



How to put your  
**customer insights to work**  
for you



# Contents

<b>Introduction</b>	<b>3</b>
<b>Why it's important to do CIR regularly</b>	<b>4</b>
<b>Structuring your CIR approach</b>	<b>5</b>
1. Carry out a needs assessment	5
2. Define your value proposition	5
3. Determine the frequency	6
4. Look at the audience	6
5. Understand the business impact	7
<b>When to work with a professional</b>	<b>7</b>
<b>How MDC Research worked with Qorus</b>	<b>8</b>
1. Findings	9
2. Learnings	12
3. Practical applications	12
<b>Conclusion</b>	<b>13</b>
<b>About MDC Research</b>	<b>14</b>
<b>About Qorus Software</b>	<b>15</b>

# Introduction

Organizations around the world spend a great deal of time, effort and financial resources on communicating with their customers, but not very many place as much emphasis on hearing from their customers – and regularly.

At Qorus, we see enormous value in gathering feedback from our audience and using that to guide our marketing strategy, product development and customer support, among other areas of business.

We do so in the form of Customer Insights Research (CIR), performed by our research partner, MDC Research. CIR uncovers the experiences, sentiments, and loyalty that consumers associate with a brand, allowing organizations to gauge their success through the eyes of their audience; to grow their reach, or to course correct if necessary.

With first-hand insight into the value of CIR, we interviewed Warren Beymer, Senior Partner at MDC Research, to compile this guide. It's designed to help you plan or enhance your own CIR strategy.

With decades of experience working in marketing and customer research, Warren has a wealth of knowledge in the field and is an expert in transforming business questions and needs into actionable research design and results.

If you have any comments, questions, or suggestions or if you'd like to chat to us more about the CIR process, please don't hesitate to get in touch with us at [marketing@qorusdocs.com](mailto:marketing@qorusdocs.com).

Best wishes,



Jennifer Tomlinson  
Executive Vice President of Marketing

# Why it's important to do CIR regularly

CIR enables organizations to take informed actions, to design, develop and market existing and new offerings in the best way possible, and to keep their finger on the pulse of what competitors are doing.

Regularly conducted CIR helps you:

- to look ahead
- determine growing needs
- understand what's happening with competitors
- avoid reactive movements

“By adopting a forward-looking approach, companies can identify gaps or can pivot in response to challenges,” explains Warren. “It gives them the chance to figure out what changes need to be made to their current offerings, what products or services they might need to add, or where other opportunities might exist.”



With that being the case, there is tremendous value in conducting CIR on a regular basis. Even if you are only able to conduct customer research annually, there is value in having ongoing metrics in place. With regular glimpses at your customer and competitor landscape, you'll more likely be able to identify deviations from your most recent CIR results, helping you remain agile and responsive.

An added benefit of CIR is that it has the potential to boost your customers' view of your organization since it indicates your interest in making your customers heard. Acting on the results of your CIR goes further to show that their voice matters to you.

With the value of conducting regular customer research in mind, let's dive into the important aspects that should be considered when planning towards CIR.

# Structuring your CIR approach

There is no one-size-fits-all approach to CIR given the vast array of needs, objectives, audiences, and budget variations that exist among different organizations. But, if you're thinking of doing customer research, the following foundational steps will help set you up for success.

## 1. Carry out a needs assessment

**Consider what your major challenges are, what feedback would be actionable, and what would make a difference for your organization.**

“Are you looking at enhancing a product or do you have information needs? Do you need to understand what is happening in the market?,” asks Warren. “Take this assessment internally too. Do you need to address employee morale or a performance issue?”

Ultimately, you want to define objectives that would be actionable, based on the feedback you receive during your CIR. In other words, you need to outline how you aim to implement the changes that would need to happen once you have the results.

“For example, assess how you might respond and address any problems if employee morale is low or if there is a performance issue and consider strategies to resolve these challenges,” explains Warren.

## 2. Define your value proposition

**Before rolling out CIR, you'll likely need to sell the benefits internally, especially if you need to motivate for budget allocation.**

Prepare by defining a value proposition that clearly points to the reasons for doing customer research and how you plan to execute it appropriately.

“It's important to set out with clear objectives and to ensure that you establish a suitable action plan that will lead to a good customer research design and, ultimately, a return on investment,” says Warren. “Effective customer research hinges on a well-designed method of collecting data, aimed at the right audience. Bad design leads to poor feedback, which then leads to ill-informed decision making.”



Your best intentions could lead your company astray in terms of the results if your CIR doesn't align with your objectives, so it's important to address the requirements upfront.

Also bear in mind that spending a little more (be it financially or time wise) on effective research can save you larger amounts down the line.

### 3. Determine the frequency

**Think about how often it would be feasible to conduct consumer research.**

Each organization's resources and budgets differ, which impacts how often they would be able to conduct CIR. While some might have the means to conduct CIR frequently, others may be limited to conducting this type of research once or twice annually.

There are other requirements to consider too. It's important to assess at what frequency CIR would be meaningful and appropriate in terms of the audience's willingness to engage and their view of it as a positive experience rather than a laborious task. For example, if you engage with your clients weekly, a quarterly CIR exercise may be optimal whereas if you engage with them only twice annually, it may be best to opt for annual CIR engagements.

"These less frequent CIR endeavors are still a good starting point for smaller firms or other organizations with limited resources, or for those who normally engage with their customers on a fairly interspersed basis, but it's vital that these organizations follow up with their audiences. For example, they might want to go back to their research respondents for feedback when developing a new product," says Warren.

In other words, for organizations who conduct research annually, it's important to have an ongoing metric in place – quarterly, for example – to stay on top of any changes that might occur along the way. With this approach organizations remain informed and can address challenges if any arise or can relook their strategy if a new competitor comes onto the scene, for example.

### 4. Look at the audience

**Before designing your research, think about who you need to hear from.**

By relying solely on feedback from within your organization or by aiming research at a small section of your customer base, you might miss big opportunities to understand the broader market for your offering.

"You'll need to assess the different avenues. Does your audience only include



your current customers? Or, do you need to look more broadly to include your potential customers, or perhaps even your competitors' customers?" says Warren. "On the flip side, you may need to be very specific about sub-segments or niches, but this would depend on your objectives."

Once you have identified your audience, think about whether your goal is to reach a level of results which are representative of an audience or merely directional, possibly inclusive of very specific people you value hearing from. Reaching a statistically representative sampling of your audience will impact the volume of feedback you'll need to achieve in your CIR initiative. If it is too small, your CIR finding will not be truly reflective of your audience.

## 5. Understand the business impact

**Research provides the insight to take the guesswork out of decision-making.**

"Reiterating what I mentioned around defining your value proposition, it's necessary to know how to take action once you've received answers from your audience," Warren explains. "How will you work the feedback into a tangible solution or strategy? This is something that a research consultant can guide you on."

With meaningful feedback, customer research enables you to course correct, to improve on internal or external aspects that impact your customers, to guide product development or enhancement, or to improve on your offering. This in turn has the power to positively impact your organization. It's important to outline how you plan to use the results to implement necessary changes, translating your CIR results into far more than information gathering.

## When to work with a professional

Too often, organizations attempt to gain actionable insight from the array of do-it-yourself market research offerings out there. Unfortunately, many of them are designed with leading questions, inappropriate sample sizes, or built-in biases, which may skew the data, lack actionability, or worse, give inaccurate results. This could lead to wasted time and money without getting the meaningful insight needed to build an effective action plan.

Additionally, as mentioned earlier, organizations' needs differ and, given the complex nature of CIR, there is a myriad of research 'types' that exists, which may make it difficult to assess which the most appropriate approach would be.

Professionals like those who make up the MDC Research team have the acumen to guide you through the entire CIR process, from assessing your unique research requirements and recommending the most effective route, all the way through to identifying and reaching the right audience with a well-designed set of questions.

Researchers aim to structure surveys, or the like, so that you hit the most important questions. They pay close attention to designing research in a way that is easy for respondents to consider and to provide feedback.

“Designing a survey with too many open-ended questions will lead to scattered feedback and you’ll lose actionable information. You also need to consider the experience respondents will have while answering your questions. You don’t want people to lose interest on question four out of fifteen because they got frustrated with having to give long answers,” says Warren.

“Then, of course, there are other factors to take into account like gauging the net promoter score (the measure of customer satisfaction and the likelihood that they’ll recommend your brand to others, and that they’ll return), assessing churn risk and other future-related hurdles or opportunities, as well as ensuring that all of these can be determined from an adequate sample size – just to touch on a few points. This goes to show the complexity of customer research.”

Essentially, working with an experienced and skilled researcher drastically improves the likelihood that you’ll find the answers you’re looking for and see a return on investment.

## How MDC Research worked with Qorus

Having performed a needs assessment, MDC Research and our team agreed on the following objectives:

- Start an annual process, at a minimum, of checking in with our customers to find out what they like or don’t like, how they came to find us, what they would improve, and what their thoughts are on product suggestions.
- Discover insights from our customers that will help us identify the best ways to build marketing and sales journeys that speak to real decision makers with real problems and enable us to stand out from competitors.
- Help us to learn more about the tech market in reference to a product like ours.
- Uncover needs, wants, and experiential information from customers that will help us create an educational marketing piece that supports our target audience in better understanding or having the desired information to make decisions based on others’ experiences and successes.

With these objectives in mind, we invited clients across the tech (including the Microsoft Partner Network) and non-tech (legal, telecom, healthcare insurance, and financial and professional services) industries to participate in an online survey, and we collected data over a period of six weeks.

The outcome included a detailed depiction of our clients’ business challenges; how our product is used by our customers and how it addresses their challenges; areas where improvements could be made; and how satisfied our customers are, as well as how likely they are to recommend Qorus to others.

Using this information, we’ve not only been able to respond to our customers’ feedback in an informed way, but we have also been able to create various marketing and sales support resources, which have proven to be valuable assets.

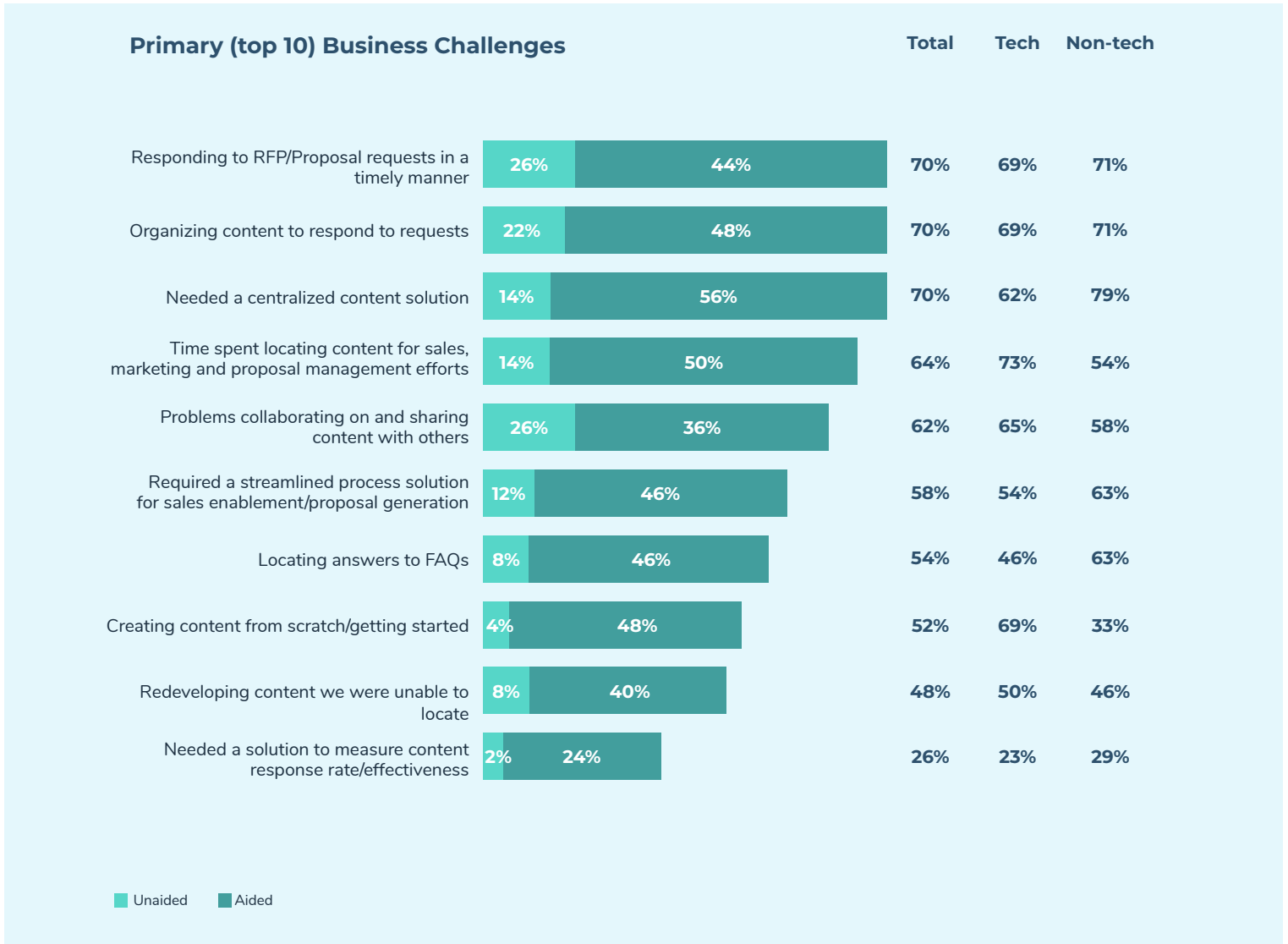




# 1. Findings

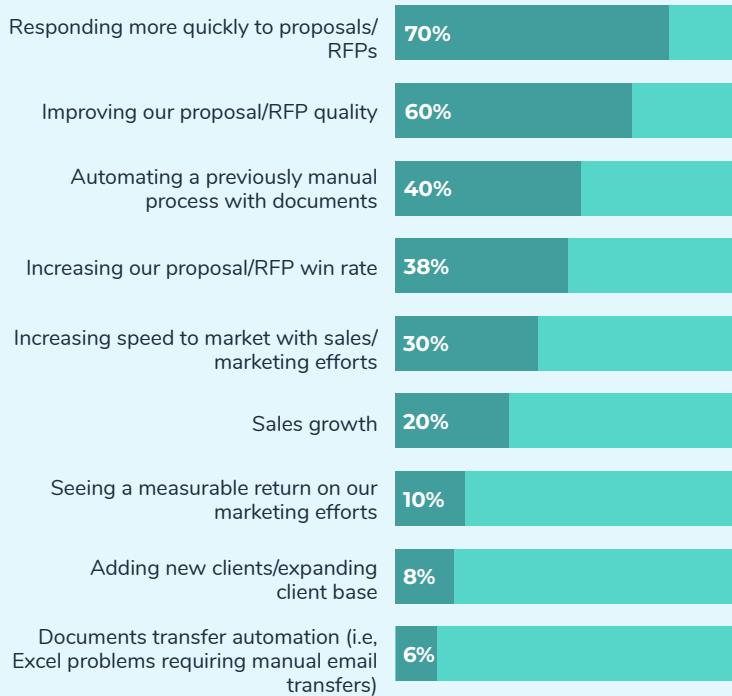
In the below slides, we share some highlights of the detailed results that we obtained through our CIR exercise, managed by MDC Research.

**The main challenges are responding quickly to RFPs and having a centralized solution to organize content.**

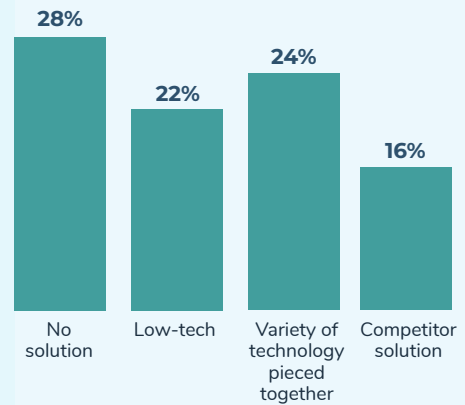


**The main factor leading customers to seek out a solution like Qorus is the need for timely and quality responses to proposal requests.**

**Goals customers are struggling to achieve**



**Technologies used**

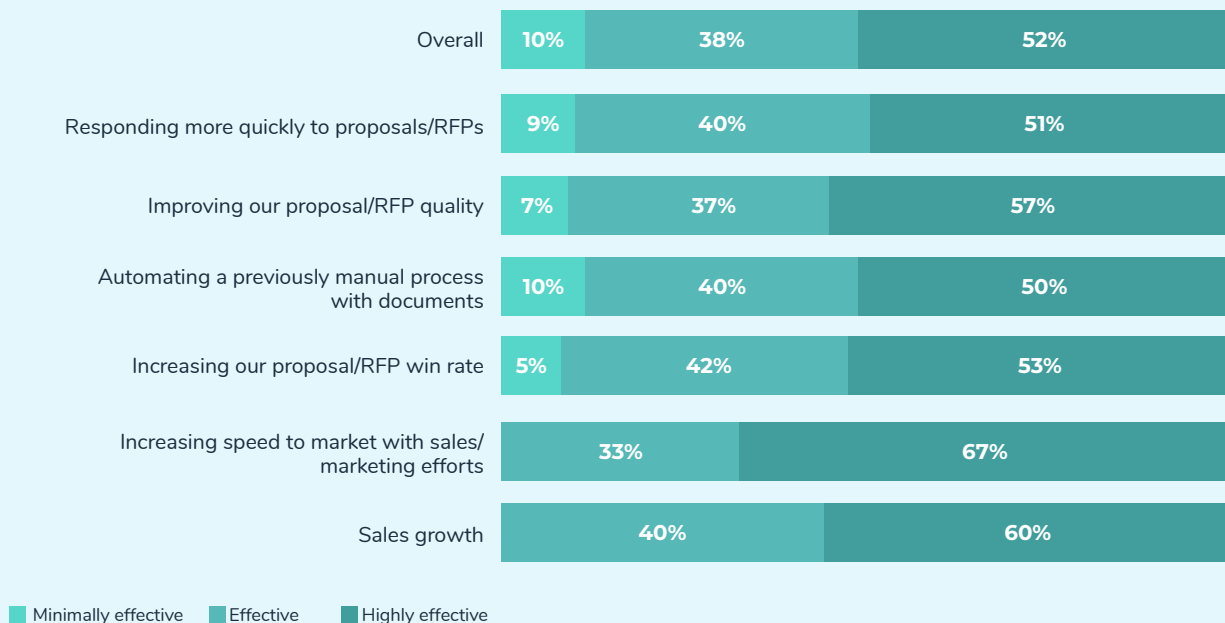


Half had no or low-tech solution for meeting sales, marketing, or proposal response goals.

Only one in six have prior structured solution experience

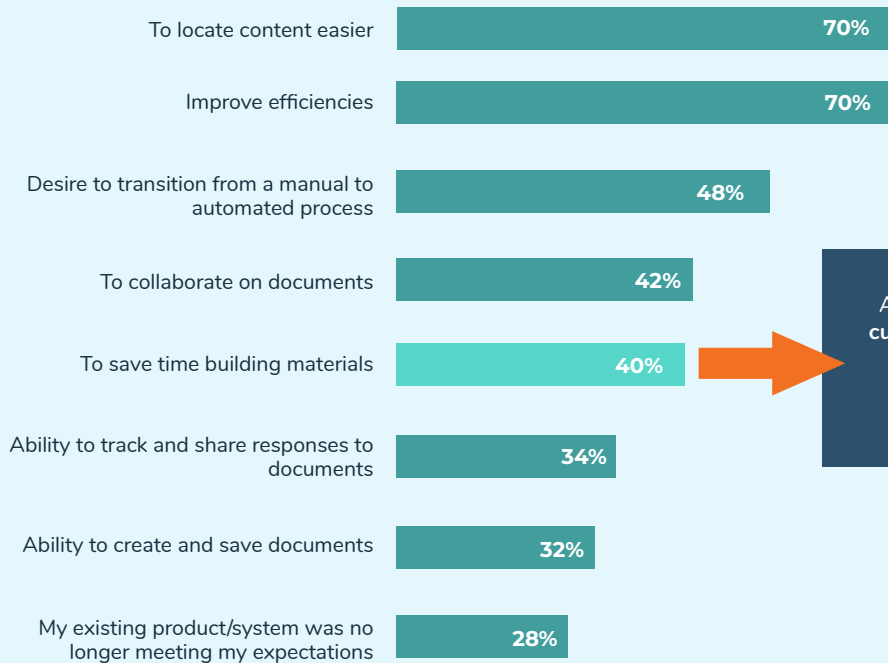
**Nearly all customers found Qorus to be effective in solving their primary business challenge.**

**Qorus' effectiveness in solving problems**



**Seven in ten say locating content and improving efficiencies are the main reasons their companies purchased or began using Qorus Content Hub.**

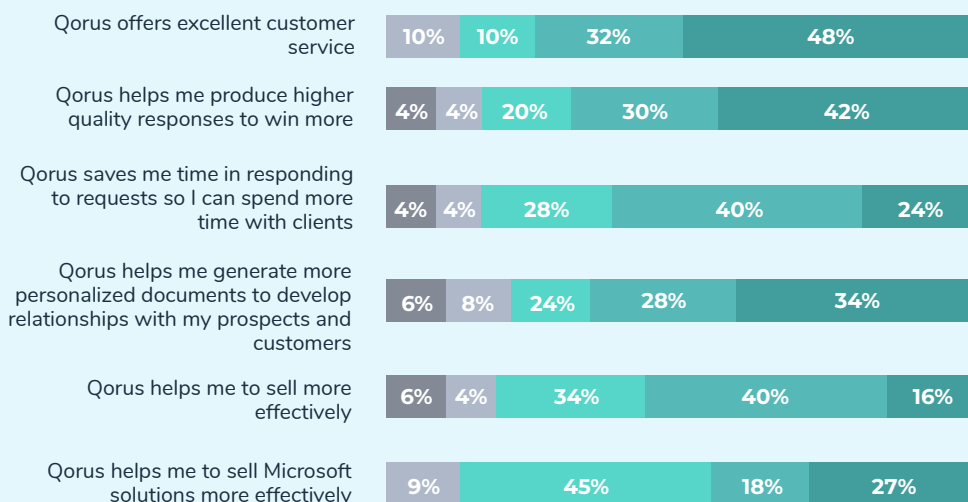
**Reasons to purchase or begin using Qorus Content Hub**



A significantly higher proportion of **non-tech customers (58%)** indicate saving time building materials was a reason their organization purchased or began using Qorus' solution (compared with **23% of tech customers**)

**The majority (80%) agree that Qorus offers excellent customer service.**

**Perceptions of Qorus**



**Suggestions for improvement include\*:** better search (16%), more support/training (14%), better reporting/more visual reporting capabilities (11%), improved speed (8%), additional automation (8%), and integration with other software products (8%).

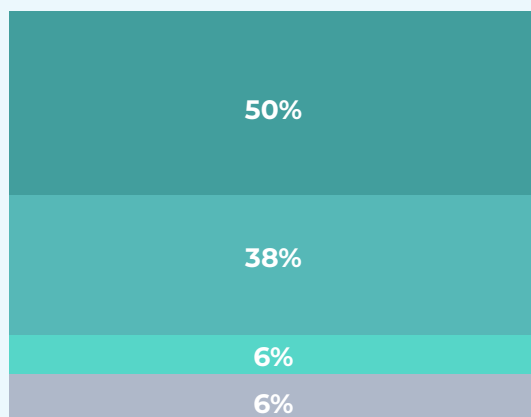
“On the technology side, there really needs to be more formal support/ assistance with SharePoint, as this is the platform on which our repositories are built. If the customer needs an inhouse SharePoint expert, this should be spelled out at the outset. I am not one, but I feel I have to become one now to keep this tool operational. More guidance on best practices for SharePoint and perhaps how-to guides would be appreciated.”  
(Tech Vertical customer)

■ 1 - Strongly disagree   ■ 2   ■ 3   ■ 4   ■ 5 - Strongly agree

\*Open ended question

## The majority (88%) are satisfied with Qorus.

### Satisfaction with Qorus



**88%**  
are satisfied with Qorus

## 2. Learnings

Through our CIR exercise, we uncovered a number of valuable insights and takeaways, including:

- We see immense value in checking in with our customers and aim to do so more often.
- Our customers' feedback provides our product management team with critical insight and informs our roadmap for precise strategic and long-term planning.
- It also helps guide our marketing team in understanding where we could better reach, guide, or educate customers.
- We can better understand where our customers aren't yet using our product and its features optimally and can better support our customers with the information they need to maximize the benefits of using Qorus.
- We are able to see inside customers' pains and are therefore equipped, with clear insight, to solve those deterring experiences.

## 3. Practical applications

The concise information that we gained from this research has sharpened our focus on customers' requirements, the ways our offering has succeeded at meeting these needs, and features that would enhance customers' experience. The research intel better guides our marketing messaging and is also hugely beneficial in helping our salesforce promote products with more insight into what our customers are truly interested in.

Some examples of how we're using the research in tangible form include the following documents, with more in the pipeline:

- 3.1 Impact sheet: Our tech-industry-focused impact sheet serves as a sales tool that showcases the highlights of our customer impact data, supported by client testimonials, to prospects in a visually appealing, digestible format.

View the impact sheet [here](#).

- 3.2 SharePoint guide: In alignment with one of our objectives and in response to feedback received in an open-ended question, we developed an easy-to-follow guide for setting up a classic proposal library in SharePoint with expert insight from our Strategic Customer Success Manager, Glen Pankhurst.

Created for the busy proposal manager, this guide is designed to help learn how to:

- Set up an effective folder structure for easy storage;
- Optimize the searchability of your content (through the magic of metadata!);
- Create a content suggestion feedback loop; and
- Connect your proposal library to your proposal automation platform.

Access the guide [here](#).

- 3.3 How-to videos: Having identified the need to better support our customers in using Qorus to its full capacity, we compiled a series of "how-to" videos which we have shared on YouTube.

Watch the videos [here](#).

## Conclusion

Regularly hearing from your customers enables you to remain agile. The practice of looking ahead through CIR, especially when guided by established professionals, has the potential to clarify your audience insights, shape your strategies, transform your customer engagement, grow your market share, and, ultimately, underpin your organization's ongoing success.

We would like to extend our special thanks to each of our 2020 Qorus Customer Insights survey respondents and to MDC Research who made it possible for us to hear and respond to what our customers had to say.

# About MDC Research

[MDC Research](#) is a full-service, primary marketing research firm that enables organizations to make sound business decisions by providing accurate and timely information for various projects, products, services, or campaigns.

Established over four decades ago, MDC Research is focused on gaining and analyzing quantitative and qualitative research through surveys, focus groups, site visits, and in-depth interviews – an approach the firm calls ‘high-touch research’– and has become an authority in the field of customer research.

MDC Research specializes in the channel and tech space but works across a broad variety of industries, from gaming and social media to utilities, insurance, and financial services.

With national and global reach, MDC Research has established an impressive client portfolio that includes heavyweights like Microsoft, Intel, Xbox, EA, Amazon, Facebook, Liberty Mutual, Twitter, Southwest Gas, and AARP.

MDC Research

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## About Qorus Software

Bring your best minds and content together to create proposals that win. It is essential that your sales team has every tool available to respond to each new sales opportunity and win more business. With Qorus, you'll deliver customized proposals in minutes instead of hours, using pre-approved, and branded content. Gain valuable insights to create smart follow up.

Use Qorus' powerful recommendations engine to locate the perfect attachment in seconds without endlessly browsing through files. Search multiple content sources at once and use our filters to enable your team to find the most up-to-date and relevant components, even as your content library continues to expand.

Easy to use and intuitive, Qorus enables your sales team to quickly craft a targeted, professional, and engaging pitch. Built on Microsoft Azure, you'll create secure proposals up to five times faster, all from within your familiar Microsoft Office environment or CRM system. Over 4,000 Microsoft partners currently use Qorus, including Ingram Micro, Tech Data, SYNEX, SherWeb and Arrow.

With Qorus' built-in measurement tools, you're able to track what prospects are looking at within your content, what they're sharing, and the time spent on each page.

And, 62 percent of Qorus users have reported a spike in productivity, resulting in 20 percent higher sales velocity and a \$20,000 annual productivity savings per user.

Empower your salesforce with Qorus, designed to close more deals faster.

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