Relentless Customer Focus

[Assessing and Improving your customer-centered product organization]

What it's about

This book is for leaders in companies that prioritize their customers. It helps you evaluate your organization, identify obstacles to customer focus and ensure your product teams create successful, valuable products that drive customer loyalty.

The core idea is that a company grows by creating and selling products that customers truly value and are willing to pay for, so focusing relentlessly on customers will help you deliver that.

Who it's for:

Executives and product team leaders who want to build a customer-focused organization and empower their teams to deliver real value, leading to business success.

Book Content

Chapter 1: Introduction

“I’ve been tasked with leading a transformation at our company to help us be more customer-centric. We are dedicated, but inconsistent today. Where do I start?” --I’ve heard this from leaders of large and mid-sized companies for years, since working at a company called Intuit, where I had the opportunity to co-lead a transformation that drove significant company growth and introduced innovations that improved customers’ financial lives.

In 2007, Intuit’s stock had stagnated, and innovation was limited. However, the company was full of talented and dedicated people. The leadership—first Steve Bennett and later Brad Smith—believed Intuit could be a company fueled by innovation and growth. But at the time, product development focused mainly on small, incremental improvements. A major shift was needed.

Through experimentation, effort, and strong leadership support, we changed the company culture to put customers at the center of everything we did—not just caring about them, but deeply understanding their problems and working tirelessly to solve them. We called this approach "deep customer empathy," and it was part of our “Design for Delight” design thinking initiative. This shift led to new products, a surge of innovation, and a thriving company culture. As a result, Intuit’s stock, which had been flat for over a decade, took off. Employees learned to use direct customer interactions to improve their work, boosting revenue and customer loyalty. The company also became more agile and better at adopting new technologies that added value for customers.

This period was an exciting time for change. Eventually, other companies started looking to Intuit for guidance on becoming more customer-focused themselves.

Many organizations aspire to be innovative and customer-centric, but daily challenges—compromises, debates, and internal distractions—often get in the way. Instead of creating something outstanding that customers love and are willing to pay for, companies often end up with something mediocre. This is frustrating but common, in business and in life. To overcome these challenges, it is critical to be relentless, and consistent.

Being consistent is hard, but it pays off.

Here is a personal example: I aspired to be a runner for years but never stuck with it—until nine years ago, when I made it a consistent habit. I now run three to four times weekly, no matter the circumstances. Some runs are great, some are tough, but I keep going. Even when recovering from an injury, I walk until I can run again. The key to success wasn't motivation—it was consistency.

The same principle applies to building a customer-centered company. At Intuit, I worked with teams that consistently prioritized customer interactions. Amazon calls this being "customer-obsessed," a term Intuit later adopted as well. It serves as a reminder that past success isn't enough—staying customer-focused requires ongoing effort.

Although I'm no longer at Intuit, I still work with other companies and leaders who are trying to transform their organizations to be more customer-centric. A key question is always: What does "customer-centered" really mean to them? One thing is clear—true customer focus isn't just a mission statement; it's reflected in consistent actions.

That means regularly spending time with customers—talking to them, observing them, gathering feedback, and fostering curiosity about their needs. Organizations, teams, and leaders all play a role in making this a habit.

The bottom line: The most important factor in becoming a truly customer-focused organization is consistency.

What Does Consistency Look Like in a Customer-Centered Organization?

Through conversations with product leaders, design leaders, executives and HR teams, I often hear similar frustrations about how teams function—or struggle to. Common concerns include inefficiency, internal conflicts, misalignment on priorities, resistance to change and low morale. Many employees feel overworked, pressured to meet deadlines without proper research or experimentation, and stuck in environments that don't support their well-being. Meanwhile, managers are frustrated by slow progress and the need for constant oversight.

Despite these challenges, companies continue to operate, employees earn good salaries and successful projects do happen. Some teams manage to foster strong cultures and create impactful products, proving that a better way is possible.

One major issue I see is a misunderstanding of a product team's role. A product team's job isn't just to build and deliver solutions—it's to solve customer problems in a way that adds value to the company. True customer-centered organizations focus on deeply understanding their customers and meeting their needs, which leads to loyalty, repeat business and long-term success. Think of companies like Apple, which doesn't just have customers—it has fans who eagerly embrace new products.

For this to happen, teams must work together effectively. They need clarity on their purpose, alignment on their goals and accountability for results—not just for individual tasks but for the overall impact. They also need the freedom and leadership support to make the right decisions.

I've seen organizations successfully transform their cultures, leading to more effective teams, happier employees and better business outcomes. Over time, I developed an approach to diagnosing and addressing common business challenges—one rooted in the fundamentals of entrepreneurship and human interaction.

This book isn't about convincing you to change or presenting academic theories. Instead, it's a practical tool to help you identify and solve common organizational problems. Think of it as a compass to guide you toward a truly customer-centered organization, showing you where you're on track and where adjustments are needed.

About This Book

This book is based on my experiences, observations, and conversations with thousands of leaders and team members over the past 30 years.

Key Assumptions

I'm assuming the following apply to you:

- Your customers generate revenue for your business, whether they are individuals, businesses, government agencies or nonprofits.

- Your company operates for profit, though nonprofits may still find parts of this book useful.
- Your company offers at least one product or service for customers to buy.
- You have teams, small or large, responsible for building these products or services.
- You rely on employees to create successful products.
- You want loyal customers who buy more and recommend your offerings to others.
- You have a role in ensuring your company's success and growth. At the very least, you're an employee.

If you're in a funded startup, this book may serve more as a guide for structuring your approach rather than as immediate direction.

A Customer-Centered Compass

Throughout this book, we will take a look through different lenses to see if behaviors correspond to the expectations we have for a customer-focused organization. Although you may have your own perspectives on what this could look like, here is a proposal for how a customer-centered organization might behave.

- The company prioritizes customers in all decisions.
- Leaders promote a customer-focused mindset.
- Teams make choices based on customer needs.
- Products are designed to provide clear value to customers.
- Customers are always the central focus.

As you go through the book and assess different areas of your organization, we will be using this compass as a guide.

The Destination: A Fully Customer-Focused Organization

Being customer-focused isn't just about what you do—it's about where you're going. In a customer-centered organization, you'll notice that:

- Every team member deeply understands the customer's needs, motivations and challenges.
- The company continuously improves the customer experience, solving or preventing issues.
- Everyone aligns on solving meaningful customer problems—problems customers are willing to pay to fix.
- Work isn't done until the customer's problem is truly resolved.

Staying on Track

If teams lose focus, they need to realign with these principles to keep moving in the right direction.

Understanding Where You Stand Today

Before making any changes—or ensuring you don't change the things that are working—you need to understand your current situation. That's the focus of this book.

As Dan Heath explains in *Reset*[1], the first step is to "go see the work." In other words, observe reality firsthand. This book will guide you on where to look, what to notice, and how to identify strengths and challenges. It will help you map out the systems that support or hinder your efforts to build a customer-centered organization. Beyond just assessment, it will also offer guidance on addressing issues and empowering teams to take ownership.

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[1] Heath, D. (2025). *Reset: How to Change What's Not Working.* New York: Avid Reader Press.

This book is about figuring out where you are, recognizing when you’re off track, and finding a way forward. The approach relies on direct observation, conversations, surveys, and other tools. As a leader, it's essential to assess things with a fresh perspective rather than relying only on team reports, which may be unintentionally biased. Just as you would with customers, maintaining regular interactions and deep empathy with your team is key.

The book is structured into six parts, each focusing on a key area:

- The Organization as a Whole (The Company)
- Leadership
- Product Teams
- The Products Themselves
- Measuring Progress
- Resources for Staying on Track

Each section includes key questions, assessments, and suggested actions based on the results. To help you determine where your organization currently stands, I have outlined five levels of customer focus:

- Level 1: Adrift – Decisions are made without considering customers.

- Level 2: Off-Course – The focus is on products, with customers as an afterthought.

- Level 3: Navigating – Customer insights are used but not consistently prioritized.

- Level 4: On-Course – Customer needs guide many business decisions.

- Level 5: Full Speed Ahead – Customer focus is embedded throughout the organization.

With each chapter, you can assess your current level and explore ways to advance toward a stronger customer-centered approach.

Chapter 2: Understanding the Company Environment

A customer-focused company always keeps customer value at the core of its decisions and actions. To determine if a company truly operates this way, we can look at the broader organizational environment that supports—or hinders—teams in focusing on the customer.

What does your company “say”?

Start by looking at three key areas that reveal whether the company genuinely supports customer-focused work:

Does the company prioritize being customer-centered?
When a company clearly values customer focus, teams have a strong reason to prioritize customer needs—even when other business demands compete for attention. Business goals may set boundaries, but the overall direction should still support customer value.

What are the company’s mission, vision and values?
If these foundational statements emphasize the customer, that’s a strong signal that customer focus matters across the organization. A company’s mission should reflect why it exists—not just its goal to make money. For example, a mission like “Be the top provider of X” is business-focused, even if it sounds ambitious. In contrast, a mission that focuses on improving customers’ lives shows a clear customer-centered intent.

A real-world example: Intuit’s mission evolved from “improving people’s lives” to “improving people’s financial lives,” and later to “Powering prosperity around the world.” Each version emphasized helping customers, not just growing the company.

Is there a gap between what the company says and what it does?
It’s one thing to state a customer-centered mission; it’s another to act on it. If a company’s behavior doesn’t match its

stated values, teams will naturally follow what the company does, not what it says. That's why it's important to evaluate both the official messaging and the actual actions.

What messages are leaders sending to employees and shareholders about the company's priorities?

For a company to succeed, it must clearly prioritize delivering value to customers—after all, customers drive revenue by choosing to buy, stay loyal and spread the word. If leadership instead focuses on things like cutting costs without emphasizing customer value, employees will naturally shift their attention to those areas.

Even when customer focus is discussed as a priority, if leaders don't check whether teams are actually acting on it, they may be surprised to find that it's not happening.

For example, when I worked at Intuit, our CEO, Brad Smith, assumed that customer visits were a regular practice—even among senior leaders. But in a meeting, he asked his team what they had learned from recent customer visits, and no one had an answer. Many hadn't visited a customer at all. Once he realized this, he quickly took action by organizing visits for his team with trained coaches to help them use customer-focused methods like design thinking. It wasn't until he noticed the gap between intention and behavior that he was able to correct it.

To stay aligned, leaders need good data. Setting clear metrics and reviewing them regularly helps keep the company focused and accountable.

What gets recognized and rewarded across the company?

People tend to focus on what gets acknowledged. When being customer-focused is actively recognized and rewarded, employees are more likely to make it a priority.

As the saying goes, "What gets measured gets done. What gets measured and fed back gets done well. What gets rewarded gets repeated." When we track our goals and make adjustments along the way, we stay on course.

Here's a personal example: About eight years ago, I trained for a half marathon. I hadn't run in years, but having a clear goal and tracking my progress—alongside a friend—helped me stay consistent. Even when I had to switch to an elliptical, I kept tracking. Seeing each other's activity pushed us to keep going. That visibility was key to our success.

Yet in product development—and especially in customer focus—we often don't apply that same approach. We may measure easy-to-track outputs like deadlines but not deeper insights or customer impact. As a result, our customer-focused efforts become invisible or undervalued.

Here are a few reflection questions:

- What systems exist to recognize and reward employees and teams?
- Are there any specific programs celebrating customer-centered work?
- Do company meetings or all-hands highlight customer success stories?

Are there resources and operational mechanisms that support a customer-centered approach?

Some companies offer dedicated teams or tools to help other teams connect with customers for learning, building empathy and testing ideas. This might include a research operations team or a budget specifically for finding and compensating customers who participate in research. If these resources aren't available companywide, each team has to secure its own funding and support, which can make it harder to focus on the customer.

Are there any broader organizational barriers?

Even if a company emphasizes being customer-centered, deeper, systemic challenges may make it hard for teams to fully adopt this approach. Examples include a lack of psychological safety, leadership misalignment, a company culture that discourages speaking up (especially across levels of seniority), or policies and regulations that conflict with putting the customer first.

Evaluate The Company

Answer the following questions, rating your answer from 0 to 5.

Assessment Question	0 No	1	2	3	4	5 Yes	Comments
Is your company's mission customer-focused?							🚩If not, it might make it difficult to be customer centered 😀If yes, this is a good sign that your company can be customer centered
Is your company's vision customer-focused?							
Do you have explicit customer-focused values?							If you do have at least one customer-focused value, check to see if people know that value and how they are living it.
Are the stated objectives and priorities for the company customer-centered?							Examples of priorities that might be customer centered: ● Increase the number of active users ● Increase revenues through organic growth ● Foster customer loyalty
Are the customer-centered objectives and priorities measured, tracked and shared?							This could be a roll-up of customer-centered metrics from the teams level (see Chapter 4).

Is your company free of systemic organizational biases?							These biases may vary across the organization, or stem from challenges from the broader organization. Be sure to identify the specific systemic issues that are present.

Total Score _____________

Average Score __________

Company-Level Navigation Status

Based on your evaluation, here is how to determine your Company-Level navigation status:

- **Adrift** (1-1.9 average score) → The company does not provide the organization with any indication that prioritizing customers is important, creating an atmosphere where focusing on customers may be risky or dangerous. Needs a complete transformation.
- **Off Course** (2-2.9 average score) → the company gives some indication that customers matter, but customer focus is inconsistent. This may create an atmosphere where customer-focus is seen as an aspiration rather than a mandate. Needs strategic realignment.
- **Navigating** (3-3.9 average score) → The company is signaling the importance of customer-focus, but there is still inconsistency that could be confusing. It might not always be clear that prioritizing the customer is called for. Needs targeted improvements.
- **On Course** (4-4.4 average score) → The company is signaling to employees and stakeholders that it is customer-centered but needs fine-tuning in a few areas.
- **Full Speed Ahead** (4.5-5 average score) → The environment the organization has created is ripe for customer-centric activity and should focus on innovation and continuous learning.

Sharpening Your Company's Customer Focus

Review your company's overall approach to customers and address any gaps—for example, whether there's a clear customer-focused vision and set goals. If these are in place but not well communicated or tracked by leadership, share your findings with them. You might also compare your company's approach with competitors' to highlight strengths or spark interest.

Take a closer look at your teams (see Chapter 4) to find success stories where putting customers first led to great results. Highlighting these examples can inspire others and build momentum for broader impact.

Chapter 3: Assessing Leadership

As a leader in a growth-focused organization with clear goals and customer-centric teams, your influence can either support or slow down progress. Even when the organization values customer focus and the team knows its direction, your actions as a leader help reinforce what really matters — and that can make or break a team's success.

I once facilitated a discovery planning session with a strong, customer-focused product team. Their task was to solve a key customer problem that aligned with broader company goals. Early on, I noticed the team had different ideas about what "success" looked like. So, I paused the session and asked them to break into small groups. I had each group write down what they thought success would look like and what it should look like.

Two themes emerged: One group saw success as creating a big, impactful solution for the customer — an "aspirational win." The other group focused on getting something out fast so they could learn from real-world feedback — a "tactical win." Both were valid approaches, but they required different strategies, timelines and levels of risk tolerance. The team was stuck because these two visions were pulling them in opposite directions.

The product manager assumed everyone was aligned on the aspirational goal and brought in two senior leaders to clarify. First, the general manager encouraged the team to aim high and take the time to solve a meaningful customer problem. The room lit up with energy and excitement. Then, the engineering VP came in and told them they needed to deliver something within four weeks. The energy dropped instantly.

The core issue was a lack of alignment at the leadership level, and the team couldn't move forward without a clear direction. In this situation — where the team was new, the customer was known, but the problem wasn't — I believe the general manager had the right approach. With the right structure, like quick design sprints, the team could explore solutions fast. But first, they needed clarity on the customer problem.

Are You Leading Like a Dictator or a Coach? (Aim to Be a Coach)

Teams struggle to stay focused and adaptable when their leader acts like a dictator—telling them exactly what to do. There's a big difference between guiding a team toward a goal and controlling every step they take. As a leader of an empowered, customer-focused team, your role is to clearly communicate the outcomes you want and give the team the space to decide how to get there.

A coach:

- Asks thoughtful questions
- Supports and encourages the team
- Promotes curiosity
- Helps clarify goals
- Builds a sense of ownership and empowerment

A dictator:

- Issues commands
- Criticizes the team
- Leads with fear
- Dictates every step
- Leaves the team feeling powerless

I've seen many teams come up with great ways to deliver value to customers—only to have their ideas dismissed because they didn't align with their leader's preferences. While your experience and perspective are valuable, decision-making should stay with the team.

Leading like a coach is more effective. You influence the team without taking over, so they take real ownership of their work. When teams truly understand the customer problem and feel passionate about solving it, they'll go above and beyond. If they aren't engaged, that's a separate challenge—but one you can help with as a coach.

Instead of telling them what to do, ask what they think could work. Instead of giving them your solution, share similar experiences they can learn from. Help guide the conversation rather than making the decision for them. When you take over, even with good intentions, the team may stop feeling responsible for the results.

> As leadership coach Marshall Goldsmith puts it:
> "If successful people feel they are being encouraged and supported, they are much more likely to keep trying and achieve positive, long-term behavioral change. If they feel they are being judged or manipulated, they tend to become hostile to the process and quit trying."

If other leaders are also working with this team, talk with them. Understand what they're trying to achieve and how they approach working with the team. Make sure you're all aligned on the team's goals. And if you can, observe how they interact with the team—it can give you helpful insights.

Are You Helping Your Team Stay Focused on the Customer?

The questions you ask can shape what your team pays attention to. If you want them to prioritize the customer, make sure your questions reflect that—focus on the customer's needs, the problems they're facing, and how your team is helping solve them.

As Simon Sinek says, "The quality of a leader cannot be judged by the answers he gives, but by the questions he asks."

Are You Leading by Example?

If you expect your team to engage with customers regularly, are you doing the same? And when you do, do you share what you learn?

Early in my career, I joined a team visiting a customer to understand how they used one of our product features. I mostly observed during the visit, but toward the end, I asked the customer to show me how she used the feature. She brought us into another room with her computer, where she walked us through her process, including handwritten notes she used to remember each step.

That one question—“Can you show me how you do that?”—led to deeper insights than we got from the initial conversation. The team realized the value of observing customer behavior directly and adjusted their approach to research. That change helped them uncover better insights and improve the customer experience. And they carried that lesson forward in their careers.

Takeaway: As a leader, your actions set the tone. Modeling behaviors like customer observation can be more powerful than just encouraging others to do it. Join your team on customer visits. Let them lead while you watch and offer guidance afterward. Or simply show them what you’d like to see—asking a customer to “show me” can open the door to valuable insights.

Are You Keeping Customer Impact Front and Center?

As a leader, you're juggling responsibilities—to the business, your team, your own growth and your customers. It's natural for some things to feel more urgent than others. But it’s important not to lose sight of what matters most: delivering real value to customers.

If we’re not creating value for them, everything else falls apart. That’s why customer impact should be your top priority. Help your team stay focused on initiatives that make a real difference, even if they’re not the most urgent tasks on the list.

Are You Helping Your Team Succeed?

Being a supportive leader means asking the right questions and setting a strong example. If your teams are working independently—great! But they may still hit roadblocks that stop them from delivering value. That’s where you come in.

Since you're already checking in regularly, you’ll likely spot these barriers early. Some might be internal, like limiting beliefs or mindset issues. Others may be bigger organizational challenges or conflicts with other teams. This is where your leadership can really make a difference.

Start by understanding the problem. Ask what they’ve tried so far. Whenever possible, let them lead the way, but offer guidance and support as needed.

If there's a conflict with another team or leader, step in to help align priorities and find a way forward. Make sure processes and tools are actually helping—not hindering—the team’s progress.

For example, if they’re stuck waiting on access to an important tool, look into the holdup and help resolve it quickly. Your influence can often move things faster than the team can on their own. You can also help them explore workarounds to keep things moving.

If they say they're short on resources, dig a bit deeper—it could be a real issue, or it might point to something else, like a skills gap or unclear priorities. Help them figure out what’s really going on, and support them in finding smart, creative solutions. And if they do genuinely need more resources, do what you can to make it happen.

Are Other Team Leaders Helping Teams Succeed?

If you’re not the only person leading the team, take time to identify who else plays a leadership role. Talk with them to understand what problems they’re working on and how they approach leading the team. To avoid confusion or mixed messages, make sure you're all on the same page about the team's goals and what success looks like.

Pay attention to how they interact with the team. If they’re mainly giving instructions, they might be unintentionally limiting the team’s ownership. But if they’re asking thoughtful questions and guiding the team, they’re likely taking a coaching approach — which helps the team grow and succeed.

Evaluate Leadership

Answer the following questions, rating your answer from 0 to 5.

Assessment Question	0 No	1	2	3	4	5 Yes	Comments
If you are a leader, Reflect on your interactions with the team, are you acting more like a coach than a dictator?							Tip: Ask the team to assess you, or have a 3rd party observe you and assess you. Do they see behaviors that suggest that you are being more of a dictator than a coach? (Sometimes we just don't see things that others can see).
Look across all of the leaders working with a team. Are they aligned with each other?							
Are all of the (other) leaders acting like a coach?							

Are you (and other leaders) asking customer-focused questions?							
Are leaders modeling customer-centered behaviors?							
Are leaders prioritizing customer impact?							Take a look at where activities ARE happening. If urgency alone is the deciding factor for what is being worked on, you aren't acting consistently with being customer-focused, and you might be putting the company's long-term success at risk.
Are leaders aware and actively trying to help teams overcome barriers to progress?							
Are leaders actively encouraging teams to experiment and learn?							

Are leaders regularly celebrating successes and lessons from failures?							
Are leaders finding opportunities to develop skills in team members?							

Total Score _____________

Average Score __________

Leadership Navigation Status

Based on your evaluation, here is how to determine your leadership navigation status:

- **Adrift** (1-1.9 average score) → Leaders are not empowering teams to focus on customers, and might be blocking progress. Needs a leadership improvement plan, including mentoring, training and coaching.
- **Off Course** (2-2.9 average score) → Some leadership efforts exist, but customer focus is inconsistent. Needs strategic realignment.
- **Navigating** (3-3.9 average score) → Leadership is making progress but may still have blind spots. Needs targeted improvements.
- **On Course** (4-4.4 average score) → The leadership is strongly focused on helping teams be customer-focused but needs fine-tuning in a few areas.
- **Full Speed Ahead** (4.5-5 average score) → The leadership is fully supportive of customer-centric teams and should focus on innovation and continuous learning.

Strengthen your customer-centered leadership

Keep Your Team Focused on the Customer: 5 Questions to Ask Regularly

To help your product teams stay customer-focused, ask these five key questions regularly:

What outcome are you aiming for?
This helps clarify whether the team is focused on a real impact (an outcome) or just completing tasks (outputs). Look for goals that describe a change or improvement—not just deliverables or timelines. If they give you a task as the answer, ask why it matters and how they'll know it made a difference.

What problem are you solving?
This checks whether they're addressing a customer need. If they mention an internal goal, such as lowering costs, dig

deeper to connect it to a customer issue. Make sure they understand the customer's pain point and the value they're providing.

Who are you solving it for?
This reveals whether they have a clear picture of the customer. Look for a specific and well-defined customer group. They should be able to explain why this group matters and how they know the problem is important to them.
⚠️ Be cautious if the answer is just "because a leader said so"—it could mean the team isn't starting with the customer.

What have you learned so far?
This checks if the team is learning from customer feedback and testing their ideas. If they can't name anything they've learned, it may mean they aren't engaging with customers or validating assumptions. Encourage them to explore what they still need to learn or test.

What do you need?
This question helps you understand how to best support the team. They might need resources, help navigating roadblocks, or backing in conversations with other leaders. Listen for what they truly need—sometimes it's clarity or decision-making support more than anything else. Be a coach. Help where needed, but encourage them to take ownership, too.

Encourage a Growth Mindset in Your Team

The word "yet" can be powerful. If your team hasn't figured something out—like the customer's problem, how to deliver value or how to work well together—adding "yet" shows you believe they can get there. It reflects a growth mindset.

Here's how to support a growth mindset in your team:

1. **Encourage Learning Through Experimentation**
   Ask your team what they've tried and what they've learned. If they believe something might work, suggest small, quick experiments to test their ideas before investing too much time. This approach helps them move faster and avoid big mistakes by learning early.

2. **Celebrate Both Wins and Learnings From Mistakes**
   Recognize both successes and the lessons learned when things don't go as planned—especially when working on new, innovative ideas. This reinforces that learning is valuable and helps avoid repeating mistakes.

3. **Create Opportunities for Skill Growth**
   Helping team members build new skills not only improves their work but also boosts their confidence and career growth. Look for ways to support their development so they can create value more effectively.

Chapter 4: Assessing Product Teams

The real value a company offers comes from the products and services its employees deliver to customers. I'm specifically talking about the employees who work in product teams to create those solutions.

Product teams can look different depending on the company, but in digital organizations, they usually include three key roles: product management, development and design. Each role brings something important to the table, but to be truly effective, they need to work together smoothly. Marty Cagan[2] has great insights on how to build and support these kinds of teams.

These teams are responsible for delivering value to customers—this is what drives the company's revenue. For that to happen, the team must work well together, just like a sports team. Everyone needs to understand and align around a shared goal. If players on a team each have different objectives, they're unlikely to win. In baseball, for instance, everyone might contribute in different ways, but the main goal is the same: score more runs than the opponent.

For product teams, "winning" isn't just about releasing something by a certain date. While some teams use a launch date as their goal, that doesn't guarantee the product will actually solve a customer problem. If it doesn't, the effort is wasted. Instead, the focus should be on delivering value to the customer by that date. As Kaaren Hanson, former CXO at JPMorgan Chase, put it: Aim for "great, not date."

That said, deadlines can matter—especially in industries like tax software. TurboTax, for example, needs to be ready by January so customers can file taxes on time. But it's not enough to simply launch on time—it has to work well and provide real value. Teams there might also aim to make filing faster and more accurate.

The key takeaway: Everyone on the team should be aligned around the same customer-focused goal.

For a product to truly be valuable, it has to solve a real problem for the customer—something that's getting in the way of what they're trying to achieve. For example, if a customer using TurboTax can't find their 1099-INT form, they can't finish

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[2]Cagan, M. & Jones, C (2020). Empowered: Ordinary People, Extraordinary Products. Wiley

their taxes. Years ago, this was a common issue. Today, teams have solved it by letting customers pull that data directly from their bank. That solution came from deeply understanding the problem.

When teams are clear on the customer problem, they have a stronger sense of purpose and focus. They're more likely to stay open to new ideas, test things early and adapt as needed—leading to better solutions in the end.

That's why it's important to ask: Are your product teams truly focused on customer needs and delivering value?

In many companies, teams are formed around products or features, not customer problems. This makes innovation harder because teams can get stuck adding features instead of solving real issues. This becomes even more complex in large products where different teams own small parts. Much of their time ends up being spent coordinating with others.

Frequent reorganizations only make this tougher. When teams are reshuffled, it's worth asking: Is this change helping us focus more on customer problems, or just addressing internal challenges?

Ideally, product teams should be formed around specific customer problems and given the freedom to solve them in the best way possible.

How Do You Identify and Understand Customer Problems?

It can be tricky—like a chicken-and-egg situation. To build teams focused on solving customer problems, you first need a clear understanding of what the problem is and who is experiencing it. There are a few ways to figure this out:

1. **Let the Product Team Lead the Way**
   Assign your product team to make a certain type of customer or customer group more successful. Their first step is to research and uncover the key problem that needs solving.

   To guide their research, they should answer these four questions:

   - **Who are the customers?**
     It is not everyone. Narrowing the focus to a specific group—based on how they behave and what they care

about, not just demographics—makes it easier to define and solve a meaningful problem.
Examples: Parents of high school seniors feeling anxious about their kids leaving home. Coffee lovers who regularly seek out the best local brews.

- **What do they want?**
- **What is standing in their way?**
- **What can we do to help?**

2. **Create a Separate Team Focused on Customer Problems**
   You can also have a dedicated team whose job is to understand and identify high-impact customer problems—ones that align with the company's mission and goals. This team takes a strategic view but stays grounded in real customer needs and experiences.

   Once they have clearly defined a problem, a product team can be formed to dive deeper, do more research, and work on solving it.

Is the Team Aligned on a Common Purpose?

Teams are formed to achieve something specific. For product teams, that usually means building something valuable that customers will want to use or buy.

But sometimes different team members have different ideas about what that goal is. That misalignment can lead to problems. One of the first things to check is whether everyone on the team shares the same purpose.

Here are some questions to help figure that out:

- What is the team trying to achieve? Is it focused on solving a meaningful customer problem or creating real value for customers?
- How do they know what problem to solve? Have they seen customers struggling with it firsthand?

A team's purpose can be defined in different ways:

- **Customer benefit:** For example, helping people file taxes quickly and accurately.
- **Customer goal:** Making sure tax filing takes less than 30 minutes.
- **Customer problem:** People don't have the documents they need because they never received them.

Each version of the purpose guides the team's work differently.

A common mistake is focusing too much on building a feature (like importing data) instead of solving the actual customer problem (missing documents). When teams focus on the feature instead of the problem, they risk building something that doesn't truly help the customer. Staying anchored on the customer problem leads to better, more useful solutions.

To uncover the team's true purpose:

- Look at team documentation or shared spaces. Has the team clearly defined its purpose? Is it centered on the customer?
- Ask the team directly what its purpose is. If they talk about a customer problem or benefit, that's a good sign. If they mention a feature or business goal, ask "why?" and see if they can tie it back to the customer.

Also, ask how they know the problem matters:

- Is it a real problem customers face?
- Do they have stories or evidence showing people are affected?

If not, the team should talk to customers and observe their behavior. If customers don't see it as a big issue, they likely won't pay for a solution.

Bottom line: If the team can't clearly describe a problem that matters to customers, they might not be working on something worth solving.

Is everyone on the team working toward the same customer-focused goal?

If the goal is clearly documented or someone can clearly state it, that's great. But if different team members—even slightly—have different goals, it can create friction and slow things down. So it's important to check: Is everyone on the same page? Ask team members and their managers what their goals are. If you find any differences, that misalignment could affect how well the team performs.

Is everyone being evaluated and rewarded based on that same goal? Are their OKRs aligned with it?

One major source of frustration in teams comes when people are being measured on different things. This happens often when team members report to different managers or work in isolated functions. For instance, if one team is waiting on something from another team, and they're each focused on different deliverables, it's a sign the team isn't working as one.

Research shows that when we're measured on something, we tend to focus more on it and perform better. That's why diet plans often include tracking food and weight—it helps people connect their actions with their results. The same logic applies at work: Companies measure performance to help drive outcomes, often using formal systems like OKRs.

But if a team is tracking too many different things, focus can get scattered. Everyone pulling in different directions weakens the team's impact.

Think about it like baseball. As design executive, Joseph O'Sullivan, put it, the team's shared goal is to have more runs than the other team by the end of the game. While stats like batting average or number of hits matter, the main thing that counts—the one everyone cares about—is wins.

If the team's purpose is to get more wins, the metric should reflect that—either total wins or win rate. These are different. If it's just about total wins, playing more easy games might help. If it's about win rate, playing stronger teams might hurt.

A famous example of misaligned incentives is Wells Fargo. Employees were rewarded based on how many accounts they opened, which led to fraudulent activity. The metric didn't reflect a customer-focused goal—if it had, like measuring customer satisfaction or value, that kind of behavior wouldn't have made sense.

In product teams, different roles may focus on different metrics. Developers might care about system uptime, designers about task completion, and product managers about launch timing. These are all important, but if they're not connected to a shared goal, they can work against each other.

Take a tax product where the goal is to help customers upload their data. Developers want the system to stay up, designers want the process to be smooth and error-free, and product managers want to hit the deadline. Each of these matters—but they can also conflict. For example, fixing design issues might delay the launch. So it's key to make sure all these efforts align toward the shared goal.

Date is not usually a customer-focused goal.

Focusing solely on a launch date usually benefits the business more than the customer. It's often about boosting profits faster. But rushing a release can backfire—if the product isn't great, customers may not buy it, making the effort pointless. Eric Ries discusses this in *The Lean Startup*[3], where he shares a story about spending six months building a product that no one used—time he later felt would have been better spent on vacation.

So, making the launch date the top priority isn't the solution. Kaaren Hanson describes this dilemma as choosing "Great over Date." But in reality, you need a balance of both.

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[3] Ries, E. (2011). *The Lean Startup: How today's entrepreneurs use continuous innovation to create radically successful businesses.* New York: Crown Currency.

In my first job after earning my doctorate, I worked on early digital phones at Lucent. We focused heavily on delivering a top-tier user experience, and the audio quality set industry standards. However, the product wasn't a commercial hit because, by the time it launched, a competitor's more modern-looking design made ours seem outdated.

This shows that focusing only on quality isn't enough either. Part of the challenge is that the definition of "quality" keeps evolving, depending on what else is out there.

The ideal approach is for the product team to align around one clear, customer-centered goal and a measurable success metric. In a truly customer-focused company, this goal should connect directly to the company's overall mission and vision, so the team's success supports the company's success.

To understand whether teams are aligned on goals:

- Talk to individual team members and their managers. Everyone should give the same answer about what they're working toward and how success is measured. They should also be able to explain how their goals support companywide objectives.
- Review things like performance reviews, OKRs, and any published team goals. Check whether they match what people say.
- Attend meetings where key decisions are made. You should see decisions being guided by the agreed-upon goals and metrics—not by individual opinions or company-centered concerns like deadlines.

Does the team feel empowered to make decisions and take action?

A common issue teams face is feeling like they need permission before moving forward with solutions for customers. Many don't feel they have the authority to act on their own. Instead, they suggest ideas and wait for approval. But since they're the ones closest to the problems and solutions, handing off decisions to someone less involved can lead to frustration — especially when they're told "not now" or asked to shift focus.

A better approach is for leaders to set clear boundaries for decision-making and take on a coaching role rather than controlling every move. (See Section 3 for more.)

Teams that feel empowered tend to take initiative. While communication styles may affect how decisions are made, empowered teams usually move quickly once they have clarity.

Pay attention to how your team behaves.

If they take action without always asking first, it shows they feel trusted and empowered — often because leadership has provided clear guidelines that let them act confidently.

On the other hand, if a team frequently asks questions like “What should we do?” or “Is it okay if we do this?” — especially for things within their scope — it may be a sign they don’t feel ownership or responsibility for solving customer problems.

If that’s the case, it’s important to understand what’s holding them back:

- Is it a safety issue? Are they afraid of making mistakes or being penalized?
- Is it a belief issue? Do they think it’s not their role to make decisions?
- Is it an experience issue? Do they just lack the skills or confidence to decide?

How often are team members actually talking to customers?

Sometimes teams can sound very customer-focused, but when you ask them when they last spoke with a customer or for a real example, it turns out they’re relying on secondhand research or others’ insights.

The problem with this is that without regular, direct interaction, teams might make decisions that seem good for customers but don’t actually meet their real needs. One leader I worked with asked his team what they’d been hearing from customers, and more than half admitted they hadn’t spoken to a customer in years. That wasn’t acceptable for their customer-centric company, so they immediately made sure everyone started connecting with customers that same week.

Different stages of product development require different levels of customer interaction — but at every stage, there should be some level of regular engagement.

Take the example of Heinz redesigning its ketchup packets. The company spent a lot of time observing and talking to customers and even tested ideas in minivans, since many people use ketchup packets in drive-throughs. This helped them better understand end-user needs, even though the product didn't become as popular as expected because the price increase was not worth it for many restaurants.

Scott Cook, Intuit's founder, used to say, "Savor the surprises." He believed unexpected customer insights often led to major innovations. But it's easy to overlook things that don't fit our expectations. That's why it's important to have frequent customer contact — it gives teams more chances to be surprised and learn something new.

To gauge how customer-focused a team really is, look at what they're doing and ask a few questions:

- What did they learn from the last customer they spoke with?
- How are customers currently solving the problem?
- What kind of feedback have they gotten on their current solution?
- Also, check how often they observe and listen to customers and whether they have processes in place to learn from those interactions. Are they testing assumptions and adjusting based on what they hear?

How well is the team working together? How do they handle challenges when they come up?

Strong communication and teamwork are essential for creating customer-focused solutions that contribute to the company's success. This isn't just about serving customers—it's also about how the team operates internally.

A high-performing team builds strong relationships, respects each other and supports one another. Instead of blaming when things go wrong, they focus on finding solutions and getting the work done.

What to look for when assessing team collaboration:

- Join team meetings and observe how they interact.
- Review Slack conversations.
- Have conversations with team members and neighboring teams.

Things to notice:

- How do team members speak to each other during collaboration?
- Do they actively listen and build on each other's input, or do they interrupt or talk over one another?
- Is the conversation dominated by one person, or is the approach more balanced and collaborative?

Evaluate Product Teams

Since organizations often have many teams, it can help to assess each team separately. For each team, answer the following questions, rating your answer from 0 to 5.

Assessment Question	0 No	1	2	3	4	5 Yes	Comments
Does the team have a common, customer-focused purpose?							Ideally, this is about solving a clear and important customer problem, rather than building a specific feature.
Is the team clear and aligned on the target customers?							
Is the problem the team is working on important to the customer?							
Is the team aligned on a customer-centered goal?							
Are all members of the team being measured and rewarded on the same customer-centered goal?							

Is the team using the customer-centered goal to help them prioritize and make decisions?							
Does the team have agency to make decisions?							
Is the team spending time regularly with customers?							
Do they have stories, surprises and insights about what customers are trying to do, why, and what the customers need?							Does each team member have a story based on their own interaction with customers?
Is the entire team engaged, interacting respectfully and communicating clearly?							If not, are these issues getting in the way of delivering for the customer?

Total Score _____________

Average Score __________

Product Team Navigation Status

Based on your evaluation, here is how to determine your product team's navigation status:

- **Adrift** (1-1.9 average score) → The team is lost in internal priorities and lacks direction.Decisions are made without considering customers. Needs a complete transformation.
- **Off Course** (2-2.9 average score) → Some efforts exist, but The focus is on products, with customers as an afterthought.. Needs strategic realignment.
- **Navigating** (3-3.9 average score) → The team is making progress. Customer insights are used but not consistently prioritized. Needs targeted improvements.
- **On Course** (4-4.4 average score) → Customer needs guide many of the team's decisions, but might require fine-tuning in a few areas.
- **Full Speed Ahead** (4.5-5 average score) → Customer focus is embedded across the whole team and their processes. Focus on innovation and continuous learning.

Strengthening a customer-centered product team

To help your team grow, it's important to address the gaps you found in your assessment.

- If the team isn't clear on the customer problem, use the Customer Problem Statement Tool (Chapter 7).
- If there's frequent turnover or confusion about what to learn, try a FOG session (Chapter 7).
- Consider running an alignment conversation session if the team is misaligned on decisions, priorities, or actions (Chapter 7).

Chapter 5: Assessing the Products

Although the focus of this book is on assessing the organization, the products and services your organization creates for customers ultimately determine the company's success. Therefore, I'm including a brief assessment that you can incorporate into your evaluation.

Direct Customer Involvement in Product Development

Products that are co-created with customers can be highly successful, assuming those customers are the target users. The key to co-creation sessions is not to build exactly what the customer asks for but to understand why they respond to ideas the way they do and to consider their input in the evolution of the product design.

I won't go into detail on co-creation methods, but products designed with customer input tend to be more customer-centered than those designed without it.

Understanding the Customer's Experience

I highly recommend having the product team conduct its own assessment and document the findings (**see Chapter 6** for information about dashboards and metrics that might help). The appropriate measures will vary depending on the type of product.

For example:

- In a **digital app**, UX metrics such as task completion rates and a **SUS (System Usability Scale) evaluation** might be useful.

- For a **service**, the team may need to measure the customer experience over time as the service unfolds—such as tracking the flow of information at various stages of customer interaction.

It can be valuable for the team to conduct:

- A **heuristic evaluation** (**see the classic NNG usability heuristics**).
- **Usability tests**, measuring task completion, time on task, satisfaction, and identifying usability issues.
- **Other evaluations** of the product and its prototypes.

Ease of use can be measured in various ways. Determine what method defines **"easy to use"** for your product and measure accordingly. For ideas on how to measure usability, check out the taxonomy on **MeasuringU**[4].

Eliminating the Customer Problem

A successful customer-centered product eliminates the problem that prompted the customer to buy the product in the first place. There should be a clear benefit to adopting your solution.

As a team designs and builds the solution, they should use the **Customer Problem Statement** (**see Chapter 7**) as a **pressure test**. If the problem still exists after implementing the solution, the product is not adequately addressing the customer's needs, and the team's work is not yet done.

[4] https://measuringu.com/taxonomy-of-70-ux-metrics/

Evaluate Products

Since organizations may have multiple products, it is useful to assess each product individually and then analyze the portfolio as a whole for a broader evaluation.

Assessment Question	0 No	1	2	3	4	5 Yes	Comments
Are customers participating in the creation of the solution?							
Is the product solving an important customer problem?							
Is there a clear benefit for the customer to adopt this product?							
Is the product easy for customers to use?							What ease-of-use metric corresponds to your team's definition of "easy to use" for this product?

Total Score ____________

Average Score _________

Product Navigation Status

Based on your evaluation, here is how to determine your product navigation status:

- **Adrift** (1-1.9 average score) → Products are created with minimal information or input from customers. High Risk to the organization. Needs customer empathy (consider a Customer Safari -- See chapter 7).
- **Off Course** (2-2.9 average score) → Some customer-focus efforts existed in the product design or development process, but the products are not consistent at solving customer problems. Needs alignment on what is known and what needs to be explored (consider a FOG session -- see Chapter 7).
- **Navigating** (3-3.9 average score) → The product is created with the customer in mind, but may have experience challenges. Needs targeted improvements.
- **On Course** (4-4.4 average score) → The team is strongly focused on the needs of the customer, but need to remain relentless on prioritizing the customer experience.
- **Full Speed Ahead** (4.5-5 average score) → The product is solving important customer problems and has clear benefits for customers. Should continue to focus on innovation and continuous learning.

Strengthening Customer-Centered Products

If your product teams have an **experience design function**, they likely have insights into what would improve the product for customers. The trade-offs between internal requirements and customer needs are real, but the team must clearly understand **where priorities lie**.

If a product scores poorly on the assessment above, dig deeper into the team and leadership to identify barriers to improving the customer experience.

Chapter 6: Measuring Progress

High-Level Targeting Map Overview

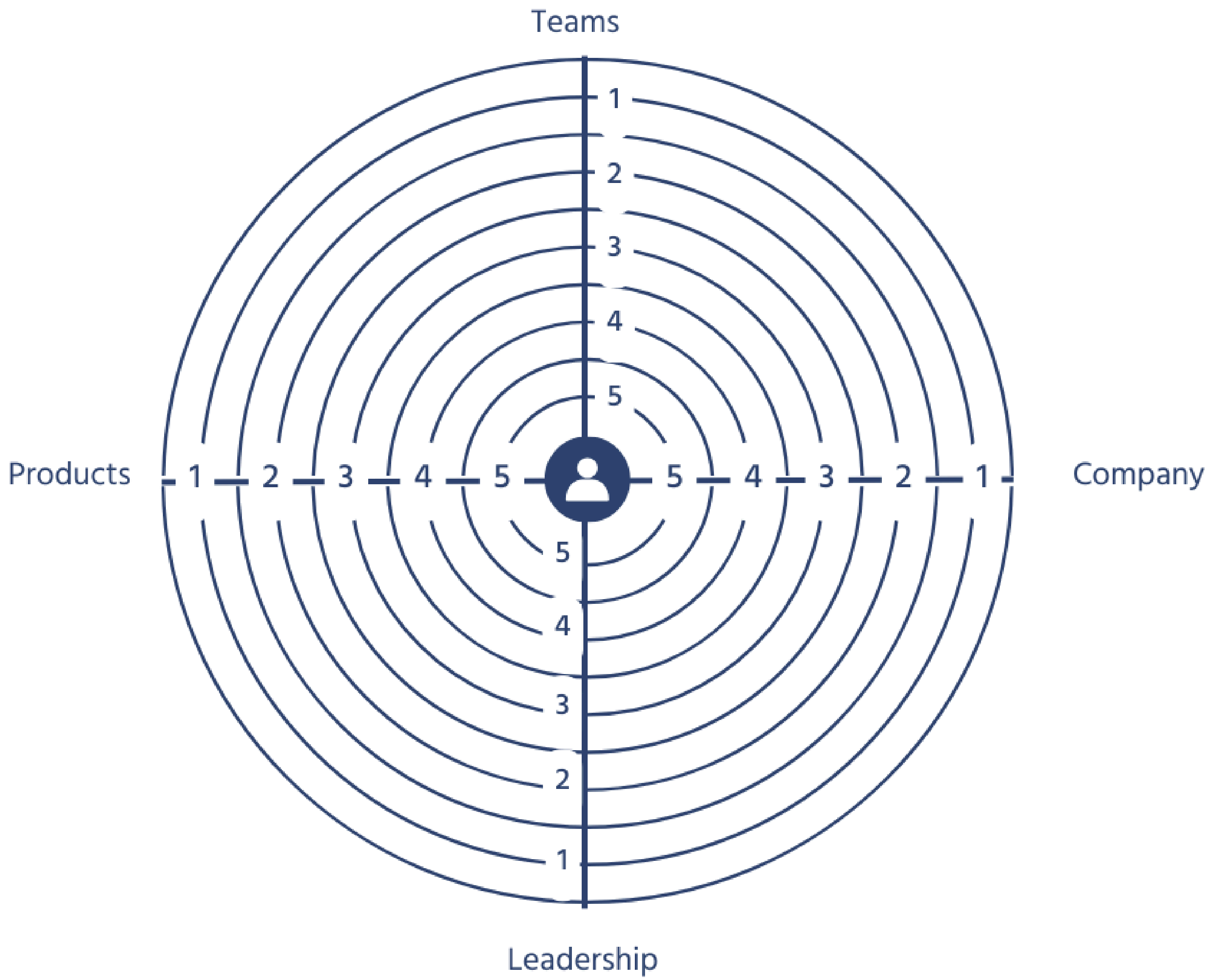
Take the average scores from your four assessments — Company, Leadership, Teams (average), and Products (average) — and plot them on the targeting map. This will give you a big-picture view of how your organization is doing overall. If the scores are uneven, that could point to areas that need more attention. The closer the scores are to the center of the target, the more customer-focused your organization is.

Because many of the assessment items are subjective, it's helpful to have multiple leaders complete them. Comparing results can reveal whether everyone is on the same page or if there are differing viewpoints that need further discussion.

Based on your overall averages, connect the dots and see what shape and size the map is. If it is large, your organization is probably at a lower level. If the shape is small, towards the center of the map, your organization is probably at a higher level.

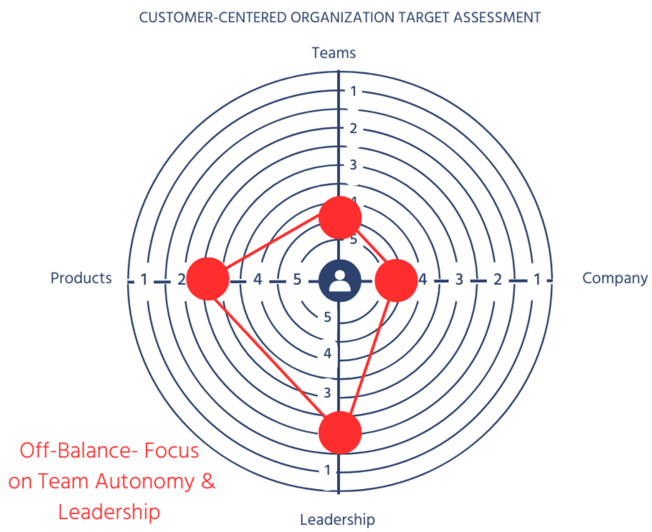
- **Level 1: Adrift** – Decisions are made without considering customers.
- **Level 2: Off-Course** – The focus is on products, with customers as an afterthought.
- **Level 3: Navigating** – Customer insights are used but not consistently prioritized.
- **Level 4: On-Course** – Customer needs guide many business decisions.
- **Level 5: Full Speed Ahead** – Customer focus is embedded throughout the organization.

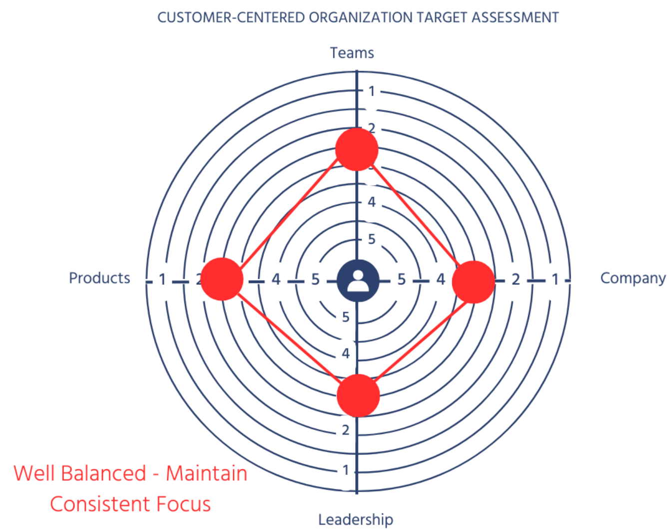
CUSTOMER-CENTERED ORGANIZATION TARGET ASSESSMENT

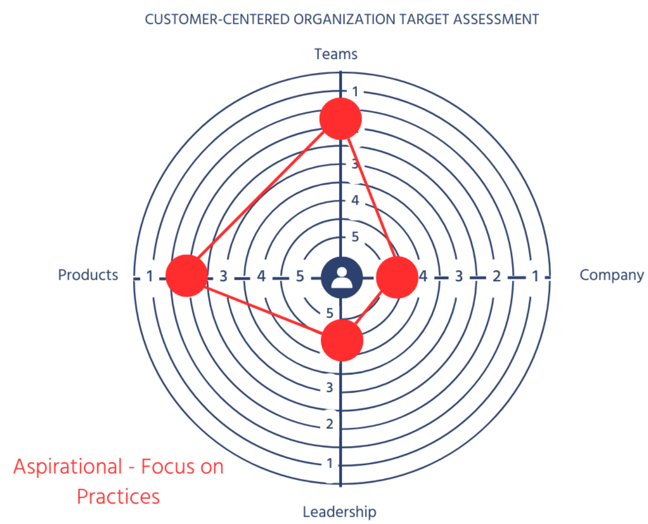


Example Targets

If the shape is not symmetrical, it might suggest where to focus. Here are some examples:







Dashboards and Metrics

Tracking and Measuring: Gaining Clarity and Focus

Tracking and measuring help us gain clarity and focus, but they also increase the importance of what is being measured. In customer-centered organizations, it helps to create a dashboard that tracks actionable and unambiguous metrics.

Outcome is the key metric—customers using the product to achieve the benefit. Although teams discuss measuring effort (how many hours they put into building something), it is probably not the most critical factor. Effort is important in achieving the outcome, but consistency is key.

For example, consistency is critical to my running success, so I track the number of days per week that I run, in addition to the races I complete and my overall health improvements. If I didn't track my runs, it would be easy to let them slip, making races harder to complete and likely harming my health. That is why I think effort is a metric I **could** track—though it's not the main thing that counts.

Although you might be tracking lag measures, such as customer acquisition, CSAT scores, and revenue, many factors contribute to those metrics, and there is often a long **lag** between when behaviors occur and when the ultimate outcome is achieved. So, we want to measure behaviors.

Stephanie Sansoucie, an executive leadership coach, says:

> "The problem with lag measures? They show up too late to change behavior. If you're not tracking exposure hours, you're hoping for better customer outcomes instead of ensuring them. Customer exposure is a lead measure. The more time teams spend engaging directly with customers, the more insight they gain and the better their decisions get."

The assessment items from the previous sections of this book may provide some data, but much like the visibility of my run tracking, you will want to create a way to make the data you are collecting more visible. Define key metrics for specific teams to focus on. Remember that these metrics must align with the goals of the team and the company as a whole. It must be clear how each metric directly impacts progress so that you can identify when progress is stalling and take steps to change course.

I contacted some experts in my network to find examples of useful customer-centered metrics. Here are a few examples that might work for you:

Customer-Centered Metrics

Number of customers interacted with per week/month

Jon Innes, consultant and former design executive, said:

> “Customer interaction metrics, like the number of end-users interacted with over a period, are remarkably powerful when teams—and especially leaders—track them. With SaaS clients, I suggest they try to talk to customers during trial periods, as well as checking in with existing customers periodically. It's key to align these efforts with an established business metric/outcome like increased conversion rates or retention rates.”

Average number of customer conversations per quarter per employee

Erin Casali, senior director of product and design, says she likes:

> “# of customer chats per quarter per person.”

She goes on to point out:

> “One could skip the 'per person,' but it's one of those tricks that, when added to the measure, suddenly makes people think more about individuals and less about totals. (I don't care if the research team speaks 40 times—if the engineering number is zero, that isn’t sufficient.)”

Number of days since we engaged with a customer

For product teams—as opposed to customer support, sales, and services teams—it is easy to let the days slip away. Ben Grossman-Kahn, consultant and co-founder of the Design Thinking and Innovation Collective, says:

> "I often encourage teams to keep an OSHA-style tracker—how many days has it been since we engaged with a customer? We joke that OSHA could stand for 'Oh sh*t, we're harboring assumptions.'"

Exposure Hours

The number of hours each team member is exposed directly to real users interacting with the team's designs (or a competitor's designs).

Jared Spool, CEO and consultant, wrote an article[5] a few years ago where he said:

> "There is a direct correlation between this exposure and the improvements we see in the designs that the team produces."

He says every team member should get exposure to customers at least every six weeks. This applies whether the team is brand-new or working on a long-established product. As time goes by, more features and complexity are typically built into products, so it becomes critically important to observe how people use them and engage with customers when determining how to improve them.

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[5]Spool, J (2011) Fast Path to a Great UX – Increased Exposure Hours. https://articles.centercentre.com/user_exposure_hours/

Chapter 7: Resources to Help Teams Get and Stay Customer-Centered

Customer Problem Statement Tool

Using a Customer Problem Statement to Align Your Team

One way to verify whether your team is aligned on a customer problem is to have them fill out a customer problem statement template for the problem they are solving. We developed the format I use during my time leading innovation at Intuit. It is structured from the customer's perspective and taps into several important elements. I'll break them down below and suggest how you might use this tool with your teams.

Customer Problem Statement Template

I am **[customer persona or behavioral characteristics of the customer]**.
I am trying to **[task or job they are trying to do]** to achieve **[benefit they are trying to achieve]**,
But **[problem or barrier that is stopping them or slowing them down]**,
Because **[root cause of that problem]**,
Which makes me feel **[emotion]**.

Example Problem Statements

Example 1:
I am a middle-aged U.S. taxpayer with two dependent children and a rental property.
I am trying to file my 2025 tax return on time to avoid late penalties,
But I can't get all of my tax forms,
Because my property manager hasn't sent me the 1099 and he's out of town,
Which makes me feel impatient and irritated.

Example 2:
I am a newly divorced woman with two children and a dog.
I am trying to find a house to move into to achieve some stability for my family,
But I can't find a rental that I can afford,
Because the housing shortage in my town has increased rental rates,
Which makes me feel desperate and ashamed.

Key Takeaways

You'll notice a few things about this:

- **It's from the customer's perspective, not the company's.** Using real customer data to determine precisely who the target customer is allows the team to align around the same customer.

- **It doesn't suggest a solution.** This allows for multiple possible approaches to solving the problem. It focuses solely on the customer's problem.

- **The "I am trying to" statement highlights the customer's current actions and motivations.** This helps the team understand the goal or vision they are aiming for.

- **The “But” and “Because” lines define the core of the problem.** If the team successfully solves this issue, the problem statement will no longer be true.

- **The “Which makes me feel” line humanizes the problem.** It builds employee empathy for the customer, tugging at the heart and fueling passion for solving the issue.

How to Use This Tool as a Leader

- **As a kickoff tool:** When a product team is just starting, filling out this template as a team is a great way to align on the team’s purpose and surface any disconnects or differing perspectives.

- **As an assessment of alignment:** Have each team member fill out the template. The answers should be nearly identical. If they aren’t, that’s a red flag 🚩 that the team needs to align on the problem they are solving before proceeding.

- **As documentation:** Keep the completed template front and center in the team’s workspace. Regularly refer to it to ensure decisions align with solving the problem. It can also serve as a reference for new team members to keep the project on track.

FOG: A Method for Clarifying What Teams Know and Need to Learn

One of the most powerful methods I've found for helping teams get clear on what they know and what they need to find out from customers is a method I call **FOG**. FOG is an acronym for **Facts, Observations,** and **Guesses**.

Here's the gist of the method:

1. **Get everyone to write down what they know** (related to the product, the customer, etc.).

2. **Affinitize (cluster) if needed** to process what you have. Remove duplicates—just because multiple people know something doesn't make it more or less accurate.

3. **For each item, identify and agree as a team:**

    - **Is it a FACT?** You have hard data to support this knowledge. This might be published research, experimental research data, or other large-scale research findings. The bar for this is high—it must be backed by substantial evidence.

    - **Is it an OBSERVATION?** Something you have seen yourself. It's not enough if someone says they've seen it. Observations are direct experiences, and while they might be misinterpretations of the situation, they are still things you have personally witnessed.

    - **Is it a GUESS?** Something you assume is true but don't really know. Sometimes you can make highly educated guesses—perhaps you heard something from someone else or experienced something yourself that leads you to believe it's true. But you don't have data to support it.

Using FOG to Guide Customer Research

Identify the things that must be true for your product to succeed (or to make a particular decision).

- **If an item is a FACT**, you can feel confident taking action based on it.

- **If an item is a GUESS**, the team should validate it through observation (e.g., site visits or live tracking data).

- **If an item is an OBSERVATION**, you can be somewhat confident acting on it. However, if it could make or break your product's success, you need to conduct an experiment or large-scale research to determine its scope and scale.

Addressing Misalignment and Decision-Making

Teams can sometimes get stuck due to misalignment or conflicting perspectives. If the team can identify and address these issues on their own, that's ideal. However, if they are losing momentum, you can lead them through an **Alignment Session** to get them on the same page and making decisions.

Alignment Sessions

Facilitating an Alignment Session Without Dominating the Discussion

As a leader, you might notice that the team is struggling to make decisions or set priorities. As we discussed earlier, the team needs to be aligned and working together to be most effective. You can step in at these times and facilitate an alignment session to achieve alignment and agreements.

Here's a simple way to do that without dominating or influencing the discussion too much—when you want the team to own it.

1. **Gather everyone together.** Let them know that the purpose of the meeting is to align on [whatever it is they need to decide]. Explain that since they are a diverse team with different perspectives, it's important for everyone to hear one another's point of view before making a decision. Tell them that you will go around the room and call on each person, and you want to hear what they think and why. You will ask clarifying questions and capture each person's perspective (write it on a whiteboard or another visible place).

2. **Ask each person for their perspective and capture it.** Don't judge—even if they are wrong. Just listen actively and record their input.

3. **After hearing from everyone, summarize the alignment level.** Point out whether the team is already aligned (or mostly aligned) or whether differing points of view exist. This may seem obvious, but acknowledging it is still important.

4. **If the team is aligned, propose moving forward.** Suggest that they make a decision based on the aligned perspective. Ask each person if they agree. If everyone agrees, document it and distribute it to the team.

5. **If the team is not aligned, facilitate discussion.** Have the team discuss each perspective, then solicit a proposal from them about how they might proceed. If they reach an impasse, ask:

   - **“How might we quickly test out both of these options?”** This can help generate ways to collect information to inform the decision.

   - **“How could we get customer input to help us decide?”** This shifts the focus toward customer insights.

6. The goal is to model curiosity and drive while holding the team accountable for making progress.

7. **As a last resort, make the decision yourself—but explain your reasoning.** If all else fails, step in and make the decision. However, be sure to explain your justification, how you arrived at the conclusion, and how you’d like the team to approach similar decisions in the future.

Empathy Safaris

What if you discover that your team is not customer centered and does not regularly interact with customers? Sometimes it's enough just to tell them to do it or to hire a researcher to help, but one of my favorite methods is to create a customer safari to get the team immersed in the customer. As a leader, you can instigate an activity to do in a few hours that can shift the trajectory and build interest in understanding customers and improving their experiences.

Although there are many ways that you can craft an empathy safari, these are five types of safaris that you may consider sending your team on.

Direct Encounters With Customers

This type of safari sends your team out to be with customers, in their own environment.
Although this could be a set of simultaneous site visits, it could also be meeting customers more casually in the environment that they are already hanging out in. For example, you'd find mothers of young children at parks, college students at a college campus or nearby coffee shopand business people on trains. This type of safari requires that the team directly engage the customer in that environment, not to ask them about the product/service they have, but to talk with them about their challenges and concerns. Meeting and connecting with the people who are your customer helps to put a face on your customer and helps them understand the larger context in which your product comes into play.

When to use it: When your team hasn't met with customers in a long time (or ever). When you suspect that the team isn't thinking about the larger context that the customers are
experiencing.

Eyes Wide Open in the Wild

This type of safari is more exploratory, less scripted than direct encounters, and may not directly engage with customers or other people at all. The purpose of this type of safari is to observe and wonder, to engage curiosity and to see the larger scale of things. For example, you can go out to find examples of "Fresh" to identify the characteristics of fresh things and things that convey "fresh" --you might send people to a grocery store, an art museum, or a farm to learn about fresh. Seeing the world with fresh eyes can help to inspire new ideas, help them make connections to physical things in the world, and can help raise awareness of the availability of inspiration in their everyday lives. This also works really well if your mission includes photography (Pictures are worth a thousand words, make great reminders, etc).

When to use it: When your team needs a shot of inspiration before a design sprint, a brainstorming session, or at a product kick-off. When the team needs shared bonding experiences that help them connect to themselves and the world that they are working for.

Walk in their Shoes (try it out)

This type of safari has the team either go through an end-to-end experience (or that of a competitor), or actually try doing the job that the customer is trying to do. One way to make this out in the world and interesting, if your product or service is virtual, is to have the team try to do the job without the use of technology. For example, if your solution is a payments app, you might have the team try to go in person and pay a bill in cash (try something like a utility bill, where there's an office they could go into). Ideally, the experience will require actually walking in the world and doing something like the customer would be doing. This works really well as a "scavenger hunt" or contest.

When to use it: When the team hasn't experienced or thought deeply about the customer's perspective when trying to solve the problem that your product solves. When the team is large and you want to ensure that everyone has some first-hand experience. When the team needs a boost of energy, to leave the building. When the team is competitive (especially if you do this as a contest with a prize).

Analogous Experiences

This type of safari requires that the team experiences something that is analogous to the experience their customers have. This is particularly good for giving them the ability to look at what they are creating with fresh eyes. For example, if your team creates an application for arranging babysitting, you might send them off to find a safe solution for taking care of a pet while on vacation (particularly a very needy puppy!). Have them generate ideas - including pet-sitters, kennels, etc. and check out each of them in turn.

When to use it: When your team is extremely familiar with customers and the current customer experience. When the team members are customers themselves. Just before ideation/brainstorming.

Extreme Users

This type of safari is focused on breaking people away from the confirmation bias that develops when teams spend some time with target customers and are beginning to think too incrementally about how to improve things. Typically, you want to focus on your target customers, but when you are looking for inspiration, it helps to talk to the edge-cases, because they are more likely to be able to articulate needs and have work-arounds that suggest new directions. Let's take the classic example of Intuit's QuickBooks product. When their product for individual money management, Quicken, was being used by small businesses, Intuit initially dismissed this as an aberration. However, after a few years of data that consistently showed these edge case users, the team decided to go out and understand them. They uncovered a huge unmet need - small business people who didn't understand accounting and couldn't afford to hire an accountant were using Quicken to help them track their business finances (because it was easy and straightforward). The team recognized an opportunity, built a new product specifically for small businesses - and QuickBooks was born. The key moment was the investigation of the edge cases. You can arrange to have your team meet up with edge cases to gain understanding and inspiration.

When to use it: When the team says "I already know what customers want" or is focused on building incremental features, rather than solving problems. When you want to challenge people to go beyond the obvious.

After a safari, ask the team what they can do to build more customer interactions in their work.