

## HBR Case Study

BY GERALD ZALTMAN AND  
LINDSAY ZALTMAN

COMMENTARY BY  
DONNA J. STURGESS,  
ALEX LEE,  
YOSHINORI FUJIKAWA, AND  
LEWIS CARBONE

# The Sure Thing That Flopped

All the market research said that TF's NextStage stores couldn't miss. What went wrong?

**TWENTY-NINE-YEAR-OLD** Drew Mobley, sweating under his summer suit, checked his watch. It was 3:45 on a hot afternoon, and his CEO, Tibal Fisher, was running very late. Drew had been waiting outside the entrance to the mall for more than half an hour, his stomach sinking every time a black Town Car passed. The *Wall Street Journal* reporter was already upstairs in the store, probably resenting the wait. Drew could feel his heart thumping like the jackhammer down the street.

Suddenly a shiny black Lincoln pulled up to the curb where Drew stood. A smiling Tibal opened the back door, sharing the tail end of some joke with the driver, whose shoulder he patted before grabbing his laptop case. As Tibal shut the door, Drew noticed that the tall, tanned 62-year-old was carrying his tie in the other hand. He was struck by how nonchalant and friendly his boss looked, though Tibal was facing the real possibility of a \$40 million fiasco. "Classic happy warrior," Drew thought. "Craves contact. Born for retail, even if it fails."

"Hey, Drew," Tibal said.

"Any word yet?" Drew asked.

Tibal reached into his pocket, pulled out his Treo, and held the device at arm's length. He laughed. "I can't see without my glasses." He showed Drew the screen. Drew told Tibal there



appeared to be no call or message yet from the CFO, who was due to phone any minute with the first hard data on how sales had been at the two dozen TF's NextStage stores since their reopening a month ago. The stores had recently been overhauled after two years of anemic results.

"I've been talking to some mobile companies about making a line of handsets for our stores," said Tibal, "with screens you can actually read." He corrected himself: "That I can actually read. That our customers can actually read."

"Tibal, sorry to rush you," urged Drew, "but we're late. The reporter's waiting."

Tibal took Drew by the elbow, a gesture he never minded. His boss did it to everyone, man or woman, old or – like Drew – less than half his age. Drew opened the door, and cool air greeted them as they entered the mall. A flock of chattering teenage girls floated by on their way to the makeup store; Christina Aguilera's voice wafted through the loudspeakers.

Upstairs, the TF's NextStage store was practically empty. The store manager, a 30-something fellow with thick-framed designer glasses, welcomed them cheerily.

HBR's cases, which are fictional, present common managerial dilemmas and offer concrete solutions from experts.

"The reporter's here," the manager said, waving toward the furniture area. "I told her you were delayed, so I put her in the massage chair over there. She seems OK. No worries."

From the corner of his eye, Drew noticed a couple who looked about the same age as Tibal – but much less conspicuously healthy – moving in their direction.

"Over here," Drew said, pulling Tibal aside. "Don't forget the tie."

Tibal did his best to put on the tie without a mirror. "And don't forget to put your phone on vibrate for the interview," Drew continued.

As the older couple passed by, the woman glanced at him quizzically.

"Anyway," said Drew, "you'll remember Erica Grossman. She did that nice profile of you in 2006." Drew informed Tibal that this time around Grossman would probably be less friendly than she had been when the stores were first opened. The reporter would ask why the stores hadn't been doing well, how the

reimagining of them was going to help. That was why Drew had suggested breaking with convention and holding the interview here, instead of at headquarters. Tibal could be his charming self and show the reporter some of the innovative items, like the computer breakfast table and the EZ-Read watches. And give the reporter the facts.

"Here, you should keep these handy," he said, handing Tibal a few cards on which he had written data points drawn from research the company had done before the overhaul.

"What the media really want to know," Drew said quietly, "is if Tibal Fisher's marketing instincts are finally faltering."

### Catering to Boomers

Tibal Fisher had founded an eponymous, highly successful home-furnishings chain as a young man in his late twenties, catering to the hearts, minds,

and wallets of the generation famous for breaking social rules. Having started out supplying these customers with lava lamps and trendy, colorful, inexpensive apartment furniture, Fisher had always managed to stay one step ahead of them too. They had cheered the firm's ahead-of-the-curve emphasis on ecoproducts and sustainable forestry as they grew

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older. His gently militant worldview was behind the creation of TF's NextStage – sort of a Sharper Image for aging baby boomers.

"If it's a sixties-friendly product, I'll stock it," Tibal had declared when founding the brand extension, intentionally conflating the decade with customers' ages. Though many of his customers were a bit too young to have come of age during the 1960s, a folk-rock atmosphere permeated the TF's NextStage stores. As they moved toward the home-furnishings section, Drew could hear the Byrds' recorded voices from the sound system in the store, singing "Turn! Turn! Turn!"

They found Erica Grossman dressed in a gray pantsuit and sitting in a faux-leather massage recliner, having her calves squeezed and looking distinctly out of her element as she watched a white-bearded man inspect a sleek black stand-up plug-in power strip. The strip was designed so that a user could effortlessly click a power cord into it, without the need to bend over and stuff a plug into a hard-to-reach outlet behind a sofa. The customer was plugging and unplugging a cord to test it out. It looked as though he had been playing with the high-tech wheelie shopping baskets, too. A bright red one – definitely not your grandmother's wheelie – stood beside him.

Catching sight of Tibal and Drew, Grossman turned off the massager and stood up to greet them.

"Nice to see you again, Erica," said Tibal, reaching out to shake Grossman's hand. "Sorry we're late. Thanks for coming."

That was when he noticed the brace on the reporter's right hand. "Carpal tunnel?"

"Yes," Grossman said self-consciously. "A touch. Too much typing."

"Sorry to hear that," said Tibal. "We have some gadgets that might really work for you."

"Let's go over to the café," said Drew brightly. "It's quiet, and we have some things to show you."

"It's pretty quiet anyway," said Grossman. "But sure, let's see what you've got."

Drew looked at the reporter. Was that a swipe? It was true that in this high-traffic mall, the store wasn't getting its fair share of shoppers. Hard to believe that only a few years ago, people like her were practically fawning over Tibal and gushing about the stores. TF's NextStages were opening in the nation's classiest malls, and retail analysts reported the move as both clever and counterintuitive. Many business strategists considered aging baby boomers, despite their enormous numbers, to be a dead market – people in their fifties and sixties weren't big buyers of household items. But the company had found and publicized lots of data that reinforced Tibal's gut feeling that there was a market for clever household items customized for his target segment. Market research showed that boomers believed the world had a responsibility to adjust to their shifting desires and tastes. Other data pointed to the encouraging levels of disposable income

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among boomers, especially once college expenses were behind them and second homes needed to be furnished and filled. And telephone surveys of 200-plus people showed solid evidence of a potential customer base for the TF's NextStage stores.

Drew recalled watching through a two-way mirror as focus group participants responded warmly to the branding message "TF's NextStage - Living for Your Best Stage." The participants loved the concept of stores that sold ordinary household products reworked especially for their generation. They were emphatic about wanting tools that were easier to use. Sometimes there would be a particularly encouraging phrase from a focus group member playing with a gadget like a big, soft-handled carrot peeler, perfect for someone with arthritis. "This is so cool!" the person would say, prompting a joyful grunt in response from Tibal, also watching from behind the mirrored glass. Drew had to tell the chief to be quiet so he wouldn't be heard.

At the opening of the first store, in North Carolina, curious customers flocked in to take a look. It was going to be all about generating traffic, Tibal had predicted. "If we can get people into the stores, the products will sell themselves."

Tibal had stuck to that line even when the stores were clearly failing to take off. Finally he had been forced to invest in the overhaul, which involved brightening up the stores with more lights and lots of mirrors and adding food service. The total tab for the stores and the reimagining was getting close to \$40 million.

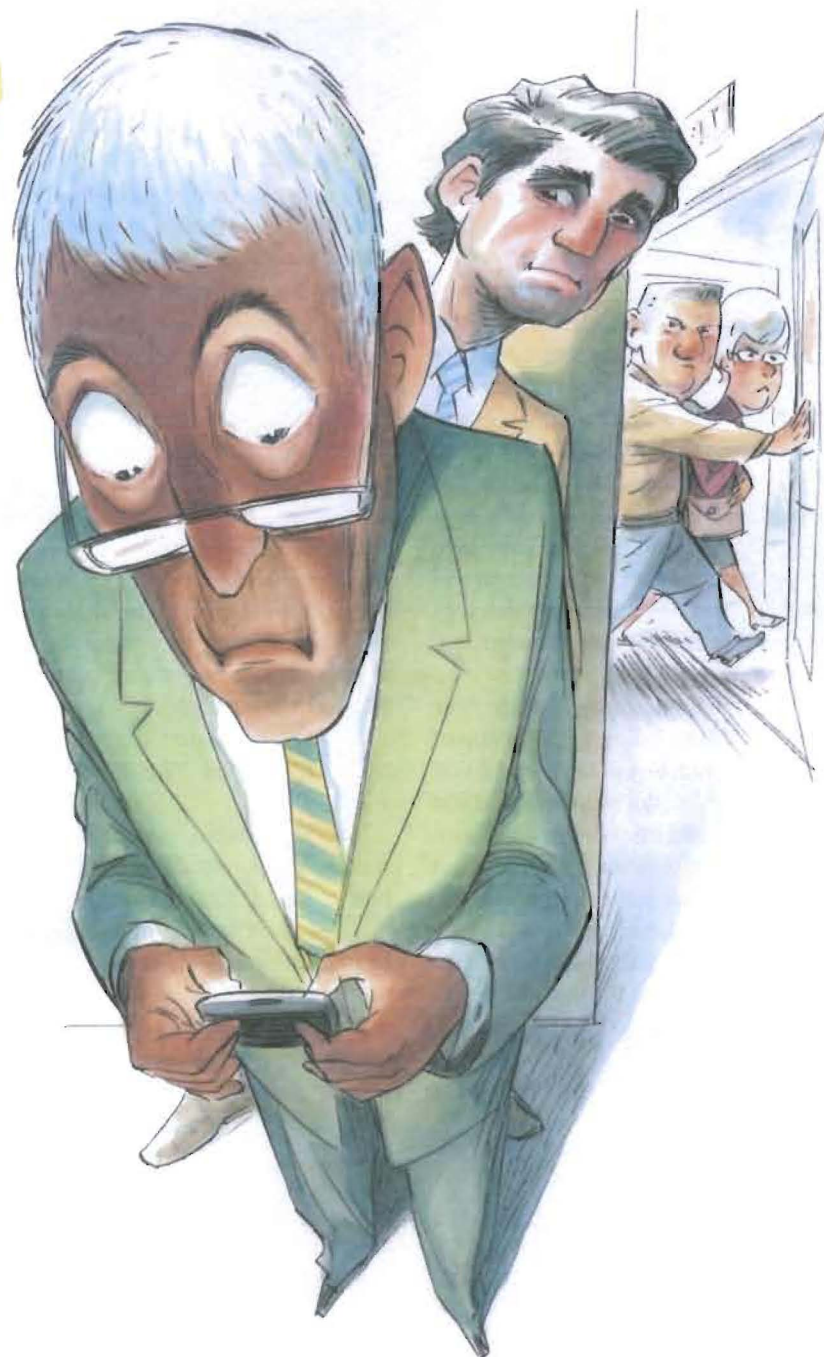
### A Table for One

Tibal led Grossman into the café, a Starbucks-style coffeehouse area filled with comfortable chairs and low tables that formed the centerpiece of the kitchen-furnishings area. "Community is the essence of the reimagining of these stores," he told the reporter. "We want the store to be a gathering place. Food and coffee are integral to making that happen." He pointed toward a young woman be-

hind a small counter filled with pastries, flanked by a short menu of coffee drinks and teas. "Would you like a coffee? Drew, can you bring me a decaf chai?"

While Drew was getting the drinks, Tibal showed the reporter a combination breakfast table/computer desk beyond the café, in an area filled with light-oak cabinets, adjustable stools, and high-end coffeemakers with big buttons for easy

programming. Tibal demonstrated how a tray holding a computer keyboard with a touch pad could be pulled out from beneath the table surface. A flat-screen monitor on a swing arm allowed a user to set the monitor to the right eye level for "sit back" television watching or "sit forward" computer use. "So you can use the table for dining, for surfing the web, or both!" Tibal said happily.



"TF's NextStage is all about understanding and anticipating the needs of our customers," he continued. "And we've studied this segment thoroughly. We know that because of their stage in life, the divorce rate, children moved out, what have you, they are on their own – they often have no one to go out and eat with. But they do want to feel connected. And our society doesn't accommodate them. Our society – every restaurant you can think of – has absolutely no provision to make people feel comfortable eating alone. Think about it – if you go into a restaurant alone, you feel so uncomfortable that it's a miserable experience. They give you a little table over in the corner, and they treat you like a leper. Or else they put you at a counter like a trucker in a truck stop."

"The table is interesting, and the overall notion of appealing to this group of consumers sounds good in theory," said Grossman, "but I'm wondering about your traffic patterns. What kind of data can you show regarding shopping patterns for, say, this mall? Do things generally pick up on Saturdays?"

As he approached them, drinks in hand, Drew listened for the data points he had written out for Tibal. No such luck. He sighed. Such was the PR person's life. Still, he had to hand it to his boss – Tibal was nothing if not enthusiastic.

### Change of Heart

Just then someone tapped Drew on the shoulder. It was an older man, half of the couple who had passed them earlier. Drew thought for a moment the man was going to ask him about a price or where the restroom was, but instead he asked what the interview was all about. Trying to keep his voice down, Drew said it was the company CEO being interviewed by the *Wall Street Journal*. The man looked very impressed.

"So if you wouldn't mind getting back a little bit," Drew added.

Seeming surprised at this request, the man stepped back. "Sorry to bother you. I'll just go find my wife."

He found her in the bedroom section, opening a tall walnut armoire. The top rung was attached to a sturdy pull-down handle, making it easy for her to hang a jacket.

"I really like this," she told him. "Nice idea. What were those people doing over there?"

"He's the CEO of this store. He's doing an interview with the *Wall Street Journal*."

His wife raised an eyebrow. "Oh really? That corporate guy?" She smiled. "Wonder who that younger man was. He looks so nervous." She turned, pointing to a display bearing several wall and shelf clocks. "Did you see this clock? It's really easy to adjust. And look at these!" She showed him her metal shopping basket, containing a dozen soft-handled kitchen utensils and silicone pot holders. "Magical, these gadgets."

"Jenny, can we please go now?" her husband pleaded. "We have enough stuff."

"Why?" she asked, surprised by the upset tone in his voice. "I thought we were here to look at furniture for the condo."

"Oh, I don't know. Since we've been rattling around in this store, I'm starting to feel trapped. Old. Ugly. All these products are for old people. The whole store is for old people. It's like a senior center."

She patted her husband's arm. "Well, we are getting up there, you know."

"But I don't want to be constantly reminded of it," he said. "I mean, listen to the music in here. Look at the young kids behind the counters – this song was 20 years old when they were born! I feel like everything is pointing to my age. Like that CEO is trying to make money off of us because we're getting older."

His wife looked at the clocks and then into her husband's eyes. "I see what you mean. OK. Let's just go get some coffee."

### Bad Vibes

Tibal Fisher suddenly started squirming as though ants were crawling on him. Drew knew what it was – his boss's phone was vibrating. Tibal was getting a

call or a message and was trying to suppress the urge to look at it.

Please, Lord, Drew thought, don't let him look at it – not while he's being interviewed.

Distractedly, Tibal asked if the reporter would excuse him for a moment. He already had the phone in hand by the time he got to where Drew waited. Tibal took his glasses out, attacked the phone's keyboard with his thumbs, and peered at the screen.

"That can't be right," Tibal said to himself. "That bad?" He looked at Drew. "This isn't good," he said. "I've got to get out of here. Can you get me out of here?"

"I think you have to finish the interview," Drew said.

"The numbers," Tibal said. "The re-imagining." The numbers from the CFO must have showed that the rescue attempt was looking like a flop.

The music was grimly appropriate: Bob Dylan this time, singing, "People'd call, say, 'Beware doll, you're bound to fall/ You thought they were all kiddin' you.'"

Drew understood his boss's impulse to flee. He nevertheless told Tibal it was imperative that he finish the interview. Tibal nodded, though he didn't move. His fingers were digging into Drew's arm.

Drew noticed the man he had shooed away earlier, walking out of the store, empty-handed, with his wife. He wondered what they were thinking.

**How can Tibal Fisher Stores improve its customer research process and save the brand extension?** Four commentators offer expert advice beginning on page 34.

**Gerald Zaltman** ([gzaltman@hbs.edu](mailto:gzaltman@hbs.edu)) is the Joseph C. Wilson Professor of Business Administration, Emeritus, at Harvard Business School in Boston. **Lindsay Zaltman** ([lzaltman@olsonzaltman.com](mailto:lzaltman@olsonzaltman.com)) is the managing director of Olson Zaltman Associates in Pittsburgh. They are the authors of *Marketing Metaphoria* (Harvard Business Press, 2008).



**Donna J. Sturgess** (*donna.j.sturgess@gsk.com*) is the global head of innovation for the consumer business of GlaxoSmithKline. She is based in Pittsburgh.

**THE TIBAL** Fisher team's customer research efforts are a classic case of analysts' missing the subconscious associations at work in consumers' minds – something that Gerald Zaltman and Lindsay Zaltman, the authors of this case study, would describe as deep metaphors. Because Tibal Fisher and his top executives overlooked those deep metaphors, they weren't aware of the emotions that could be revealed through them. The team looked only at customers' surface attitudes. Since those attitudes make up a relatively small part of the total consumer response, the executives are clueless about the reason for the anemic sales.

It's critical for companies to understand that every customer relates to a brand on an emotional level, and those emotions trigger – or block – purchases. That's why for a number of years now, GlaxoSmithKline has been intently focused on using emotional strategies in branding and marketing. A great

on a diet. So we took a number of steps to inject positive emotions into the whole process of thinking about and using Alli.

First, we chose a product name that sounds like a helpful partner. We aimed to make the package beautiful and useful – something that wasn't just a carton of pills but also a container for diet guides and recipes. Then there's what we call the Shuttle. It holds three Alli pills so that customers, when they're on the go, can take one at each meal. We wanted it to be much more than a pill case: We designed it so that when you hold it, you feel as though you're holding someone's hand – a partner's hand – because of the way it fits in your palm. In fact, it's designed to be a transitional object, something the dieter can hold on to while letting go of past eating habits. The brand connects in your hand.

In this way, Alli speaks to a couple of deep metaphors in consumers. To use terminology that the case authors have employed on many occasions, it speaks to *transformation*, both the physical and the emotional metamorphosis that a customer goes through during the weight loss process; and *journey*, in the sense that weight loss involves the steps of behavioral change.

It's unlikely that these metaphors or the emotions that go with them would have been uncovered in traditional customer research processes such as focus groups and surveys. At GlaxoSmithKline, we use a wide variety of techniques to examine the relevant customer emotions and learn how to invoke them to create the experience we want the brand to project. Even simple techniques such as one-on-one interviews or ethnographic observation that involves going into people's homes to study customer behavior can provide valuable lenses through which to survey the emotional landscape.

Traditionally, marketing has been about touting products' features and benefits to the rational part of customers' minds. That's still important, but in today's competitive business climate, it's imperative for companies to gain full insight into customers' feelings and translate them into an emotional strategy.

Every customer relates to a brand on an emotional level. Those emotions trigger – or block – purchases.

example is Alli (pronounced "ally"), a product that deals with a highly emotional issue: weight loss.

Alli is an over-the-counter medication that blocks the absorption of 25% of the fat in a meal. Customers use it as part of a weight-loss program that includes a low-fat diet. In marketing Alli, we faced a challenge similar to one that TF's NextStage stores face: The very thought of buying the product reminds customers that they have problems they feel negatively about. In the case of TF's NextStage, the problems are age, isolation, and infirmity. In the case of Alli, the problems are excessive weight and all its consequences. There's always a risk that consumers' negative feelings and the hurdles of weight loss will discourage them from starting or staying

Wendy Wray

**THIS RETAILER** can get its brand extension back on track by remembering a principle that applies to consumers in general and to baby boomers especially: *They're attracted by brands they associate with the type of people they'd like to be – not the type they really are.* Ads by North Face and Patagonia feature climbers and surfers, not the city dwellers who wear the companies' products while pushing strollers and walking dogs.

I was reminded of this principle a few years ago when OXO conducted focus groups to find out how far we could move from our core business, kitchen tools, into other products by applying our design philosophy of making things easier to use. We asked participants to pick photos showing people they perceived to be OXO users and nonusers. Consistently, they picked people who looked fit, successful, and interesting as the sort who would use OXO products, and people who looked conservative, older, and less fit as the sort who wouldn't. Yet the participants, all owners of OXO products, looked a lot more like the latter than the former.

Although the needs of users with deteriorating vision or dexterity are very much taken into consideration when we develop new designs, we try to offer products that appeal to 20- and 30-year-olds. We believe that positioning these products as "helping tools" would serve only to stigmatize the brand. That's why the philosophy of "universal design," which calls for creating products that are comfortably usable by the largest possible range of people, is never explicitly stated as part of OXO's marketing position.

Indeed, labels and words are very important. "TF's NextStage" might be a good name for a toddler's training diaper but not for a store targeting the current generation of 60-plus-year-olds who ride Harleys and use iPods.

It's surprising that Tibal Fisher's extensive customer research didn't set him right. Perhaps he so badly wanted to believe in his vision that he misinterpreted the data. In any case, he lost touch with what customers were thinking. An executive must be open to signals

from customers and the market, and there are many ways to listen for them.

At OXO, we've found that user research doesn't need to be rocket science. What's important is that managers be inquisitive, that they be avid users of the type of products we sell, and that every employee be looking out, constantly, for problems and solutions in both the company's and competitors' products. When OXO employees attend social gatherings outside the office, they often bring up the topic of product pet peeves. We have done simple surveys in the lobby of our building by offering free OXO products in exchange for people's opinions. If Procter & Gamble's researchers saw us doing that, they'd say we were crazy for interviewing unscreened New



*Alex Lee is the president of OXO International, the New York City-based maker of OXO Good Grips household products.*

"TF's NextStage" might be a good name for a training diaper but not for a store targeting boomers.

Yorkers in an unscientific sampling. But we recover great insights – in fact, we find that our small samples often echo the voice of the market.

The most valuable learning happens when we come across latent needs – problems that users aren't able to articulate. For example, when evaluating a concept for a new measuring cup, we noticed that users were repeatedly bending down to read the measurements on the side, adding or subtracting liquid, then bending down again to check the measurement. They never identified this as an inconvenience – they accepted it as a part of the measuring process. The OXO Angled Measuring Cups' interior ramps solve the problem, making measurements visible from above.

Sometimes the most important signals come from an executive's own instincts. In Tibal Fisher's case, his inner voice could have told him what his surveys and focus groups didn't: Boomers won't support a business that expects them to act their age.



**Yoshinori Fujikawa**  
 (yfujikawa@ics.hit-u.ac.jp) is an associate professor of international business strategy and associate dean of external affairs at Hitotsubashi University's Graduate School of International Corporate Strategy in Tokyo.

**THE COMPANY** has a lot more customer research to do. Customers' views about the TF's NextStage stores are anything but consistent. Even within the mind of a given individual, feelings can vary from intensely positive to intensely negative. Customers may not be aware of the contradictions. It's in this kind of situation that traditional research methods, which assume that customers can verbalize their feelings, do a poor job of helping marketers form a coherent picture of customer attitudes. The company needs to dig into consumers' conscious and unconscious minds.

A large pharmaceutical company recently did such digging to understand how consumers felt about two of its pain relievers – one based on acetaminophen, the other on ibuprofen. Traditional research had showed that the two analgesics were poorly differentiated – that consumers saw them as interchangeable. Accordingly, strategists were

school, despite their illnesses. Those kids tended to get ibuprofen.

The company now had the beginnings of a coherent picture: Customers seemed predisposed to believe that acetaminophen is for when you're staying home and taking care of yourself, and ibuprofen is for when you want to go to work or school despite being sick. Hence, consumers' feelings about the products were potential sources of differentiation. The company used that insight to reinforce this distinction in its marketing, creating very different positioning for the products.

It could be argued that, statistically speaking, the company relied on a very small sample to gather this information. Indeed, it's simply not practical to do lengthy interviews with large numbers of people. That's why many companies use research of this type to help them formulate a hypothesis that can then be validated (or shot down) through traditional quantitative research. A similar process could help Tibal Fisher create a coherent vision of what aging boomers really want – and what they don't. The company could then commission large-scale surveys and other forms of research to confirm its hypotheses.

Research methods of this type, which stem from psychology and cognitive science, have another important function: They provide insights into how to create an emotional bond with consumers that can't be easily imitated by competitors. Such a distinction is critical to businesses in today's marketplace, with product commoditization jeopardizing profits.

Some businesses can do all this without deeply researching customers' feelings. Generally, those companies are led by executives with an innate talent for sensing how the customer feels and thinks. Those leaders, in a sense, function as "professional consumers," instinctively channeling customer feelings into the company's marketing and branding. But even a superbly tuned-in marketer can falter in his ability to read consumers' desires and dislikes. In the long term, firms need to build an organizational capability and create a systematic approach to discovering what's going on in customers' minds.

## Traditional research doesn't help marketers form a coherent picture of customer attitudes.

baffled about how to make each product stand out on its own.

In one-on-one research that probed into the deep metaphors used by consumers, heavy users of the two medications were asked to select images that represented their thoughts and feelings about the products. Many chose pictures of mothers. It turned out that people's choices about pain relievers were strongly influenced by what their mothers had given them. By probing more deeply, the company discovered that acetaminophen moms were different from ibuprofen moms. Some of the consumers recalled from childhood that when they awoke with runny noses, headaches, and sore throats, their mothers brought them soothing drinks, told them to stay home, and gave them acetaminophen. Others recalled being told to get up, get dressed, and go to

**FIGURING OUT** where the company's customer research went awry is important, but a bigger question is this: What should Tibal Fisher's management team do with the TF's NextStage stores once it begins to uncover customers' hidden feelings about the stores and their products?

Applying deep knowledge of customers consistently and effectively is a huge challenge, even for companies that are very progressive in their understanding of deep metaphors and their willingness to learn how brands make customers feel. "OK, what do I do with this information?" is one of the most common refrains I hear.

A hospital my firm worked with determined from extensive research that movement was a key metaphor in the emergency department. As long as there was a sense of movement, patients and families unconsciously felt that they were being taken care of. People want to move from not knowing to knowing, from pain to relief; they want to get on with their lives.

Translating that knowledge into action was challenging, however. We worked with the hospital on the implementation, and eventually the solution that emerged involved creating movement of various types in many phases of the patient and family experience. Families no longer sit in a general waiting room until hell freezes over. Instead, they travel through the process along with the patient, going from area to area, getting a sense of movement. The language of the clinical workers changed, from statements like "I've got to take you here now" to "Now we're going to move on to the next thing." The solution even extended to the selection of artwork and the use of moving water. For years there has been evidence that the presence of water has a healing effect. But what is it about water? It's the movement, the liquidity. With that knowledge, it's easier to understand the effect of fountains and other design applications of water.

In the case of TF's NextStage, the first step, of course, is for the company to figure out why customers don't enjoy the way they feel in the stores. The story provides clues that the stores and products make custom-

ers feel old – and not many people like being reminded that they're aging. After years of soliciting people for membership at age 50, AARP has had to work very hard to overcome the impression that getting the friendly AARP notice in the mail was a sure sign that you were over the hill.


For TF's NextStage, implementing knowledge about customer feelings will involve taking action to remove reminders of aging – no easy feat for a store that sells gadgets geared to older people. One thing the company could do is eliminate the clocks that are for sale and some of the mirrors that were installed to make the space seem bigger and airier. There's nothing like a mirror for reminding us how old we are.

Another thing TF's NextStage could do is change or eliminate the café setup. Sitting around a room with other older people is a reminder of the similarity that links you with them: age. A company wants customers to leave feeling better about themselves, not worse. I have no doubt that in focus groups



**Lewis Carbone** ([lcarbone@expeng.com](mailto:lcarbone@expeng.com)) is the founder and chief experience officer of the Minneapolis-based consulting firm Experience Engineering and the author of *Clued In: How to Keep Customers Coming Back Again and Again* (Prentice Hall, 2004).

## Applying deep knowledge of customers consistently and effectively is a huge challenge.

and surveys, potential customers told the company the café was a great idea – a place to connect with people like themselves. Participants probably said things like "I'd feel better in the stores if I knew there were other people in the same situation." But that's not the truth. Customers often are unable to articulate their deepest feelings. That's why companies need to go to the trouble of working with them one-on-one to find out what's driving them toward – or away from – a brand. 

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