productboard

How to Gather and Leverage Deep User Insights

A Guide to Becoming a Customer-Driven Product Organization

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Why deep user insights are a core pillar of Product Excellence

Through thousands of conversations with the product community, we've discovered that the most successful product makers share three areas of mastery: deep user insight, a clear product strategy, and an inspiring roadmap. These are the three pillars of what we call "Product Excellence."

deep user insight
(noun)

A state where
the entire product team
has a shared understanding
of what users really need

Let's start with a definition. When we use the term "deep user insight," we mean that the entire product team has a shared understanding of what users really need.

How do they achieve this understanding? By gathering and organizing all incoming feedback into a central repository that is accessible to all.

Deep user insight doesn't just take place at one level or on one team—it's a concerted effort that involves people from the entire organization.

In the top customer-driven product organizations, everyone is equipped with an understanding of user needs. This allows them to excel in their work—whether that's prioritizing, designing, developing, promoting, supporting, or selling. After all, product touches every team, and everyone benefits when it is excellent.

Deep user insights help you build the right products in the first place

Product makers become disconnected from what their users need for a number of reasons. Perhaps your organization is sales-led, and your features reflect the needs of your most important prospects but neglect your long-term product strategy. Or, your product team applies a subjective lens and builds to solve their own problems, neglecting the needs of their target personas.

To put it simply, failing to achieve deep user insights leads to the wrong products. Teams that rely on assumptions rather than data spend weeks, months, or even years working on products that either fail or end up underutilized.

"Engineers assume the world is much more technical than it is. For Sales, every deal that comes through the door needs special work, special features, special onboarding, or something custom. Executives tend to rely on selective recall or recollections from their own days as subject matter experts. Sadly, this results in products that don't reflect the needs of a company's overall customer base."

Rich Mironov
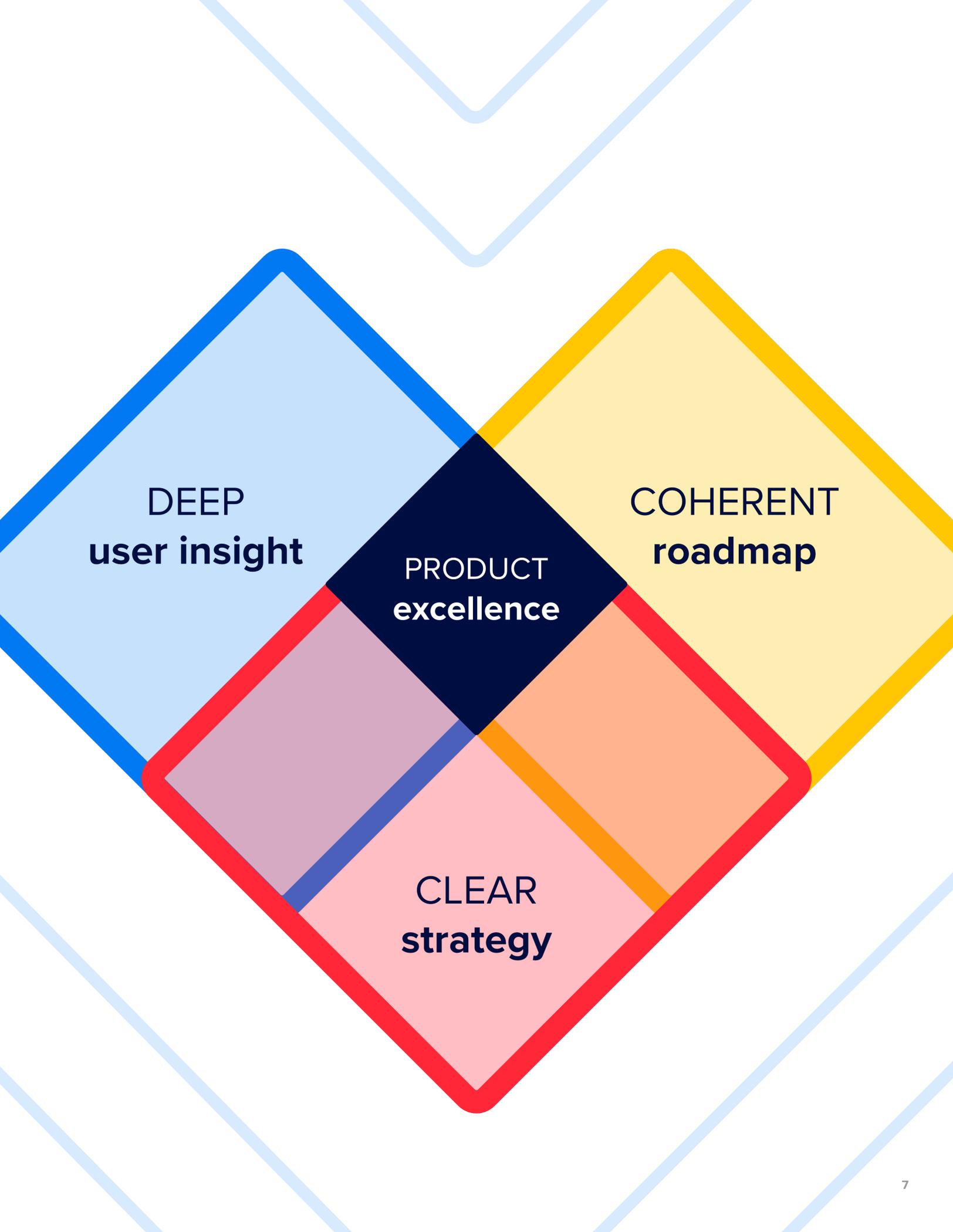
DEEP
user insight

COHERENT
roadmap

PRODUCT
excellence

CLEAR
strategy

"Deep user insight doesn't just take place at one level or on one team— it's a **concerted** effort that involves people from the **entire organization**

The path to deep user insights

We've created a rubric to illustrate the five levels of proficiency when it comes to gathering deep user insights. Take a moment to look it over and see which level most accurately describes your current practices.

If you're not at level five yet, don't worry. We'll be walking you through each step and making recommendations for how to get there in the following chapters.

1. I know it all

Product managers follow their intuition around what users need without validating it in any way

2. Product managers talk to users

Product managers collect feature requests but convert them directly into product requirements without seeking underlying user needs. They miss significant opportunities and frequently deliver features that go unused

3. Product teams listen to users

Product teams capture user feedback from all available sources and strive to uncover underlying needs, but overestimate their ability to do so and make costly, incorrect assumptions

4. Product teams understand users

Product teams gain deep user insights by performing continuous product discovery—validating both problems and solutions—and employ their findings to deliver the right features, designed in the right way

5. Everyone understands users

The whole company, not just product teams, has access to user insights. Everyone intimately understands what matters to users & why; they are empowered to do right by the user when prioritizing, designing, developing, marketing, supporting, and selling

A step-by-step guide to gathering deep user insights

Product discovery is the process of actively capturing, researching, and prioritizing user needs—as well as collecting and validating solution ideas for addressing them. Because why risk investing in the wrong products and features if there is a way to ensure that you're always building the right thing?

Deep user insights are an essential component of product discovery that feeds every step of the process. Still, many product makers aren't sure what to do with the onslaught of feedback coming in from all corners of the organization. If organizing all this information is already overwhelming, then making sense of it can seem next to impossible.

That's why we put together this guide. Follow the steps below to start transforming fragmented product inputs into deep user insights that you can incorporate into your discovery process.

Conduct an audit of your existing user and product inputs

The first step is to understand all the places where you currently gather insights. Consider all the different touchpoints that people at your company have with end-users. These can include:

- Email exchanges between your support team & customers
- Win/loss analyses
- Conversations between the sales team and prospects
- Exit surveys (conducted by customer success when important customers churn)
- Qualitative inputs from NPS results
- Customer support tickets
- Existing user research
- Feature requests

As you complete this audit, note which tools or platforms are used to collect information. You'll likely find a smorgasbord of emails, Google Docs, internal communication tools, note-taking apps, and department-specific tools like Salesforce and Intercom.

Once you have a holistic overview of your insights landscape, assess them against the problems you are trying to solve for customers. Can you identify trends and patterns in all the collected inputs that help you better understand what's working for users, and what isn't? Are you able to identify the needs of a certain type of customer? Can you quickly locate all insights related to a specific feature idea or user need?

These are all important questions you should aim to answer.

Regularly interface with customer-facing teams

As a product maker, you're likely several degrees of separation away from your end-users. That's why it's crucial to interface with sales, support, and customer success—your customer-facing teams— to access a treasure trove of insights from the frontlines.

Running interviews with customer-facing teams to share, rank, and elaborate on user needs can yield many gold nuggets of actionable information. Customer-facing teams speak with so many people that they've probably already begun to identify patterns. And since they understand your business and product, they can interpret these insights within a relevant context.

Of course, you won't always do precisely what customer-facing teams suggest. As a product maker, you'll have to synthesize incoming information and weigh it against your objectives and capabilities. Still, getting these inputs is a critical step that will deepen your understanding of user needs.

Make it a habit to talk to customers

Taking the time to talk to a wide range of users often takes a backseat in the high-pressure environment of the tech world.

"You've got to invest time into figuring out who your product is for, what job it will do, and why users will pay you for it. This means actually talking to people who use your product, those who have churned off, and anyone in-between."

Product thought leader **Rich Mironov**

How to build a habit of talking to customers

Set aside time to regularly talk to customers

Go visit your customers once a month to observe them in their work environment, for example. Or plug an hour a week into your calendar for customer interviews over Zoom.

Let colleagues know you're always interested in talking to customers

There will always be prospects and customers who are eager to give product feedback. It's your job as a product manager to let your customer-facing teams know to send these folk your way.

Join calls with prospects and customers

This is both an opportunity to sell them on the roadmap and gather useful feedback on your vision.

Keep a short list of target customers that you can reach out to

Identify enthusiastic users of your product who are open to speaking with you and check in with them regularly.

Build a customer community

The way you go about this is your choice. At productboard, we have a #productleaders Slack community where we announce new features, share key announcements, and generally keep an open line of communication with customers. Our #beta-testing channel, for example, fosters dialogue about specific feature sets and areas of the product.

The great thing about this community is that it helps us identify who our power users are and talk to them at scale. Even better, customers are riffing off of each other's ideas.

Set up a system to consolidate product inputs from all sources

In a typical organization, teams use many tools— like Salesforce, Zendesk, and Intercom, to name a few—to manage their interactions with prospects and customers. Each of these platforms is home to a goldmine of feedback: unmet needs, problems, reasons for churn, why a prospect opted for your competitor, and more.

However, unless you have access to these platforms and regularly check in on them, many of these insights end up slipping through the cracks.

That's why it's essential to have a system that syncs with your existing tech stack and automatically funnels in all incoming inputs. This central repository allows product teams (and everyone else) to have continuous access to fresh insights and easily track and make sense of different feedback types.

Act on the insights!

In the next chapter, we're going to look more closely at how you can begin to act on the insights you've gathered.

For now, remember: It's not enough to take feedback at face value. As a product maker, you must be willing to put your detective hat on to dig deeper into more significant problems or unmet needs lurking beneath what customers say. You need to be strategic about product decisions and make sure they align with broader business goals. And you must incorporate user research and continuous product discovery into the product prioritization process.

How to turn deep user insights into excellent products

In the previous chapter, we looked at common sources of user insights and how to collect them. Now let's talk about what happens once you've gathered all this information.

Create a scalable culture around gathering insights

Product makers represent a small percentage of employees within an organization, especially in comparison to sales, marketing, customer success, and support—customer-facing teams that are on the frontlines with users each day.

That's why, instead of taking sole responsibility for the heavy lifting, product makers must build a culture around gathering insights. To achieve this, folks across the organization must develop a "product mindset" and understand the specific role they play in the product development process. They must be trained to recognize good feedback and learn to tease out important patterns.

Here's what this looks like in practice:

Sales and marketing teams aren't just selling anymore—now they have an ear to the market. What's happening in the industry? What are competitors doing? What is your product's main differentiator (and what isn't)?

The customer success team is no longer just preventing customers from churning or encouraging them to renew; they are actively trying to understand the gap between customer needs and the product's capabilities, clarifying where the product falls short for the product team.

The support team is no longer being reactive to customer issues. Instead, they are listening for usability pains to share with the product team.

This won't happen overnight, but you *can* teach your customer-facing teams how to ask the right questions and participate in mature conversations around user insights. And, once you build this culture, everyone becomes an extension of the product team.

Get to the bottom of what users really need

Customers are often opinionated about your product and the direction you should take it in. Unfortunately, they're usually wrong.

Why? **When customers ask for a feature, they envision the ideal solution for their own needs.**

Perhaps because we humans assume our own needs represent objective, universal problems, we overestimate others' ability to understand them. Why else would so many customers be willing to take the time to compose a message, but leave out key details surrounding *why* they need the solution they're requesting?

You can't rely on customers to explain their needs to you. You need to sleuth them out yourself.

There are several frameworks to do this. Product thought leader Rich Mironov, for example, frequently uses jobs-to-be-done. This helps him get to the heart of customer needs by reframing their relationship to their problems.

5 Whys is another, and the one we like to use at productboard. Here's how:

To identify customer needs, always ask *why*, then ask why again, sometimes ask a third time, and on occasion once or twice more after that. Uncovering customer needs is a multi-step process, and the trick is asking why in the right way.

Each follow-up question you ask should serve to dig one level deeper towards uncovering the core user need at play. **See the example on the right of a conversation between one of our product managers and a customer.** Notice how he keeps asking for more context and information to dig into the customer's underlying need.

Nothing helps product managers uncover new customer needs quite like a genuine fascination with the problems they're solving for. And that's something that gets built up one question at a time, over months or years of becoming an expert in a given space.

AS
Do you guys have feature voting on your roadmap?
Sent from App, via Chrome, 1 min ago

Hi there, thanks for reaching out! We've heard something similar from some other users. Can you help me understand how you'd expect feature voting to work?
Sent 1 min ago

AS
Well, we really want a community forum where users can submit feature ideas and vote on others' ideas.
Sent from App, via Chrome, 1 min ago

Ok, so it sounds like this is mainly about sourcing new ideas, but also beginning to validate which user-generated ideas resonate the most across all users. Right?
Sent 1 min ago

AS
Yep, that's it. We have 10,000 customers and there are just five PMs on our team so we feel a bit out-numbered. We have no chance of being able to log everyone's ideas one-by-one.
Sent from App, via Chrome, 1 min ago

So you primarily see this as a matter of efficiency? Collecting more ideas faster?
Sent 1 min ago

AS
Yeah, but this also needs to feel like an authentic community. Our goal is to engage our entire user base, help them see how others are using the product, and make them feel like they have a say in the direction the product is heading.
Sent from App, via Chrome, 1 min ago

Makes sense! I think I've got all the context we need for now Mind if we follow up for more input once we begin designing this feature?
Sent 1 min ago

AS
For sure. Always happy to help. 🙂
Sent from App, via Chrome, 1 min ago

Get to the bottom of user needs with these questions and conversation starters

It sounds like <mark>what you want is x,</mark> can you tell me more about that?

Why are you asking for x?
What are you hoping to accomplish with x?
What will x help you do?
Why would x be valuable for your team?

Can we do a Zoom call and screen share <mark>your existing workflows?</mark>

Would you be able to <mark>share an example</mark> of how you're doing [your current process] today?

So it sounds like your [your current process] is <mark>working well for you...</mark>
(a reverse psychology technique)

Conclusion

Neglecting deep user insights can lead to severe consequences. After all, who wants to waste time and resources on products that don't get used, or worse, fail altogether?

We'll be honest. It won't always be easy—as we've tried to show you throughout this guide, it will be a process that involves many small, incremental changes (and maybe a few big, rapid ones).

The good news is that this process doesn't just involve product makers. You'll be getting help from other people and teams throughout your organization. And while it might take time to build a culture where everyone has a "product mindset," the results will be worth it.

Why a product management system is a non-negotiable for modern product teams

These days, every department in the organization has a tool to help them succeed. Sales has Salesforce. Marketing has Marketo. Support has Zendesk and Intercom. And on and on.

Up until now, product managers have been left hanging. Your most critical decisions have taken place in static spreadsheets, stale PowerPoints, disjointed feature request forums, and old-school feature backlogs stored in project management tools. All alongside dozens of systems used to capture user research and feedback (email, note-taking apps, CRMs, support platforms, survey tools, NPS tools, task management tools, Google Docs...the list goes on).
In this environment, it's unrealistic to expect any single person—let alone entire teams—to remember when a particular conversation took place or where they made a note of it.

Given the gravity of the product maker's core responsibilities—to arrive at a deep understanding of user needs, prioritize what to build next, and rally everyone around your roadmap—it's never been clearer that product makers deserve a solution of their own.

"Given the **gravity** of the product maker's core **responsibilities,** it's never been **clearer** that product makers deserve a solution **of their own**"

The old way of managing products is broken

Strategy in chaos

Limited accountability
Black-box decisions
Lack of focus
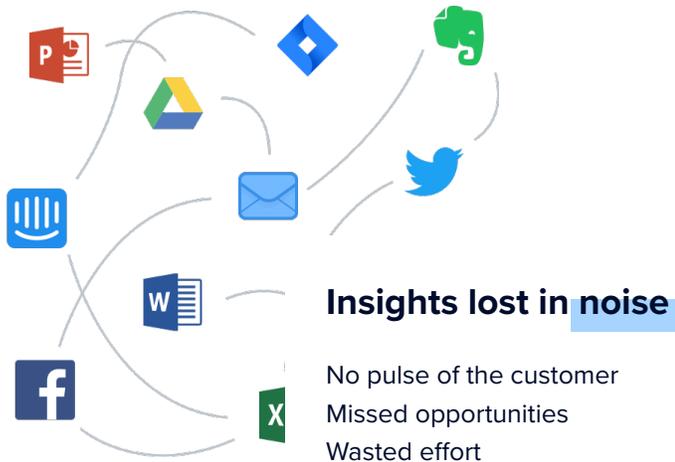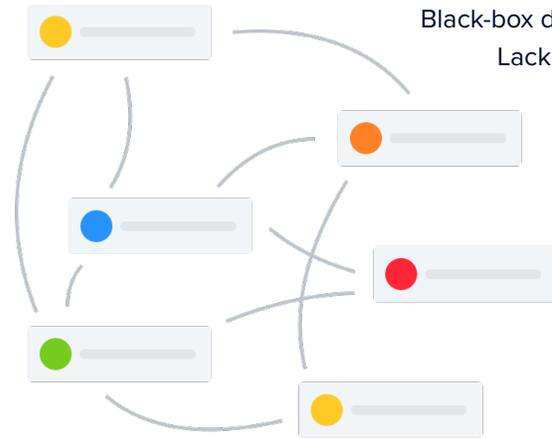
Insights lost in noise

No pulse of the customer
Missed opportunities
Wasted effort

Teams in disconnect

Lack of alignment
No visibility into progress
Broken feedback loop
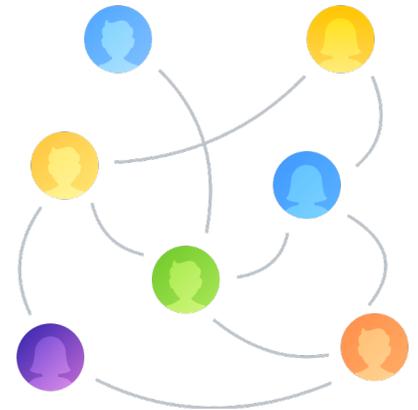
Enter the product management system

Every modern product organization urgently needs a dedicated system for capturing, sorting, and synthesizing information flowing in about product.

If you've already got a product management system in place, high five! You've taken the first step to becoming a customer-focused product organization. If this is a new concept for you, we're happy to show you how productboard can help.

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About productboard

productboard is a customer-driven product management system that empowers teams to get the right products to market, faster. It provides a complete solution for product teams to understand user needs, prioritize what to build next, align everyone on the roadmap, and engage with their customers. productboard is easy to use, enables company-wide collaboration, and integrates into existing workflows.

Learn more at productboard.com