A group of people, seen from behind, are standing in a grassy field. They are all making heart shapes with their hands, holding their fingers together to form the outline of a heart. The scene is overlaid with a large, semi-transparent graphic consisting of overlapping circles in shades of purple, pink, and teal. The overall mood is positive and community-oriented.

Consumer Insights at Every Stage of the Customer Lifecycle:

THE ESSENTIAL GUIDE



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INTRODUCTION

Today's most successful brands have one thing in common. They are hyper-focused on the voice of the consumer.

Consider, for example, Amazon. The mega-brand's self-expressed brand promise is "to be Earth's most customer-centric company." Has that commitment to customer obsession paid off? In July 2020, the company's worth hit an all-time high of [\\$1.5 trillion](#).

Another example is Netflix, a company that has invested millions in understanding what its customer base wants and developing technology to, not only deliver what customers specifically ask for, but also make recommendations based on AI-powered analytics to delight customers even more with content that matches their tastes.

As of the third quarter of 2020, the number of Netflix subscribers worldwide was a whopping [195.15 million](#).

These are just two examples, but they illustrate the point. Focusing attention on the voice of the consumer is a recipe for success for your brand. To really understand how to meet the needs of consumers, though, you must focus on every stage of the customer lifecycle, not just the beginning of your relationship with potential customers.

The need for agile insights has never been greater. Companies are investing in strategies that will help them evolve just as rapidly as the world around them. Consumers today expect brands to be "always on" and expect brand messaging to be continuous and ever-evolving with the tastes and trends of the moment. To achieve that kind of agility, companies must conduct research at multiple touchpoints with an eye to embedding conversion into the process.

This ebook explores:

- Why it is important to capture the voice of the consumer throughout the customer lifecycle
- How to discover what consumers are thinking and feeling at every stage of the customer lifecycle
- Which questions and tools researchers should be using to uncover consumer insights at each stage
- How to use quantitative and qualitative research to inform every customer interaction





THE CUSTOMER LIFECYCLE: STAGES AND GOALS OVERVIEW

Volumes have been written about the customer journey, the customer lifecycle, and the customer experience along the way. However, for the purposes of this guide, we will discuss the customer lifecycle using the following broad stages:

Awareness

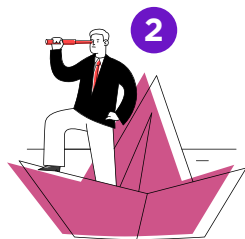
This is the initial stage when consumers first become aware of your brand. In the awareness stage, the consumer may or may not be aware of a problem that your brand can solve or a need that your brand can meet.

Marketing goal: Generate brand recognition, create positive consumer feelings for the brand, and position the brand to be part of the consideration set when consumer needs arise.

Research goals: Recruit a target audience and learn if that audience is aware of your brand. If so, what do they think of it? Is the target audience aware of your competitors? If so, what do they think of them? How does the target audience talk about products like yours and what kind of language do they use to describe the products?



1 AWARENESS



2 CONSIDERATION



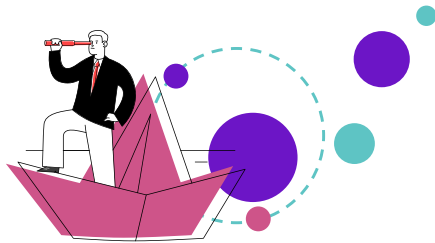
3 PURCHASE



4 RETENTION



5 ADVOCACY



Consideration

In the consideration stage, the consumer has clearly identified the problem and is actively looking for a solution. This stage often includes consumer behaviors such as comparison shopping, additional research, reading customer reviews and testimonials, reading case studies, asking peers for recommendations, and so on. The consideration stage is more proactive from the consumer's point of view than the awareness stage.

Marketing goal: Provide a compelling argument in favor of your product or service. Provide content that educates, informs, and tells your story in an engaging way. Stand out from the crowd through thoughtful differentiation.

Research goals: Discover hidden behavioral triggers. Examine motivations and emotions of consumers. Use qualitative research to determine the “why” behind their decision-making process. Determine what steps to take to move the consumer to the next stage in the customer lifecycle, the purchase stage.



Purchase

The purchase stage is divided into two main phases: the decision to purchase and the actual process of purchasing. Consumers at this stage are at the critical point of decision. Will they purchase, or won't they? If they decide to purchase, will they complete their purchase, or abandon the process for some reason without completing it? For some products or services, this process can be lengthy, whereas for others, it can take just moments. Regardless of where your product falls in this spectrum, having insight into consumer thoughts and feelings at this point is essential.

Marketing goal: Close the deal. Reduce friction and make the purchase process as seamless as possible.

Research goals: Discover what consumers expect of the purchasing process regarding price points, ease of purchase, shipping options, etc. Discover whether customers would welcome recommendations for add-ons or additional information at the point of sale. Discover payment preferences. Find out factors that might contribute to cart abandonment mid-purchase, and so on.

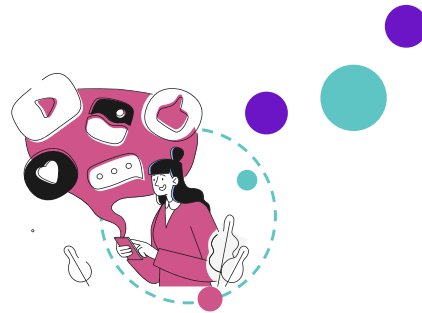


Retention

There are two main phases in the retention stage. In the first phase of the retention stage, consumers may be feeling a bit of buyer's remorse. This is the time when you need to ensure excellent onboarding and customer service and support to retain customers. The second phase of the retention stage pertains to growth and cross-selling or upselling. In this phase, you look for ways to add value for consumers by building a solid relationship and enabling them to use your products and services in the best way possible.

Marketing goal: Build strong relationships with customers, strengthening their connection with your brand.

Research goals: Discover how customers use your product or service. Explore user behaviors, collect product feedback on a regular schedule, find opportunities for product development and improvement, etc.



Advocacy

In the advocacy stage of the customer lifecycle, the customer becomes, not only a loyal user of your product or service, but an advocate – a person who actively recommends your brand to others. A brand advocate tells family, friends, and social media followers about your brand, putting it in a positive light. Brand advocates generate positive word of mouth, which is marketing gold.

Marketing goal: Build brand advocacy through multiple strategies.

Research goals: Explore customer after-purchase sentiments. Discover consumer preferences regarding advocacy programs, product support, customer experience initiatives, and so on.



CAPTURE CONSUMER INSIGHTS AT THE AWARENESS STAGE





In the customer lifecycle, awareness is the first stage wherein potential buyers first become aware of a brand. Brands and sellers can use this window of opportunity as a source of great consumer insights as well.

Consumers may be reluctant to talk with salespeople in the awareness stage because they are not ready for a sales pitch. How, then, can you capture the voice of the consumer at this delicate stage?

The answer lies in using a combination of quantitative and qualitative analytics to uncover consumer insights. Before discussing the tools to use, it is important to identify the questions that you want to answer with your research.

Questions to Ask in the Awareness Stage

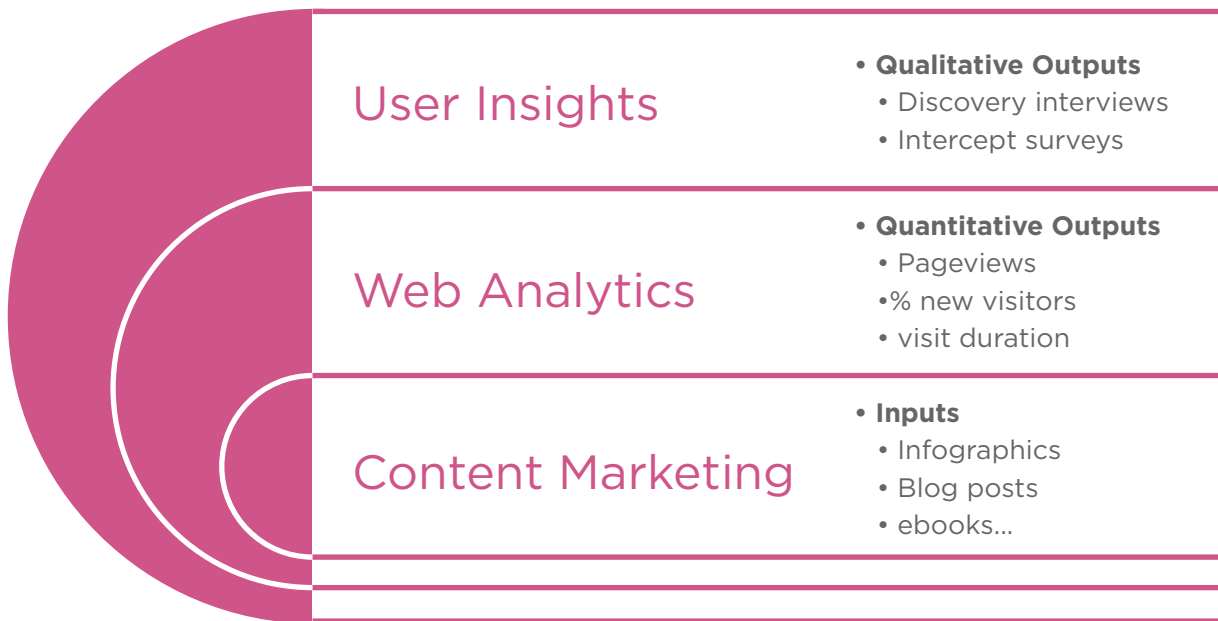
At this initial stage, marketers are often still building their customer personas, fleshing out the details of who their customers are and what their motivations are. To find rich answers to these questions requires an open-ended approach, but also one that incorporates a specifically designed question. For example, for a B2B brand that sells ERP software, rather than a question such as “What brings you to the site today?”, the question might be phrased as “What is your biggest accounting challenge right now?”


General research questions at this stage include:

- How did you come to know about our brand?
- What are your thoughts about what you have seen or heard about our brand?
- Are you aware of competitor A, B, C, or D?
- What are your thoughts about what you have seen or heard about brand A, B, C, or D?
- What problem are you currently trying to solve?
- What steps have you taken to try to solve this problem?
- What other solutions have you considered?
- Where do you generally go to learn about solutions to your problems?
- What do you think an ideal solution to this problem would be?
- What type of information would help you to find the solution to this problem?

Research Tools for the Awareness Stage

True consumer insights result from an iterative process that involves providing the right content marketing materials to address consumer concerns at the awareness stage, capturing web analytics for quantitative research into consumer online behaviors, and performing qualitative research to delve into the motivations and emotions behind consumer behaviors.





Common marketing materials to use at the awareness stage include:

- Broad advertising - commercials, print ads, digital display ads
- Relevant, informative blog posts and articles
- Videos
- Ebooks
- Whitepapers
- Checklists
- Infographics

To reach the right audience with broad advertising, you must find the right messaging or brand presentation. But doing so can be incredibly difficult and expensive, especially if you are trying to do it without solid research and analysis of your target audience. The best way to discover what your target audience will actually respond to in the way of advertising is to ask. Talking to a representative sampling of your target audiences about what they like, what they dislike, and what they typically respond well to is an essential part of the process of designing effective advertising and marketing campaigns.

After you have gained consumer insights, designed your marketing and advertising materials, and made them available, use web analytics and social media analytics to measure engagement with those digital assets. Metrics such as page views, percentage of new users, visit duration, and number of downloads reveal which pieces of content are resonating with potential customers. That, in turn, informs your future marketing strategy and helps you flesh out your customer personas more fully.

Then, it is time to use qualitative tools to close the loop. For instance, many brands use website intercept surveys to target visitors, understand their intent, and collect feedback to evaluate their online experience. For even more insights, live conversations with consumers at this stage give brands greater depth and breadth of understanding.


Discovery interviews are also essential ways to tap into the minds of consumers in the awareness stage of the customer lifecycle. Conversations with potential customers help brands respond to key questions. Well-designed discussion guides help moderators focus interviews on the specific research questions the brand has identified as important. Discussions can be conducted through focus groups or in-depth interviews (IDIs). Focus groups may be more effective in the early awareness stage, but IDIs tend to lead to greater volumes of qualitative data overall.





CAPTURE CONSUMER INSIGHTS AT THE CONSIDERATION STAGE





Consideration is the stage when potential customers have identified a problem or an opportunity and are researching their best options. Still not ready to commit, they want to explore different possibilities, compare alternate solutions, and get answers to questions that will help them make a better decision.

At this point, companies should put in place marketing demand generation programs that focus on generating interest or leads, transforming prospects into customers, and then nurturing those customers until they fulfill their long-term needs.

Questions to Ask at the Consideration Stage

Open-ended questions uncover consumers' motivations and behaviors to understand their decision-making process. Questions should center around the product, opportunities, and challenges that come with it, pricing and terms, website navigation, and the purchase decision, including comparisons with competitors' processes.

Research Tools for the Consideration Stage

Common types of marketing content to use in the consideration stage include:

- Podcasts and webcasts
- Guides
- Case studies
- Whitepapers
- Industry studies
- Product comparison charts

Quantitative tools to use include:

- Web analytics
- Social media analytics
- Online polls and surveys
- Paper questionnaires
-

Several key metrics can be tracked, such as individual post views, social media shares, and link downloads. Each of these can help marketers understand consumer behaviors and fine-tune their marketing funnel more tightly to meet customer needs.

At the consideration stage, in-depth interviews are especially useful to qualitative researchers, as they can uncover motivations and feelings behind consumer decision-making. Focus groups and selective website intercept surveys may also be used at this stage for additional insights.



CAPTURE CONSUMER INSIGHTS AT THE PURCHASE STAGE

At the center of the consumer buying process, purchasing is the main step to revenue and profit.

The purchase stage is divided into two different phases: the decision to purchase and the purchasing process itself. Both require different marketing tools and qualitative insights. Consumer insights at the purchase stage keep brands in the loop about how to drive conversions and increase revenue.

Purchasing Stage	Attitude	Requirements	Marketing Collateral/ Testing
Decision	Engagement Sense of security Additional reinforcement	Product information, brand knowledge Social media content, customer reviews Brand information, retargeting or email reminders	Content research Credit card purchase button Free trial/live demo Purchasing drivers analysis
Process	Convenience and option needs	Credit card, push button payment option, Shipment/ payment options, Fast-loading website, frictionless purchase and delivery	Free trial benchmarking Test keystrokes Transactional keywords Strong Call to Action SRO

Questions to Ask at the Purchase Stage

At the purchase stage, there are multiple lines of questions, depending on factors such as which phase of the purchase stage a customer may be in and where the purchase will be taking place. Here are some sample questions for consumers in the purchase stage:

Pre-decision:

- How does the price of this product compare to similar competitor products?
- How does the value of this product compare to its stated price?
- What factors cause you to hesitate to purchase this product (if applicable)?
- Have your needs changed since you began to research this product?
- Are you satisfied with the terms of purchase?

For online purchase pre-decision:

- What feature does this product have/lack that matters most to you?
- Do you feel you have a good idea of what this product looks like/does from the description on the website?
- How do the product images make you feel?
- How do you think this product compares with other products online or in a store?
- If you had to name one thing that would make you purchase/reject this item right away, what would it be?

For the purchasing process itself:

- How easy was it to add items to your online shopping cart?
- Were you surprised/disappointed/excited by any shipping or delivery options that were offered/not offered?
- How secure did you feel the online payment process was?
- Did you have to enter any personal information more than once during your purchase process?
- Were all your options clearly outlined at every stage of the purchase process?
- Were you satisfied with the length of time it took for your payment to be processed?


Research Tools for the Purchase Stage

Common types of marketing content for the purchase stage include:

- Testimonials
- Product reviews
- Social media mentions
- Discounts
- Comparative assessments

Qualitative research at the purchase stage involves the use of tools such as surveys and in-depth interviews that focus strongly on the customer journey. Tools such as exit pop-ups for surveys and automated outreach to those who abandoned items in an online shopping cart work well to capture customer sentiment on the spot.





For ecommerce, qualitative research must also include delving into the amount of friction in the purchasing process. Beyond website speed and navigation, the focus here should primarily be on the transaction options - factors such as mobility, shipping, delivery, and payment need to be simplified to the point of being non-issues.

Further, the online customer journey needs to highlight transactional keywords that buyers are looking for when they are in the process of making a purchase. These include actions such as buy, order, download, and demo. On the payment portion of the site, purchase buttons, credit-card input, shipping, and delivery fields should be easy to navigate.

Insights at this stage should focus on key metrics that help measure the performance of the website and optimize its transaction components. Benchmarking may also show why competitive brands may be better positioned. Consumer insights can be drawn from both extensive user testing and navigation process monitoring - including testing CTA buttons aimed at prompting web visitors to complete a purchase.

The B2B Process Is Different

For B2B deals, the process may be somewhat different, but the end results are the same. Qualitative research can still be used to understand how decisions are being made at the critical purchasing stage. In many cases, B2B companies may utilize a third-party vendor who specializes in closed-lost conversations to conduct in-depth interviews (IDIs) to assess why decision-makers for a target account walked away from a B2B deal with a specific brand. By conducting multiple interviews with key decision-makers within an organization or decision-makers with similar titles or job descriptions at several different organizations, brands can discover patterns that may reveal areas for improvement in their products or services.





**CAPTURE CONSUMER
INSIGHTS AT THE
RETENTION STAGE**



The retention stage is arguably one of the most important stages in the customer lifecycle. It costs about five times more to acquire a new customer than to retain an existing one, so from a purely financial standpoint, retention is an important business objective.

A successful retention strategy starts with ensuring customer satisfaction and then focuses on identifying potential advocates and cultivating efficient influencers for your brand. Effective retention strategies drive financial Customer Lifetime Value (CLV) – the amount of the money that a customer is expected to spend with a given business. The success rate of re-selling to a current customer is more than twice that of selling to new customers. Given that, it is plain to see that consumer insights at this stage are essential to success.

Customer attitudes	Company response	Insights
Buyer remorse	Return/exchange policies	Customer analytics, Interviews
Questions	Customer service Contact Center or stores	Contact center analytics to decode customer sentiment and intentions
Reviews	Facilitation through website	Analytics, CROs, win-loss surveys
Online Questions	Online support: tutorials, videos	CROs
Increased engagement, additional purchases	Outbound marketing, Customer service	CRM analyses
Additional purchases	Emails with discount	Email marketing metrics



Questions to Ask in the Retention Stage

Immediately post-purchase, questions should center around customer satisfaction. Then, as time goes by, questions about product use can provide great insight. Here are some examples of questions to ask:

- How was the purchase process for you?
- Were there any points in the purchase process that went more/less smoothly than you expected?
- What did you think of the onboarding process?
- Were any instructions that you received during the purchase and onboarding processes clear and understandable?
- Were your support options clearly explained?
- Were you satisfied with the support options provided?
- How do you use the purchased product in your daily life/daily work?
- Would you purchase this product again in the future?
- Would you consider purchasing other products from this company?
- Would you recommend this product to others based on your own user experience?
- Is there any feature you would change in this product?
- Were the support options offered adequate for your needs over the long term?

Research Tools for the Retention Stage

Common marketing materials for the retention stage include:

- User guides
- Product-focused blog posts
- Product updates
- Customer newsletters

Other research tools to use in the retention stage include contact center analytics, post-purchase survey tools, pop-up questionnaires, text messages, automated emails from your CRM, win-loss surveys, and, of course, in-depth consumer interviews.

Another useful tool for research at this stage is the development of customer communities or customer advisory boards (CABs). A customer advisory board is a select group of customers who come together on a regularly scheduled basis to share insights and advice with an organization regarding a product or service and the brand associated with it.

Similarly, brand communities are made up of customers who use a product or service and share their opinions with the brand regarding their experience with that product or service on a regular basis.


Qualitative research can help brands discover what would motivate a customer to participate in a CAB or community, how to set up such a community to attract the right customers, what kind of information to research via a CAB or community, what kind of interactions to initiate with community members, and how often to engage with the community for best results. Armed with that knowledge, brands can build strong customer communities, which will both strengthen their retention strategies and infuse the voice of the customer more fully into their organization-wide efforts at the retention stage.





CAPTURE CONSUMER INSIGHTS AT THE ADVOCACY STAGE





Brand advocates are not only customers for life. They are customer champions for your brand, but advocacy doesn't happen by itself. Being able to hear the voice of your customers and then act on what you hear organization-wide is the key to turning customers into brand advocates.

Questions to Ask at the Advocacy Stage

At this stage, people have already purchased your product, so your goal is to understand their after-purchase sentiments. General questions at the advocacy stage may include:

- Did the product fill your needs?
- When it's time to upgrade the product, would you choose a newer version of what you purchased from us?
- What do you like or dislike about the product?
- What would you change about the product?
- Has a competitor created a better product that would cause you to abandon this product?
- What will it take to maintain your loyalty?

Other advocacy questions may be specific to either a B2B or B2C audience. For instance, for a B2C audience, advocacy questions might include:

- What would cause you to return the product to the store?
- How likely are you to tell your friends or family about this product?
- How likely are you to talk about this product on social media?
- How do you use this product?
- How often would you say that you use this product?

For B2B audiences, some potential advocacy questions could include:

- How can we (your vendor/partner/supplier) help you with your career objectives?
- Do you want to be more visible in the industry through articles, webinar participation, speaking engagements?
- How do you want to be perceived within your company (thought leader, company champion, etc.)?

Building a Framework for Advocacy

One of the first ways to encourage advocacy is to put programmatic steps in place to help customers to talk about your products, services, and brand. Encourage them to tell their stories of how your brand has impacted their lives. Consider building brand advocacy through loyalty programs, social media promotions, or referral bonuses. Look at how each of these programs are designed, how they work now, how effective they are at encouraging brand advocacy, and whether they meet your customers' expectations. You can use both quantitative and qualitative research to find out the answers to these questions.

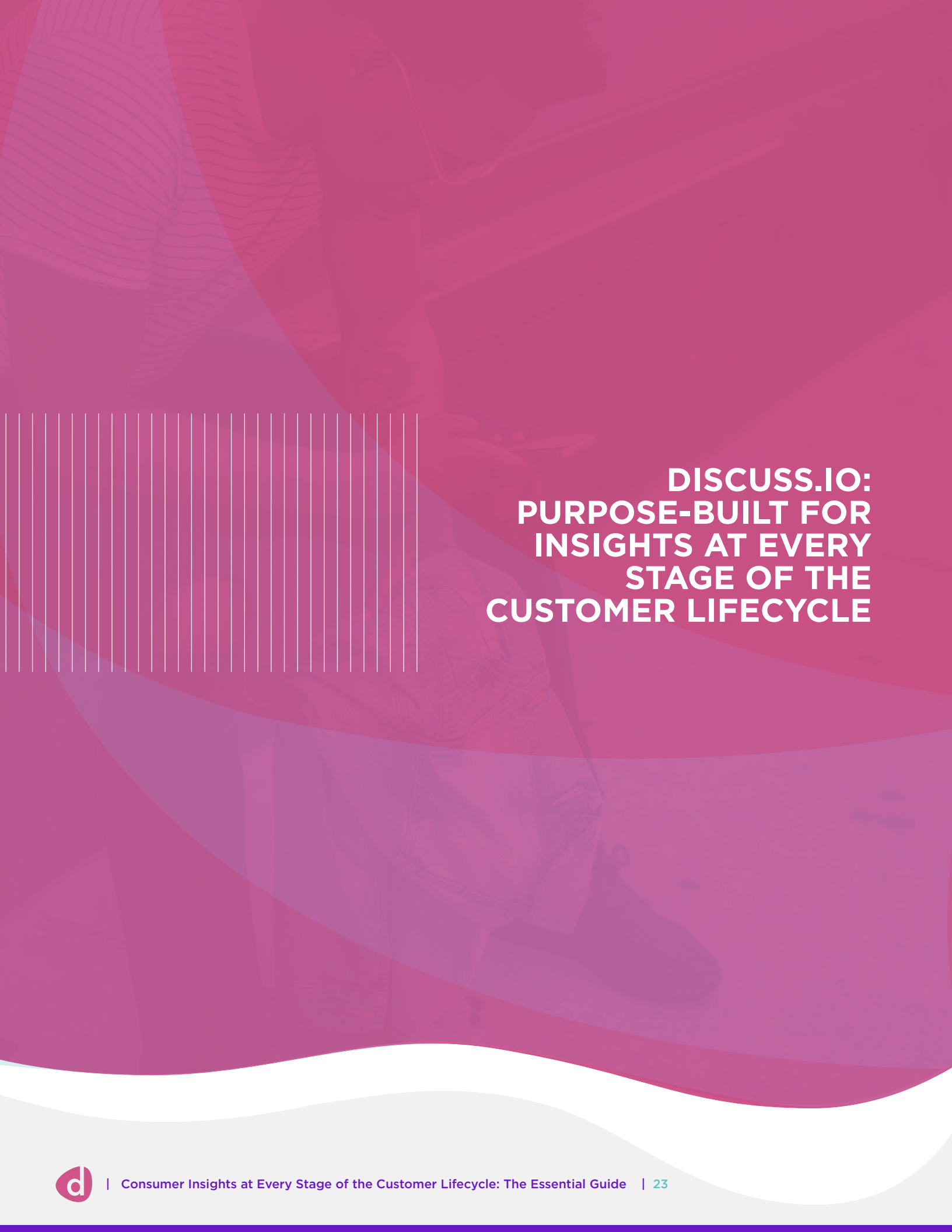
Research Tools for the Advocacy Stage

As is the case with other stages of the customer lifecycle, analytics yield considerable insight into consumer sentiment. Analyzing the results of your loyalty programs, rebate programs, and referral programs will help you see how your formal advocacy strategies are working. Social media analytics may help you monitor online reviews and social mentions, providing a bit more insight.

Surveys also provide insights, as do focus groups, consumer community groups, and social media fan groups.

However, the richest source of consumer insights is to go “straight to the horse’s mouth”, so to speak. Direct in-depth interviews with customers provide a detailed look at what they really think and feel about your products, services, and brand.





**DISCUSS.IO:
PURPOSE-BUILT FOR
INSIGHTS AT EVERY
STAGE OF THE
CUSTOMER LIFECYCLE**





Discuss.io is a purpose-built platform designed to help major brands connect with consumers and customers for conversations that capture insights that help businesses make smarter decisions faster. Discuss.io was built with the knowledge that thousands of hours of insights can transform a business. With each conversation that you have with customers on the Discuss.io platform, your organization's insights brain strengthens.

Discuss.io helps companies conduct the kind of agile, progressive research that uncovers insights at every touchpoint in the customer journey as the customer relationship evolves.

Much more than just another video conferencing tool, Discuss.io is uniquely designed to capture the voice of the customer at scale and share actionable customer insights with collaborators, infusing consumer empathy throughout your entire organization.

Here are just some of the features that make Discuss.io the perfect tool for capturing consumer insights at every stage of the customer lifecycle:

Saved Moments

One of the most popular features of the Discuss.io platform is the Saved Moments feature, which allows moderators and observers to save key insights with a simple click. When you click the "Save Moment" button, 15 seconds before and 15 seconds after are automatically rendered into an easily editable and shareable video clip. That means that the interviewer can concentrate on the consumer being interviewed, rather than on extensive note taking, all without worrying about missing key insights along the way.

Discussion Guides

Discussion Guides can be customized and loaded into your project prior to an interview. When the time comes for the interview to begin, the Discussion Guide will be displayed in the video meeting room display for the moderator. That way, the [moderator stays on track](#) and engaged during the interview. Because the Discussion Guide is attached to the project, all sessions within the project have access to the Discussion Guide. Even better, video clips can be sorted based on Discussion Guide questions.

Key Takeaways

Another stellar feature of the Discuss.io platform is Key Takeaways. Immediately following an interview, moderators and observers can quickly capture their biggest learnings in the Key Takeaways page. That page has questions which can be customized to address the specific objectives of the interview.

Company-Wide Search

Interviews and consumer conversations are organized in the Discuss.io platform based on project and team. However, anyone in your organization with access can search with keywords and watch videos from these conversations. This infuses the consumer voice throughout your organization, [building consumer empathy](#) and driving a consumer-focused culture.

Built-in Privacy

Unlike many video conferencing tools that were originally designed for families and friends to share informal moments together, Discuss.io was purpose-built for market research. That means that we take customer and client privacy very seriously. That's why the Discuss.io team and technology are built with the strictest compliance in place. In 2019, Discuss.io was officially recognized for its security compliance, being awarded an [ISO 27001:2013](#) certification by [CIRQ](#).

In addition to these platform features, Discuss.io offers professional services for enabling an end-to-end market research solution. Our professional services include:

- Project management, including screening candidates, organizing schedules, and coordinating with service providers
- Finding qualified participants for interviews and focus groups
- Moderation services
- Discussion guide writing
- Translation services
- Human transcription
- Report writing
- Live tech support

Regardless of the level of support you need for your qualitative research, Discuss.io has the tools and support to help. Partner with Discuss.io to capture consumer insights at every stage of the customer lifecycle. [Get a demo](#) to see what Discuss.io can do today.





Ready to see Discuss.io in action?

[Schedule a free demo](#) today.

SCHEDULE A FREE DEMO

