

Incorporating Deep Customer Insights in the Innovation Process

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Overview

The new product development or innovation process (hereafter IP) is currently a “hot topic” in the marketing and management press (Hamm 2006). Numerous books and articles have been written about the IP and how it works (or doesn’t work) in companies (e.g., Burgelman and Salyes, 1986; Christensen & Raynor, 2003). Many consultancies have earned their bread and butter helping clients invent, select, develop and market new products and services (Kelley and Littman, 2005). Much writing about innovation focuses on how to develop better management processes for choosing which new product ideas to develop further (e.g., Christensen, 2000, called for a focus on disruptive innovations), or how to shepherd new product ideas through the corporate innovation system. Other authors have been concerned with making the IP more customer-centric (e.g., Cooper & Edgett, 2007). Despite this intense attention to innovation, however, the failure rates for new products remain unacceptably high, with estimates ranging from 50% to 90% (e.g., Ulwick, 2005).

In this paper, we suggest that a successful IP requires a much deeper understanding of customers than is usual. Unfortunately, the typical qualitative methods (focus groups, basic one-on-one interviews, or simple ethnographies) used to gain customer understanding reveal only “surface-level” insights about customers’ unmet needs, desired solutions, or sought-after benefits.

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In fact, these traditional methods are incapable of producing the deep, fundamental understanding of customers that managers need to guide their innovation decisions (Ulwick, 2005, Christensen 2000). In this paper we seek to address this problem by promoting an approach that does uncover deep insights that can guide management decisions about new products. We begin by defining “deep” insights, and then we describe ZMET, a uniquely effective method of discovering them. Following, we present six case examples of how a ZMET approach was used to inform decisions at different stages of the IP.

What is a “deep” customer insight?

Zaltman and Zaltman (2008) point out that managers need deep insights FROM customers in order to have deep insights ABOUT customers. Deep insights are based on the fundamental or core meanings customers have about a topic such as an activity (snacking), a problem (cleaning floors), or a product (computer software) and the role it plays in their lives.² These deep meanings operate in largely unconscious ways to structure, guide, and motivate customers’ more conscious interpretations and choices. To gain access to these core meanings, we need innovative research methodologies that can help customers dig down to their unconscious thoughts and emotions and bring them to the surface. The Zaltman Metaphor Elicitation Technique (ZMET) is such a method.

What is ZMET?

ZMET is a patented research methodology developed in the early 1990s by Professor Gerald Zaltman of the Harvard Business School and used exclusively by Olson Zaltman

² Throughout this paper we use the term “customer” to refer to both business customers (such as retailers) and individual customers who actually use and consume the product or service. We use the term “product” to refer to both physical products and intangible services.

Associates (OZA) for the past ten years. ZMET is based on ideas derived from cognitive and clinical psychology, cognitive neuroscience, anthropology, and sociology. ZMET probes beneath the surface to reveal "what people don't know they know" – the unconscious thoughts and feelings that influence a person's decision-making and associated actions that are missed by traditional research methods. In our work at OZA we have used ZMET to dig deep into peoples' thoughts and feelings about a wide variety of topics from quite specific (What do customers think about attribute X?) to very abstract (What does "having fun" mean to people?).

Four Important Principles of Mind

ZMET is grounded in several important facts about brain functioning and how the human mind operates. We believe any marketing research approach designed to truly understand customers at a deep level should incorporate these principles. Following, we review four fundamental aspects of mind that underlie the ZMET approach (see Zaltman 2003 for additional detail about these ideas).

1. The unconscious mind "rules." It is now commonly accepted that most mental operations (mind work) occur unconsciously. Like an iceberg with most of its mass under water, our minds operate mostly below the level of consciousness. Scientists estimate that approximately 95% of mind functioning is not (easily) available to our conscious awareness, yet peoples' unconscious thoughts and feelings have profound influences on their interpretations (meanings and beliefs), decisions and behaviors. As mentioned above, typical research approaches focus on conscious beliefs and attitudes, whereas ZMET, by exploring unconscious meanings, helps customers reveal "what they don't know they know."

2. Images are central “components” of mind. The human mind operates on images, not words. For instance, asking someone about home is likely to activate not only visual images of their own home or their childhood home, but also images associated with other sensory modalities (such as the smell of bread cooking in the oven or the sound of the garage door opening when a parent came home from work every evening) along with associated emotional meanings for each of these sensory images. Physiologically, an image is a pattern of neural activation in the brain, and thinking involves mental “manipulations” of those meaning patterns. Direct questioning methods rely heavily on words and cannot tap into the deeper, unconscious meanings that underlie the words. Techniques that leverage the power of images will be more successful in revealing deep, unconscious insights about customers.

3. Universal orientations are fundamental. Most marketers are focused on differences among customers that become the basis for market segments. At a deep, fundamental level, however, people are more similar than different. This underlying similarity can be difficult to recognize. As social psychologist Daniel Gilbert (2006) said in his recent book, “If you are like most people, then like most people, you don’t know you are like most people.”

In our work, we have identified a small number of universal orientations called *deep metaphors*. These deep metaphors structure and guide peoples’ thoughts, emotional responses, decisions, and behaviors (see Zaltman and Zaltman 2008 for extensive discussion of several deep metaphors). Any particular deep metaphor may be framed and expressed differently by different cultural groups, but the underlying deep structure of meaning is common to and shared by all (or most all) people. Understanding the relevant

deep metaphors that structure customers' thinking about a new product or a customer problem is an extremely valuable deep insight that managers can leverage.

4. Metaphors are the key to unlocking the unconscious. Metaphoric thinking—how we understand one thing in terms of something else—is a key mental process that is responsible for much (if not most) of our knowledge. According to prominent metaphor researchers Lakoff and Johnson (e.g., 1980, 1999), “Our ordinary conceptual system, in terms of which we both think and act, is fundamentally metaphorical in nature.”

Although not yet widely acknowledged in marketing circles, metaphors and metaphoric thinking are ubiquitous. As noted linguist Steven Pinker (2007) observed, “Metaphor is so widespread in language that it’s hard to find expressions for abstract ideas that are not metaphorical.”

To summarize, we suggest that developing successful new products requires a thorough understanding of the metaphors (conscious and unconscious images of meaning) that customers use to understand the product, its benefits, and its relevance in their lives. In turn, managers must create metaphors (“strategic” metaphors) that effectively communicate those core product meanings to customers. The ZMET process can help accomplish both objectives.

How does ZMET work?

The Zaltman Metaphor Elicitation Technique (ZMET) has been described elsewhere in detail, so here we will only sketch out the basic process (readers interested in more detail can consult Zaltman, 1997, 2003, or www.olsonzaltman.com). Very briefly, the ZMET process works like this. Several days prior to the interview, we recruit appropriate customers and ask them to find six to eight pictures that express their thoughts and feelings about the focal topic. Customers bring their pictures (which are metaphors for important, self-relevant thoughts and

feelings) to the interview. For about two hours they discuss the meanings of the pictures guided by the unbiased, open-ended probing of a highly trained interviewer. During the interview, the interviewer explores the meaning of metaphors elicited by the participant, which enables the participant to reveal deep (unconscious) thoughts and feelings about the topic. In this way we gain deep insights from customers.

Then in our analyses of the interview transcripts, we pay close attention to the various metaphors that people use to express or represent their thoughts, feelings and behaviors regarding the topic. Patterns in those metaphors are cues to the shared, deep (unspoken and largely unconscious) orientations that we call deep metaphors that are present in the minds of all (or most all) people. Exhibit 1 identifies several common deep metaphors along with brief explanations. A key output of our ZMET analysis is to identify the most relevant deep metaphors that structure how customers' frame the topic. As we and our clients learn about the deep metaphors and how participants frame them, we develop deep insights about customers.

Exhibit 1: Selected Deep Metaphors and Their Common Expressions

DEEP METAPHORS	EXPRESSIONS IN THE INTERVIEW
BALANCE	References to equilibrium, stability, equalize or compensate; Including both sides; Images of scales, teeter-totter, balance beam; References to reciprocity—give and take; References to “stable” emotional states such as calm, relaxed, serene; Feeling “right” with the world.
PERSONIFICATION	References to anthropomorphically treating a thing, brand or company as a person or attributing human-like qualities (personality, character traits, appearance) to it.
CONNECTION	References to connecting to things or people; Making an association; References to linking or attaching; To be a part of; to not be isolated from; Liking or loving someone or something; References to getting in touch with yourself; find your true self.
CONTAINER	References to being in (or out) of a place (house, room); References to keeping or storing; References to “in” and “out;” Keeping things out as well as in; Being wrapped up...or out in open.
JOURNEY	References to taking a trip; Following a path, choosing a direction; Getting there; The journey of life.
TRANSFORMATION	References to changing from one state to another—physical or emotional; Becoming something or someone else; References to evolving, maturing, growing;
TIME	References to the passage of time; Reference to past events or historical perspectives; Images of clocks and watches; References to old memories, remembering past events.
NATURE	References to nature, outdoors, natural world; Specific images of nature—rain forest, desert, woods; References to pure, unadulterated, pristine, uncontaminated and to wild, untamed, chaotic, stormy. References to breeding, evolving, growing.
FORCE	References to power, a powerful presence, or a source of energy; References to the consequences of force (getting hit; slammed, impact)

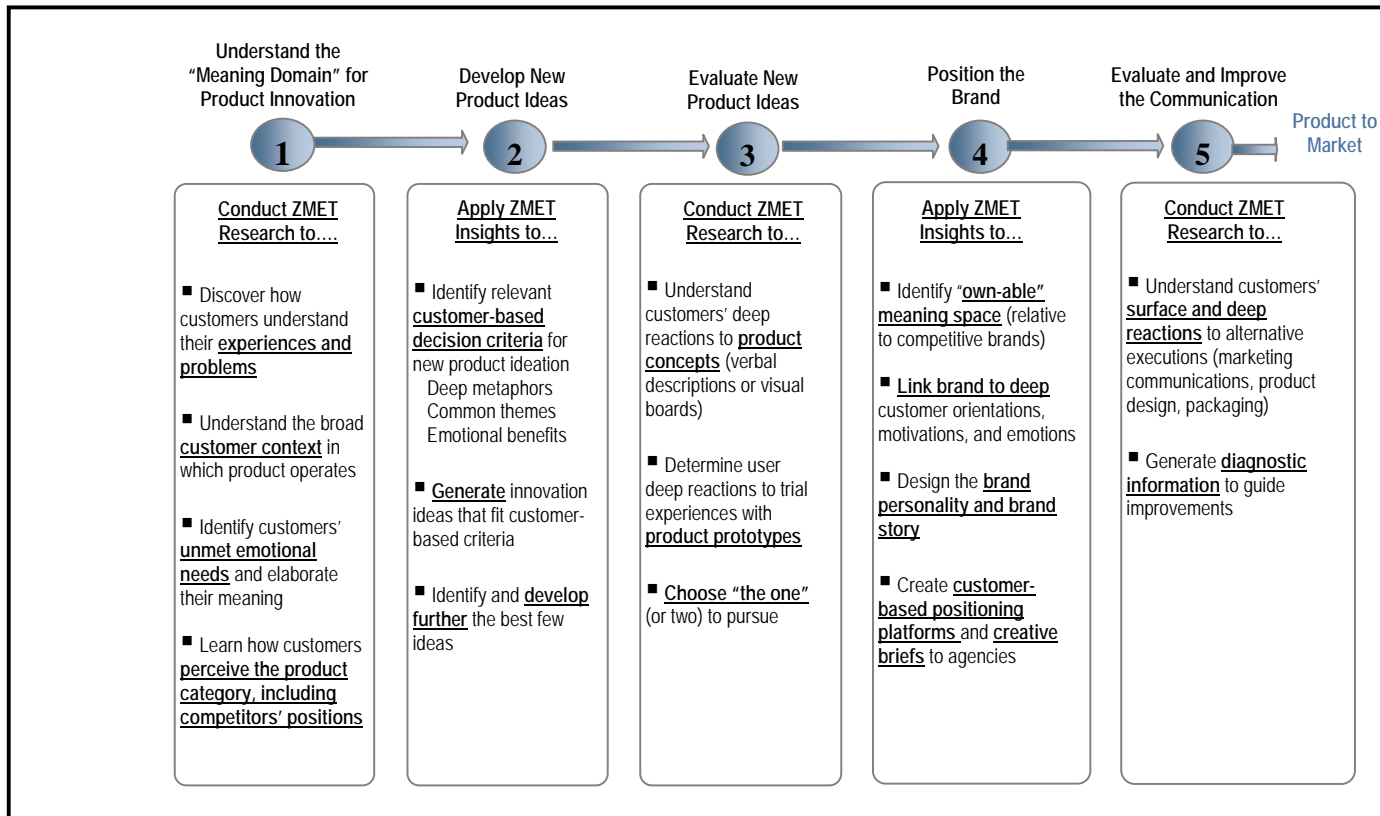
Incorporating deep customer insights in the innovation process

The key point of this paper is that a company’s IP should involve more than choosing and developing new features of a product or service. We believe that managers must also identify and develop the deep, unconscious, intangible meanings of their new products, as they simultaneously develop its tangible, physical attributes. Finding and developing deep insights regarding a product is equally as innovative as creating new physical attributes. Both product features and deep meanings should be managed in the IP.

Exhibit 2 presents an IP model of five stages and identifies various deep customer insights ZMET can provide at each stage. Note that ZMET can address upstream issues, at the very beginnings of the IP, such as understanding customers’ life context into which a new product must fit. Midstream in the IP, ZMET also can identify deep design criteria that can

guide the design of new product characteristics. And, downstream, ZMET can uncover customers’ deep emotional reactions to product concepts or actual product prototypes.

Exhibit 2: Applications of ZMET to the Innovation Process



Following, we illustrate the model by presenting six “case examples” that describe how firms identified deep customer insights via the ZMET process and then leveraged those insights in their IP.

Stage 1. Identifying the deep emotional drivers of a desired behavior

We have argued that the IP should be as concerned with developing innovative meanings that motivate potential customers to engage with a product as it is with creating new product features . An example is provided by a ZMET study designed to identify the deep, unconscious

motivations driving alumni of a major university to donate significant amounts of money to the university.

When asked about their positive giving experiences, most alumni described a version of “Hero’s Journey.” As we saw earlier, the HERO archetype is a universal deep metaphor, easily recognized in fairytales as the “prince” who overcomes obstacles to find the “golden fleece” or rescue the “damsel in distress.” Not all heroes, however, are from fairytales or are of the John Wayne or Superman sort. Mark and Pearson (2001) point out that some are “more reluctant Heroes who recognize an injustice or problem and simply rise to the occasion to do what needs to be done to remedy it.” This type of hero is “invigorated by challenge, feels outraged by injustice, and responds quickly and decisively to difficulty or opportunity.”

Some alumni described the university in metaphoric terms as a young child; abandoned and alone, struggling for independence against difficulties, yet idealistic—the ORPHAN archetype. This is relevant because “[Heroes] are instinctive protectors of those they see as innocent, fragile, or legitimately unable to help themselves” (Mark and Pearson, 2001). By helping to transform the organizations through their donations, alumni can feel heroic—deeply fulfilled and proud of “leaving their mark.”

Other alumni saw the university metaphorically as church-like, bigger and more powerful than the donor; these alumni characterized their donation as “contributing to a powerful priesthood.” This expression of the RULER archetype for the university led to rather different emotional feelings about donating. Rather than feeling like heroes helping a needy organization, these alumni felt less able to leave their mark on the already powerful university and, therefore, felt much less heroic.

In sum, these deep insights identified two different framings for donation behaviors. Understanding the different emotions that encourage and discourage donation helped the

university create innovative strategies and messages to address both types of donors and successfully motivate increased giving.

Stages 1 & 2. Understand how customers frame their problem

Many companies begin the IP without a deep understanding of how customers think about the problem the new product is intended to address. Although many companies conduct research on this issue, most studies result in a shallow understanding that provides minimal guidance to the IP. The ZMET approach can provide deeper insights into how customers frame their problem, and therefore can provide deeper guidance to managers as they create new products to address that problem.

A large manufacturer of hearing aids knew that approximately 80 percent of hearing impaired people refused to wear hearing devices, regardless of professional recommendations. Their IP was focused on how to make a hearing aid, obviously an undesirable product for target customers, more attractive. To learn about customers' problem, we conducted ZMET interviews with people who had moderate to severe hearing loss but did not use a hearing device.

The deep metaphor of THE IDEAL helped explain why many people with hearing loss avoid buying and using hearing aids. In American culture, as in much of the world, THE IDEAL refers to being strong, perfect, young, capable, efficient, complete, and beautiful. Hearing loss, in contrast, indicates weak, flawed, old, helpless, handicapped, broken, and ugly—opposite of THE IDEAL. Thus, many potential customers metaphorically framed wearing a hearing aid as a glaring neon sign shouting “I am flawed.”

“I wouldn't be normal anymore. Well, I'd be normal but you would know I had a problem, and I want everybody to think I'm perfect like everybody else.”

It's just like if I had a wooden leg and I limped all the time, that's not normal."

Participants in the ZMET interview also used THE IDEAL metaphor in framing a desirable hearing aid as inconspicuous, attractive, comforting, and luxurious with all the “bells and whistles.” However, even though existing products had some of these positive qualities, the overall negative meanings associated with hearing aids led many potential customers to avoid buying and wearing one.

Guided by the ZMET insights, the company developed a new hearing aid that leveraged the insights regarding THE IDEAL. Customers want to transform from flawed (with hearing loss) toward ideal (no hearing loss) without signaling to others that they are flawed and not ideal. The new product was inconspicuous (no signal), yet also relatively attractive, so that if noticed it could be seen as a high tech communication device rather than a traditional hearing aid. In fact, many customers who tried the innovative product felt comfortable enough to reveal it to others. For them, the new product became a symbol, not of weakness and deformity, but of their self-confidence and freedom.

Stages 1 & 2. Understanding customers' experiences and using deep metaphors to guide product design

At early stages of the IP process, deep insights into customers' experiences can help guide the design of innovative products. One example comes from the world of architecture. Several years ago, we conducted a ZMET study for an architectural firm that was contracted to design a new children's hospital. The goal was to identify the deep metaphors underlying peoples' thoughts and feelings about customer experiences in the current children's hospital and

convert those insights into “deep design criteria” that architects could use to guide their design of the new hospital.

We began by conducting ZMET interviews with child patients, parents, doctors and nurses and other hospital staff regarding their experiences in various “hospital spaces.” The deep metaphor of CONTAINER structured much of customers’ reactions to the current hospital. People used various undesirable CONTAINER metaphors such as “maze” and “prison” to express their feelings of being lost, confused, frustrated, trapped, anxious, and impatient. In the current children’s hospital, patients and parents felt cut off from the outside world and experienced a sense of loneliness and isolation.

*“I wanted to find a picture of a **very small box**, because that’s how I felt when we would be in-patients here, **like I lived in a box**. I had **no space**; my space was consumed either by medical needs or by sharing it with another family. You feel very **anxious**. You never know who’s going to walk in the door at any time. You didn’t know what was going on in the bed next to you. You didn’t know all that stuff, and I just **felt very closed in**.”*

Architects used CONTAINER as a key design criterion by continually asking themselves, “What could make the hospital a more inviting and pleasant CONTAINER?” In the interviews many participants contrasted their reactions to the unpleasant hospital container with the much more positive container of “home.” The home metaphor conveys feelings of normalcy, belonging and a sense of family. Home is warm, welcoming and comforting—everything the current hospital was not. Architects attempted to incorporate meanings and feelings associated with the home CONTAINER in the new hospital design.

*“I want something that in any respect is **calming, inviting**. Something visually to look at that might put a smile on my face so that your first instinct is taken*

away from the real issue of why you are there. That you see something that again, puts a smile on your face or lightens it for that moment when you first see the setting of the building.”

The ZMET interviews identified even deeper, more emotionally relevant hospital experiences framed by the deep metaphor of TRANSFORMATION. Hospitals are supposed to change patients from sick to healthy. We found that the hospital environment can have a powerful effect on customers’ thoughts and feelings about transformation. The existing hospital building, with its blocky structure and drab colors, implied stagnation more than change; it did not instill feelings of hope for transformative healing in those who entered. Three other deep metaphors were related to TRANSFORMATION : CONTROL (over one’s life and environment); CONNECTION (with the outside world, yourself and others); and FORCE (the need for certain types of energy and energy sources).

Having a sense of CONTROL empowers families for the medical challenges ahead and gives them confidence in a positive transformation. People felt more in control when they experienced cues of familiarity and comfort, as well as the privacy of “a place of their own.” Guided by this insight, architects designed spaces within the hospital environment that enhanced feelings of control: more spacious hallways to give the heightened sense of control when moving about within the hospital; open spaces to provide a sense of safety and security; and rooms designed to provide greater privacy and a degree of personalization. Architects also enhanced customers’ feelings of control over illness by designing various means of “escape” through music, bright colors (to stimulate people when bored), and soft colors (to relieve stress), as well as nature-based items such as plants, flowers, running water, and natural light. For example, an outdoor “Healing Garden” gave patients and parents a means of physical escape (CONTROL) from

the stressful confines of the hospital building out into a soothing natural space (a more attractive CONTAINER that activated unconscious feelings of TRANSFORMATION).

Peoples' hospital experiences involved many types of CONNECTIONS, including relationships within the hospital (staff, patients, parents), associations with the external world (family and friends outside the hospital), and connections to one's self (alone time). By designing room spaces that foster connections between patients and parents, architects sought to help patients and parents feel "normal," like a "family at home," and thus enhance the transformative healing process. They also created playrooms for child patients to connect with other kids and provide a distraction from worry.

FORCE was another important deep metaphor, because people in the hospital have a recurring need for physical and emotional energy. Energy gives patients (and parents) the strength and motivation they need to overcome their illness and transform to health (or, in the case of terminal illnesses, to transform emotionally and spiritually). Using FORCE as another deep design criterion, architects designed various spaces in the hospital to provide appropriate levels of energy. Anxious parents could use the outdoor gardens, chapel and library to reduce energy levels (fear and anxiety) and become more relaxed and calm as they refocused or cleared their minds. Other areas such as children's playrooms, adventure settings, and gyms were designed to increase energy levels, reduce boredom, or provide distractions from anxieties and fears.

Finally, architects returned to TRANSFORMATION as the central deep design criteria. They added a great deal of color to the building exterior and first floor entrance to inspire feelings of hope for a successful transformation from sickness to health, from helplessness to empowerment, and from anger or depression to inner peace. A prominent metaphor of TRANSFORMATION expressed consistently in the interviews was the butterfly that changes from caterpillar to pupa to

beautiful butterfly over its life. Architects incorporated the butterfly as a design motif throughout the hospital. For example, the aptly named “Transformation Corridor” through which most patients enter the hospital was filled with bright images of butterflies emerging from cocoons, an iconic example of “transformation.”



Transformation Corridor



First Floor Entrance



Exterior View



Healing Garden

Stages 1 and 4: Understanding the customer’s life context

At the very beginning of the IP, managers can benefit from a deep understanding of the customers’ life context into which their new product ideas must fit. The following example is

from a ZMET study conducted for a major agricultural company. The original research objective was to understand how farmers think and feel about the crop seed they buy and plant.

Most seed companies position new products in terms of physical product attributes (disease resistance, seed quality, etc.) and/or the functional benefits provided (higher yields, less need for weed control), and most marketing programs evidence very little emotionality. Thus it was surprising that few of the pictures farmers collected dealt with the physical attributes or functional benefits of crop seed. Instead, most farmers focused their ZMET interviews on the psychological and emotional meanings of farming—the context of their farming life into which crop seed, along with many other things, must fit.

A key insight was that small family farmers see themselves as heroic figures performing a difficult, yet vital public service. The HERO archetype is a universal deep metaphor widely prevalent in myth, literature, and film—essentially in all forms of storytelling. According to mythologist Joseph Campbell (1968), characters in literature (and real people) acquire heroic qualities when they progress on their journeys to accomplish an important and often difficult goal. The HERO'S JOURNEY begins with a call to action, followed by acceptance of the call, often after initial resistance. As the journey continues the Hero encounters opponents and allies; overcomes various obstacles, and is either successful or fails in reaching the intended destination. Eventually the Hero returns to the world where the journey began. (e.g., Pearson 1991).

Most farmers told stories that included many features of the HERO'S JOURNEY. Several described the almost mystical calling that compelled them to take up farming and stick with it. Many farmers used metaphors that implied a part of them would “die” if they could no longer farm (e.g. “Farming is *my life*.” “Farmers *live and breathe* what they do.” “Farming is *in my blood*.”). A few farmers described how they initially resisted the call by taking desk or factory jobs, only to find the attraction of farming impossible to resist.

*“I had a desk job for three years and had a promotion sitting in front of me when I made the decision to go back to the farm. There **wasn’t very much deciding to it**. I have a very good friend who grew up in Pittsburgh. His dad was an Ivy League graduate. When it was time to go to college, instead of going to an Ivy League school he wanted to come to Iowa State to learn how to farm, much to the distaste of his family. Today he farms up in Northeast Iowa and has a farm second to none. He **caught the bug**. He knows what it is like to walk out into that cornfield and know what that feeling is.”*

The deep metaphor of JOURNEY was expressed in several ways. Many farmers framed their farming experience as a set of nested journeys. At the broadest level, farming is “A Journey of Generations.” All of the farmers in our study were born into farm families and many had maintained or expanded farming operations inherited from their parents. Most farmers hoped their own children would “take the baton” from them and continue the family farming tradition.

Nested within the “Journey of Generations” is the shorter “Journey of My Farming Life.” Here each farmer explained how they grew personally as they became more skilled and described how their farm has changed since they first started farming. One participant used the metaphor of a Slinky (a spring-like children’s toy) to express how he had adapted to changing economic conditions:

*“This [Slinky] represents that **you’ve got to be flexible**. You learn in farming that **change is inevitable** in the business. In my township where I live, there’s 20 sections. We’ve only got seven full time farmers, but 25 years ago we probably had 50. They are doing other things. So if you haven’t changed as it went along you’re a statistic. So **you have to adapt and go forward**.”*

Another expression of the JOURNEY deep metaphor is “The Journey of a Workday.” One of the appeals of farming is that, from the beginning of a day to the end, farmers don’t know what might happen. Each day is different and surprising, and therefore interesting and engaging. One farmer used the metaphor of a fallen tree across a road to express the obstacles that he had to overcome on his daily journeys. The tree represented unexpected changes in the weather, machinery problems, glitches in the economy, or governmental policies that require thoughtful, creative solutions.

A nearly universal finding was that, despite all the challenges, HEROIC family farmers continue on their JOURNEY seeking to fulfill their mission, which farmers’ described as contributing to the betterment and stability of society. Farmer-heroes not only provide food for the world, but they also frame themselves as the unheralded “real environmentalists” because they care selflessly for the land and preserve it for future generations.

*“We’re **saving soil and doing stuff for the next generation.** Somebody’s going to have to eat down the line. Why do we even worry about it? I don’t know. I suppose somebody cared about me, whether I got something to eat. Why would you go in the service? Somebody did it for you before. Somebody carried a rifle for you. So I suppose you should go carry a rifle for them. A lot of people don’t think that way now. It’s your **values or how you was brought up, I suppose.**”*

In sum, the deep insight of the HERO’S JOURNEY provides an explanation for farmers’ intense feelings of accomplishment and pride. Farmers feel a deep sense of satisfaction when they face and conquer the yearly challenges of growing and harvesting a successful crop. They feel intensely proud as they reflect on their farming career and look forward to the day they can pass along their farming operations to their children.

The agricultural firm leveraged these ZMET insights in an award-winning advertising campaign. The campaign was designed to show that the company understands and deeply respects farmers' calling to the farm and recognizes their deep-seated pride in their farming work. Moreover, the campaign subtly claimed that the company's dedicated efforts to develop innovative crop seed were motivated by a sincere desire to help farmers on their heroic journeys. One print ad depicted an elderly farmer walking hand-in-hand with a young boy (presumably his grandson) down a gravel pathway toward a barn and a cornfield. The caption read, *"You own the land for a time. But you know it's borrowed."* The text beside the image read, in part, *"You plant. You harvest. You continue to face a never-ending diversity of daily challenges that can never be predicted. Meanwhile, the people representing [company] continue to research and develop seed products for the way you farm."* Another ad in the campaign depicted a farmer and his father intently studying a soil sample amidst a verdant field with the caption, *"Which came first, the chicken or the egg? Neither. The Farmer."* This was supplemented by language implying that the company's research and development arm was an "ally" on which the farmer-hero could rely.

Besides helping managers think deeply and strategically about how to promote its product innovations, these deep insights can guide how managers select and develop new products to better service farmers' needs. For example, what kinds of customer services could this company and its dealers provide to help farmers heroically overcome the obstacles they face on their daily journey? What sorts of products could be developed to enhance the land that someday will be passed to the next generation? Further afield, could the company facilitate the "Journey of Generations" by offering estate planning services tailored specifically to farmers' needs? In sum, the deep insights into the emotional context of farmers' lives led to more effective positionings of continuous (minor) innovations (like most advances in crop seed

technology) and opened managers' eyes to possible unmet needs which could be satisfied by more disruptive, discontinuous innovations.

Stages 3 & 4. Understand the job customers want a product to do and position the product accordingly

Ideally, the IP should be guided by a deep understanding of what customers expect a new product to do. Metaphorically, managers need to understand how customers frame the “job” they are “hiring” a product to do. Several years ago, a consumer goods company developed an innovative product to “fix” the color in clothes (keep them from fading over multiple washings). The product was in test market for months but achieved only minimal market penetration, even though the advertising won numerous creative awards and the product was functionally effective. Seeking answers, the company commissioned a ZMET study to understand customers' deep thoughts and feelings about the “job” of caring for their colored clothes. The goal was to build market share by developing an innovative position based on the deep insights and then clearly communicate that position to customers.

Perhaps the most fundamental insight from the study was that clothes are “alive,” and each article of clothing is on its LIFE JOURNEY. Metaphorically, clothes begin their life cycle with birth (manufacture or purchase) and continue through childhood (first few wearings) to maturity, and eventually end with death (discard). Clothing was seen as childlike, helpless, something that needed to be cared for, qualities that express the INNOCENT archetype, another deep metaphor. Female customers in this study saw themselves as CAREGIVERS (another archetype) who are strongly motivated to nurture and protect their clothing. CAREGIVER customers want to prolong the life of their clothing; they want their clothes to retain their “youth.” However, the act of caring for one's clothes by washing them paradoxically “harms” them by causing clothes to fade

and lose texture and shape. In other words, caring for clothes actually causes them to “age,” until eventually they are downgraded to less important, more mundane uses (gardening clothes). Finally, one’s clothes “die,” at which point they are discarded. When clothing, especially favorite items, dies and is discarded, customers feel that they have wasted money and feel somewhat sad and even a bit depressed.

*“I would feel desperate that something nice had been wasted. Say it was a favorite item and you obviously liked it, **it’s like it’s dead. It’s like a death** in a way. You would **probably never wear it again.**”*

In contrast, when customers talked about their new, bright and colorful clothes they used metaphors of staying young and having a long life. The new product avoided (or postponed) negative transformations by preserving colors and textures, effectively staving off “old age.”

When asked to characterize the new product, many women used metaphors such as maternal, caring, and confident., Interestingly, these were the same CAREGIVER characteristics that many customers saw in themselves as wives and mothers. Because the product helped customers feel like responsible CAREGIVERS and because they were happy about saving money, they felt better about themselves. These deep insights helped managers re-position the brand as it moved from test market to more widespread distribution and create more emotionally resonant marketing communications.

Stages 3 & 4. Understanding customers’ deep reactions to a new product prototype to guide brand positioning

As the IP proceeds, managers may need to understand customers’ deep reactions to a new product prototype. Such insights can guide product redesign and also provide ideas for a

positioning strategy. We used ZMET to help a major oil company understand customer reactions to a new product designed to enhance engine performance. Participants were given two product samples to use in their vehicles over a three-week period. Then they selected images that expressed their thoughts and feelings about the product and what it did for them and their vehicles.

Most participants structured their new product experience in terms of the deep metaphor of TRANSFORMATION. Nearly everyone believed the new product improved engine performance, but they framed that change in different ways. Some customers used metaphors of strength and power to describe the transformative effects on their vehicles. For example, several participants collected pictures of horses galloping or racing to express the increased power they thought the product added to their engine.

*“My car **ran like a thoroughbred**. It ran fast and drove better. It was **running at its best**.”*

Other customers used metaphors related to smooth running or absence of vibration and hesitation to describe the improvement in their car’s performance. For instance, one participant compared driving the car with the additive to being in a hot-air balloon.

*“A hot air balloon ride is **very smooth**. You’re up in the air and **you don’t feel anything**. You’re just up there. Using the product, **I wasn’t feeling a lot of bumps and hesitations** like I normally would.”*

Other customers believed that the product “cleaned out” their vehicle’s engine, while some believed it improved fuel economy. In short, while most customers agreed that the new product “worked” (it had a transformative effect), the ZMET metaphor analysis revealed divergent understandings about what the product actually did and how it worked.

At a more personally relevant level, the perceived improvement in their vehicles' performance led to feelings of TRANSFORMATION for the driver. Several customers described feelings of personal power, strength, and superiority when driving with the new product. Many people used images of powerful animals, armed warriors, and triumphant heroes to describe their own emotional transformations.

*“This is a picture of a **wolf pack**. Out on the road you feel like you **either could be the predator or the prey**. With this product I felt like **I was part of the pack; I could run with these folks** on the way to work. Without it, I feel like a scrawny, 98-pound weakling among the populace.”*

We often find that customers anthropomorphize important objects (even brands) by treating inanimate objects as alive and active, with an ability to think and feel, and possessing a personality. This reflects the deep metaphor of PERSONIFICATION. In this study, virtually all customers spoke metaphorically in ways that suggest their vehicle and/or engine were “alive,” and in need of “care” from their owners in order to “perform well” and have a “long, healthy life.”

*“When you hear things you are not supposed to hear, it makes me cringe. Right now **my grandson** is starting to walk and I see him walking and there’s this coffee table sitting there and he’s falling toward it, and I’m like ‘**Oh, God! Don’t do that!**’ When you hear strange noises from your engine, it’s just like that.”*

In turn, the deep insight that “my vehicle is alive” framed how customers interpreted the new product, which they described, metaphorically, as a kind of nutritious food, vitamin, medication, or routine hygiene for the vehicle and its engine.

*“It’s just like me **brushing my teeth to keep my teeth in my mouth**. That’s just something you should do. And if this product works to make your car perform better then it is something I want to do to **keep my car going as long as it can**. I know I’m giving my car something that will make me feel better and **make my car feel better**.”*

This example demonstrates the value of deep customer understanding as the IP nears its end. Although these customers interpreted the effects of the new product in different ways, the deep metaphors of TRANSFORMATION and PERSONIFICATION provide a common, deep meaning structure for those ideas. Understanding those deeper insights about customers provided a wealth of ideas for the company to use creatively in positioning this innovative product.

In Sum

Most traditional market research concerning the IP provides surface level insights about whether customers “like” a particular product or how customers feel about specific attributes and functional consequences. In contrast, ZMET, through careful metaphor elicitation and analysis, is able to reveal customers’ deeper, unconscious thoughts and feelings. Managers can use these deep insights from customers to develop deep insights about customers, which then can guide their decisions at all stages of the IP. The six examples presented here reveal how understanding deep customer insights can inform the very beginnings of the IP as well as middle and end stages of the process. We strongly believe that identifying the deep meanings that structure customers’ orientations to a new idea or product and then developing the marketing implications of those deep insights is at least as innovative and important as creating the actual new product. Deep customer understanding should be integrated with product development throughout the innovation process.

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