



Experiment 7

Have Coffee with Customers

Start impromptu conversations with a group of customers while they visit your branch. This is a great way to learn about their experience without getting into the logistics of a formal

focus group. Before planning formal field research, it's often helpful to start a customer experience immersion with an informal activity such as this.

STEPS

1

Set up a day to work in a branch. If possible, work in a public place in view of customers. Invite a few for coffee while they wait. Introduce yourself and ask why they're visiting the branch that day, what particular product or offering they're interested in or use, and what challenges they face.

2

Once you establish rapport and confidence, sensitively ask more about their lives: household and family situation, employment, needs and goals, how they expect financial services to help them.

3

Jot down your observations and insights from interactions in your notebook. After a few (individual or group) conversations, you'll probably identify some similarities across customers:

- Describe three common themes that came up during the process
- Share with your team, ideally during "Daily Conversations about Customer Experience."

TIME

30-40 minutes per conversation
(gather responses for a week)

ROLES

1 facilitator
1 note taker

MATERIALS

Coffee
DIY Mind Map
Notebook

USE IT WHEN

- You want to gain inspiration and insights from your core customer base
- You want to test new ideas early on with random customers at a branch
- In the beginning of your project, before you get into the research planning phase, to collect data and get more direction on questions you need to ask

USE IT TO

- Collect data that can validate or re-frame your initial assumptions of customer challenges with your product

"Understand your customers. Talking to them is one thing, but if you go in looking to answer a specific question, you won't find out the whole character of them. Try to understand them – their beliefs, their needs, their relationships. Even if you are just serving one aspect of their financial life, try to understand them wholly, because it will give you a lot of ideas of how to build value into the product you are providing to them." Ginger Baker, Square, San Francisco