domain in general.

5 Steps in Empathic Design

1. **Observation**
   - Who should be observed?
   - Who should do the observing?
   - What behavior should be observed?

2. **Capture the Data**
   - Less focus on words/text; more on visual, auditory, and other sensory cues
   - Via photos, etc.

In Empathic Design, it is very important to evaluate that who we want to observe, who should be observing in what manner. Again, here, trust and comfort are very important issues to consider and what behavior we are trying to observe. When we capture the data, the focus on words or text should be less.

There should be more focus on visual record, audiovisual records. And there should be good perceptive approaches to capturing not only audio-visual but other sensory data like touch or smell. So, lot of usage of cameras and recording devices are popular and it has become quite easy or because of availability of smartphones and so on.

5 Steps in Empathic Design

3. Reflection and Analysis
◦ Identify all customers' possible problems and solutions

4. Brainstorm for Solutions
◦ Transform observations into ideas

5. Develop prototypes of solutions
◦ Tangible representation or role play/ simulation of ideas

So based on the a lot of data that are gathered from the initial observations, reflections and analysis, brainstorming, steps are implemented and then prototypes are developed and prototypes are taken back to the customers for their feedback. And then again, some developments are done. So this concept of minimum viable product is an important concept in implementing this lean approach to empathy-based, design-thinking-based product and market development.

Lead Users

Some customers face needs before a majority of the market place

◦ More extreme needs than typical customers

◦ Benefit by obtaining solutions to their needs sooner rather than later

Lead users tend to innovate their own solutions to their needs
◦ Useful insights for innovation

Sometimes we will deliberately go to extreme users. Sometimes we call them lead users.

These are people who are often using a product very vigorously or they are actually taking the product or solution to perform hard tasks quite intensely. So if we can solve, like I was mentioning about the senior citizens with trembling hands and their usage problems that led to successful development of innovative designs for cutleries and kitchen tools. So these extreme users or lead users can help us develop a range of solution that can then appeal with some variants to the population at large. And it can give us a set of innovation for different types of users and different segments.

Lead Users

Uses information from leading edges of a market
◦ Extreme forms of problems

Lead users may *not* be within usual customer base

Systematic process to collect information (see next slide)

The lead users sometimes may not be even from the usual customer base. We may take inputs from users in an adjacent market. So a computer maker looking at the innovation of new user interfaces may go to the adjoining market of electronic entertainment devices like that of televisions or other audio-visual devices and can take the inputs from there which can be then integrated into the development of new display devices or new interfaces.

So, that's how actually many of the hardware and software developments have happened in the information appliance field. So this ethnographic methods, lead user observation method have been used by product developers who are anthropologists by their original expertise in case of mobile phone quite extensively over for last so many years.

QFD: Multistage Process

1. Collect the "voice of the customer"
° Identify customer needs regarding desired product benefits via customer visits or empathic design
° Weight or prioritize desired benefits/attributes

2. Collect customer perceptions of competitive products
° Identify gaps or opportunities in the market

So, another method that we will discuss which kind of evolves from the user feedback process and that is called the quality function deployment or QFD. Here we are actually trying to see how the voice of the customer can be converted into product features and product attribute sets. So here what we do is we combine the what and how of products. So what we first capture what are the needs of the customer.

What problems the customer is trying to address through the use of the product service or combination. What tasks the customer wants to perform. What are the pains currently faced with existing solutions. And then on the so this different what issues we put in a summarized form usually maximum we clustered them and take up maximum 7, 5 to 7 issues what issues on the vertical axis and on the horizontal axis we put the how or solution oriented projections that means suppose we want a pencil where the stylus will be lasting for a long time.

So, a lead pencil where the lead will not wear out very soon or should not result into smudging or lead dusts falling on the paper. These are coming from the requirements or what issues of the customer. And then we will look at how those customer desires can be met by kind of developments and those we will put on the horizontal, on the how. And these two sets can be combined and then some internal comparisons can be made of the relative weights of the solutions that are emerging.

And that can help us to come up with a final combination that will identify the best way to meet the gap or opportunity in the market.

QFD: Multistage Process

3. Transform data into design requirements:

° "Customer requirements deployment"- identify product attributes that will meet customer needs

° "House of quality"- a planning approach that links customer requirements, design parameters and competitive data.

So basically, QFD is a process, multistage process to convert the voice of the customer into design requirements and then into a final solution. So, sometimes it is called the house of quality because this vertical set of what issues and the horizontal set of how those what requirements will be met together form the one site like the three walls and then the internal comparison forms like the roof and this structure is sometimes called the house of quality. I recommend that again if you are more interested in the QFD process, you can find a wealth of easy to use methods, even some software on the net through the usual search engines.

QFD—Using the Kano Concept
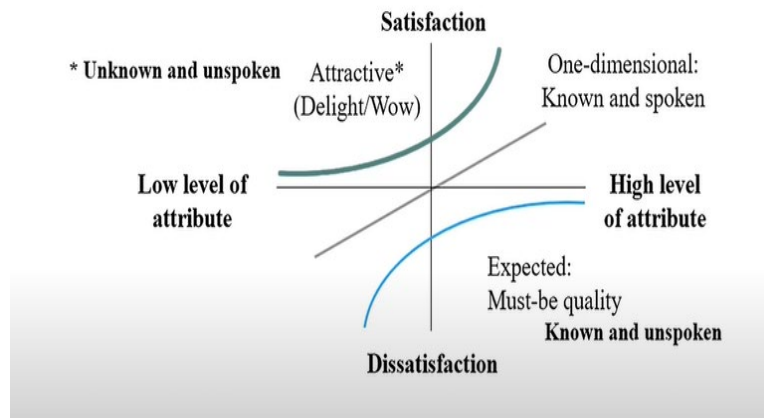
I will conclude with the introduction of the Kano concept, which goes hand in hand with QFD. In the Kano concept, Professor Kano introduced this simple but profound observation that not all requirements of the customer are of the same nature. So, for example, if we are looking at the design of a good handle of a device like we were discussing the OxoGrip case study of developing easy-to-use, user-friendly cutleries for senior citizens or for children.

So, if there is one good soft grip handle, that is an absolute must have requirement and that's the kind of requirement like if you are designing a building for an institution then there should be gents and ladies toilets at each floor or for a certain set of rooms now if there are many rooms classrooms in a college then maybe two sets of toilets will be desired. But then if you provide five sets of toilets, then that will become an overkill and you are actually putting your resources into a design feature which is no longer of much appeal to the user or customer. So this is where these are solutions which we must have.

But at a certain stage, the solution saturates and providing more will no longer be of any importance. It will be actually a waste of resources. So these kind of customer requirements follow this asymptotic graph where they rise rapidly with the provision of the solution. So that means if the solution is absent, then the customer will be highly dissatisfied. If there are no toilets in a college building at each floor, then it leads to dissatisfaction.

But providing five toilets will not give more and more satisfaction. So it rises and then it saturates. So from the dissatisfaction to satisfaction as it is rising, the y-axis, after a certain time it saturates, prices saturates. But if you take something like speed or price or weight, here there is no end to the customer's satisfaction or desire because we want lesser and lesser and lesser prices for everything as buyers. We want faster and faster and faster devices.

We want lighter and lighter and lighter products. We want often smaller and smaller and smaller solutions. So these are what we call one-dimensional. That means the more, the merrier. And then there are certain other kinds of requirements of customers.

These are very interesting because here the customers can live with absence of the solution or a low level of availability of the solution. But if you provide more or if you provide a solution, then it can lead to customer's delight. So these are called attractive solutions or wow factor discovery paths. So from low level to high level, it can lead from acceptance to delight. So we have these three types of customer requirements proposed by Professor Kano.

And when we look at the QFD, then we must therefore make a combination. We must definitely have the sets related to must-have. And then we must have the way to discover these attractive or delight or wow factors. And then we must also understand that which requirements are one-dimensional. So this is again a, there is a very easy to use but very powerful methodology detailed way of constructing questionnaires in the Kano method.

QFD—Using the Kano Concept

▸ One-dimensional attributes
　　○ Known and voiced by customer
　　○ Linearly related to customer satisfaction

Again, it is very simple to use but very useful and powerful. There are good websites connected with the Kano method with lots of presentations and audio visual guides again people who are more interested in these methodology can find a wealth of material on the net.

So, I will end this session here and we will continue our discussion with about market estimation and market research in the technology rich domain in the high technology product and service domain in the next session. We will continue our deliberation.

Thank you.