

Course Syllabus

Customer Insights for Innovation: *A focus on well-being and opportunities to enhance life*

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Course Description:

Many business opportunities and decisions depend on an understanding of customers' values, needs, aspirations and behaviors. Even more important for a specific company is gaining *unique* insights into their customers so that they can develop products, services and brands that are differentiated from competition. The research conducted to identify these unique insights can be challenging since, by definition, new insights are initially unknown and cannot, therefore, simply be validated with traditional marketing research tools, such as surveys. Fortunately, many methods have been developed over the last few decades to enable the discovery of new customer insights. These qualitative research methods include contextual inquiry, in-depth interviews, netnography, focus groups and many others. This course will be an immersive and experiential introduction to customer insights research - including data collection and synthesis - focusing on a sequenced subset of these qualitative research methods. In addition, these methods will be applied within the context of defining concepts for new products and services that address the insights identified.

Beyond our focus on customer insights and innovation, we will be specifically focused on the theme of 'well-being'. This is a critical topic, vitally important to each of us individually, within our communities, and for society overall. This also is a unifying theme for all COLL 300 courses this fall, including this course.

(from W&M's Center for the Liberal Arts) "The qualitative (and subjective) state of "well-being" gains increasing importance as we move beyond simple survival. Individuals

with higher perceived levels of well-being report feeling healthy, socially engaged, and satisfied with their lives; societies structured to promote well-being are likelier to have a flourishing citizenry. What personal, social, community, physical, and environmental contexts best nurture not only the health of human beings, but of all creatures?

This is also vitally important to anyone involved directly or indirectly in helping to shape our evolving economy. One way to think about this is to ask the question, “How might we use the methods and resources of business and industry to enhance life?” This represents a major – if not the major – challenge, opportunity, and responsibility of business in the 21st century. Given the interdependence of economic, social, cultural, and environmental forces and participants in this context, this will also be a complex and really interesting theme for this course.

Course Objectives:

1. To introduce you to Marketing Research as a process, integral to managerial decision-making.
2. To give you hands-on experience with specific qualitative research and analysis tools/methods, applied to the challenge of identifying Customer Insights.
3. To improve your ability to observe and listen – to empathize with others and to identify and solve problems.
4. To continue to develop your communication skills.
5. To explore the concept of well-being, building on your own perspective to understand what this means to other people and to learn about what can be done to enhance others’ lives

Course Philosophy/Approach:

This will be a very hands-on, interactive course. Rather than teach you all the minutiae of qualitative marketing research, I will focus on ensuring that you learn the fundamentals – and learn them well. To accomplish this, you will be working in groups on a project. I will be leading lectures/discussions “just-in-time” to enable your project work throughout the course. This approach (vs. an all-lecture approach) will be engaging, fun and will be a great way to learn the fundamentals. It will, however, require flexibility, some comfort with ambiguity and an ability to stay organized and balance your workload (i.e., “real life” skills!). That being said, you will be getting some great experience in this course and I genuinely think you will enjoy the experience.

Assignments and grading:

Several complementary assignments – both individual and group – will provide an opportunity for learning as well as a basis for evaluation of your progress (no exams!). Your grade for group projects will depend in part on a group peer evaluation (your grade could be adjusted up or down from your group's baseline grade depending on a consistent pattern of feedback from your group members).

Your course grade will be determined as follows:

Class Participation		15%
Blog		25%
Group Project		60%
Documented project	45%	
Final presentation	15%	
Total		100%

Class Participation:

My goal is to inspire and enable good discussions and debates in class. For this to work, we will need to have everyone participate. We all have different comfort levels with class participation, and different styles. Let's acknowledge – and even celebrate – these differences; but let's also push ourselves to engage in useful (and fun) ways. Comfort and ability with dialogue and debate is needed to solve problems “out there” and will really help with our experience in the course as well.

Blog:

Maintain an online blog of reflections throughout the course; the course schedule identifies required entry dates & topics, but you are encouraged to write whenever you feel inspired as well. The focus of your writing will be on processing and *reflecting* on what you have read, what was discussed in class, what was done in class, and what you experienced in the ‘field’; in other words, it is an opportunity to discuss thoughts, feelings and ideas that emerge throughout the course. *It is not intended to be a diary in which you simply document what you have done or heard.* Instead, you will briefly mention the topic/activity and then will use the process of journaling to explore and share your own insights (you will also maintain a journal of notes throughout the semester as an informal but important tool to aid your ongoing learning and project work).

Group Project:

Each of you will be assigned by me to a group. These groupings will be formed primarily based on the guiding principle that diverse teams are more productive, and you will get to know some new and interesting people along the way.

I strongly suggest that *each of you* make a proactive effort to communicate within your group about the project work – don't wait for someone else to start these discussions! Discuss what needs to be done, how it needs to be done (individually vs. as a group), expectations etc. Group work can be a great experience, but it can also be challenging. Address issues with group dynamics proactively, and ask for my help to coach you if needed.

Each individual's grade will depend upon his/her own performance in the group, i.e., it will reflect each person's contribution to the group (as reported by the group collectively). As such, you must complete one final project evaluation of your group members and submit it no later than the last day of class. I reserve the right to drop a person's Project grade by up to 2 full letter grades if he/she did not contribute their fair share to the project. Conversely, I will increase grades for team members that contribute more than their "fair share", i.e., it is a "zero-sum game".

(see the Course Schedule for topics and assignments by date; pay attention to updates in class as the course progresses)

Session #	Day/Date	Assignment (due before class)	Topic(s)
1	W-Aug 24		<ul style="list-style-type: none"> • A: Course/syllabus overview • IDEO's Deep Dive • Blogs
2	M-Aug 29	<ul style="list-style-type: none"> • Read B: "Design Thinking - HBR" • Read B: "Solving Problems for the Real World" 	<ul style="list-style-type: none"> • B: Design Thinking Part 1: <ul style="list-style-type: none"> ◦ Design Thinking Bootcamp
3	W-Aug 31		<ul style="list-style-type: none"> • B: Design Thinking Part 2: <ul style="list-style-type: none"> ◦ Bootcamp "Show & Tell" ◦ Design Thinking debrief & overview
4	M-Sep 5	<ul style="list-style-type: none"> • Blog reflection on Design Thinking Bootcamp • Read C: "Converting need into demand – Tim Brown" • Read C: "Innovator's DNA – HBR" 	<ul style="list-style-type: none"> • C: Marketing Research and Customer Insights <ul style="list-style-type: none"> ◦ Introduction to Marketing Research ◦ Overview of Customer Insights ◦ Overview of Marketing Research Process
5	W-Sep 7	<ul style="list-style-type: none"> • Complete Well-Being surveys (TBD) • Review campus resources 	<ul style="list-style-type: none"> • Discuss Well-Being • E: Secondary Research • Journaling
6	M-Sep 12	<ul style="list-style-type: none"> • Background reading on Well-Being 	<ul style="list-style-type: none"> • Discuss Well-Being (continued)
7	W-Sep 14	<ul style="list-style-type: none"> • Conduct your own secondary research on Well-Being 	<ul style="list-style-type: none"> • Discuss Well-Being (continued) • D: The project <ul style="list-style-type: none"> ◦ Team formation ◦ Project introduction: Innovation for Well-Being ◦ Define group projects – pick a target and domain that is <i>new</i> to you
8	M-Sep 19	<ul style="list-style-type: none"> • Blog reflection on Well-Being • Read F: <u>Essentials of Marketing Research</u>, ch. 4, pp. 76-82 and 91-96 	<ul style="list-style-type: none"> • F: Qualitative Research Techniques <ul style="list-style-type: none"> ◦ Overview of Qualitative Research Methods • J: Data Synthesis – <i>a look ahead at synthesis outputs</i> <ul style="list-style-type: none"> ◦ Personas

			<ul style="list-style-type: none"> ○ Empathy Maps ○ Journey Maps
9	W-Sep 21	<ul style="list-style-type: none"> ● Read G: “Qualitative Research Methods – A Data Collector’s Field Guide,” pp. 13-27 	<ul style="list-style-type: none"> ● G: Ethnography <ul style="list-style-type: none"> ○ Introduction to Ethnography ○ IDEO – Whose Life exercise (?) ○ Observation Guides ○ Fieldnotes
10	M-Sep 26	<ul style="list-style-type: none"> ● Develop Observation Guide ● Fieldwork: Observation 	<ul style="list-style-type: none"> ● J: Data Synthesis <ul style="list-style-type: none"> ○ Synthesis of observed behaviors; brainstorming questions
11	W-Sep 28	<ul style="list-style-type: none"> ● Blog reflection on Observation ● Read I: “Qualitative Research Methods – A Data Collector’s Field Guide,” pp. 38-45 (start at “What are important skills for interviewing”) 	<ul style="list-style-type: none"> ● I: Interviewing <ul style="list-style-type: none"> ○ Interviewing and Interview Guides ○ Develop Interview Guide
12	M-Oct 3	<ul style="list-style-type: none"> ● Conduct interviews (in pairs; 2 per pair, switching roles) ● Transcribe interviews and bring to class ● Read H: “<u>Essentials of Marketing Research</u>, ch. 9 	<ul style="list-style-type: none"> ● H: Qualitative Data Analysis <ul style="list-style-type: none"> ○ Introduction to Qualitative Research Analysis/Synthesis ○ In-class data analysis
13	W-Oct 5	<ul style="list-style-type: none"> ● Blog reflection on interviewing 	<ul style="list-style-type: none"> ● H: Qualitative Data Analysis <ul style="list-style-type: none"> ○ In-class data analysis (continued)
Oct 10-11		Fall Break	
14	W-Oct 12	<ul style="list-style-type: none"> ● Watch & read background on visitor 	<ul style="list-style-type: none"> ● Steve Wise visit, “Unlocking the Cage: Animal Well-being and the Law”
15	M-Oct 17	<ul style="list-style-type: none"> ● Read J: “Designing for Growth – ch. 4, Journey Maps” ● Skim J: “Personas” 	<ul style="list-style-type: none"> ● J: Data Synthesis – learn about... <ul style="list-style-type: none"> ○ Personas ○ Empathy Maps ○ Journey Maps
16	W-Oct 19	<ul style="list-style-type: none"> ● Continue Data Synthesis 	<ul style="list-style-type: none"> ● J: Data Synthesis – create... <ul style="list-style-type: none"> ○ Personas ○ Empathy Maps

			<ul style="list-style-type: none"> ○ Journey Maps
17	M-Oct 24	<ul style="list-style-type: none"> ● Blog reflection on Data Synthesis 	<ul style="list-style-type: none"> ● K: Problem (opportunity) definition
18	W-Oct 26	<ul style="list-style-type: none"> ● Watch & read background on visitor 	<ul style="list-style-type: none"> ● Tamer Farag visit, “The Health and Well-Being of Children around the Globe”
19	M-Oct 31	<ul style="list-style-type: none"> ● Read L: “Learning to think outside the box” ● Read L: “What kind of thinker are you?” 	<ul style="list-style-type: none"> ● L: Create - Ideation
20	W-Nov 2	<ul style="list-style-type: none"> ● Blog reflection on Ideation 	<ul style="list-style-type: none"> ● L: Create - Prototyping
21	M-Nov 7	<ul style="list-style-type: none"> ● Complete low-resolution prototype ● Blog reflection on Prototyping 	<ul style="list-style-type: none"> ● Evaluate <ul style="list-style-type: none"> ○ Using Feedback Grids to gain more insight ○ Intergroup sharing and feedback
22	W-Nov 9	<ul style="list-style-type: none"> ● Supplement insight with additional Secondary Research 	<ul style="list-style-type: none"> ● Evaluate <ul style="list-style-type: none"> ○ Intergroup sharing and feedback (continued) ○ Refine prototype ○ Develop plan & interview guide for soliciting external feedback
23	M-Nov 14	<ul style="list-style-type: none"> ● Solicit external feedback on prototype concept 	<ul style="list-style-type: none"> ● J: Data Synthesis – refine... <ul style="list-style-type: none"> ○ Personas ○ Empathy Maps ○ Journey Maps
24	W-Nov 16	<ul style="list-style-type: none"> ● Watch & read background on visitor 	<ul style="list-style-type: none"> ● Wilson Wewa visit, “We Are Created from This Land: Indigenous Views on Place, Spirituality, and Wellness in the 21st Century”
25	M-Nov 21	<ul style="list-style-type: none"> ● Finalize presentations and final project portfolio 	<ul style="list-style-type: none"> ● Final Presentations
Nov 23-25		Thanksgiving Break	
26	M-Nov 28		<ul style="list-style-type: none"> ● COLL 300 Symposium
27	W-Nov 30		<ul style="list-style-type: none"> ● Symposium debrief and course wrap-up