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CASE STUDY: EMBEDDING CUSTOMER VOICE INTO STRATEGY

A COMMON CHALLENGE

Across different companies I have worked with, the same issue has come up: product decisions were made without a reliable or structured way to bring in customer input. Feedback was scattered through support tickets, one-off conversations, or occasional surveys, but it was rarely organized into something teams could act on. Without a consistent pipeline, roadmap priorities often missed the mark. The result was frustrated customers, launches that fell short of expectations, and strained relationships with customer-facing teams who needed a way to show users their voices were being heard.

THE APPROACH

There are a number of tools that can be utilized to better understand potential customers, active users, and the patterns that lead to churn, and many of them offer quick, quantitative data that helps make fast decisions. When solving complex, data-heavy problems entrenched in regulatory obstacles for unpredictable personas, sometimes a more qualitative approach is necessary. Addressing the gap between product and customer ensures the product roadmap is aligned to innovation and value, not just band-aids.

To achieve this, I've launched customer feedback programs that create multiple customer voice touch points during the product design and development lifecycle, often starting with a roster of customers who volunteer to participate in regular discovery and product evaluation outreach. This user pool provides a flexible channel for insights like an email survey, concept testing, discovery and exploration discussions that take place to better understand the problem to be solved, and what delivery success looks like. These groups meet two to four times per month depending on need, and often include annual in-person sessions at the customer conference.

Contributions at unique companies solving a similar problem:

- ✓ **At Datacor, we faced the task of combining two very different systems , once unique in function, but had grown into an overlapping product space requiring a cohesive rebuild.** To get a feel for user preferences in our existing products, and to explore new ideas that didn't exist in either product, we ran a hands-on workshop where customers could build out their ideal workflows and information architecture. Using printed modules, assets, actions, and common app elements, participants designed the dashboards and processes that best fit their team sizes and environments. These sessions helped us see not just feature requests, but the deeper logic customers applied when structuring their work and how that fluctuated across different persona groups.
- ✓ **At Plex Systems, the same approach helped address the tension between a legacy product and its new cloud successor, easing customer conversions.** Many users resisted the new system because they preferred the familiar "classic" version. Giving them a structured space to share feedback helped surface what they valued in the old system, and gave product managers clear priorities for improving the new one. Just as importantly, it gave customers an outlet to feel heard, which helped rebuild trust. Later on, this established group had a massive impact on a new product launch that was nearing failure, but with the processes we had already baked into our PDDL, we were able to turn it around and launch the product with great success. Less than one year after this launch, Plex Systems was acquired by Rockwell Automation.
- ✓ **At SafetyChain, this foundation of ongoing discovery set the stage for deeper data-driven practices.** Once the cadence was established, we introduced Pendo to track performance and adoption, turning qualitative insights into measurable product outcomes. I also held workshops on design thinking research methods, teaching product managers how to generate new ideas through conversations rather than simply validating their own expectations. Over time, we built catalogs of customer understanding across every area of the product, so discovery became a shared resource, not an occasional activity.

THE IMPACT

- ✦ 2–4 structured customer research sessions per month, creating a steady cadence of discovery
- ✦ Annual hands-on workshops at customer conferences with 50+ participants shaping workflows, dashboards
- ✦ Improved adoption of new features, with fewer escalations tied to “missed expectations”
- ✦ Stronger alignment between Product and Customer Success, reducing churn risk and enabling expansions.
- ✦ Product managers began tracking success metrics for features in advance, shifting toward measurable, outcome-driven planning, and using these principles to prove value throughout the process
- ✦ Onboarding to Pendo enabled performance tracking, linking customer voice with usage analytics

The consistent thread was that customer voice was no longer treated as an “extra.” It became a normal part of how product and design planned, prioritized, and measured success. This shift had clear results. Roadmap priorities were better aligned with actual customer needs, which improved adoption and reduced churn risk at launch. Customer-facing teams had a reliable way to bring user perspectives into planning, which strengthened relationships and reduced the feeling of disconnect. Product managers gained confidence in their ability to connect solutions to measurable outcomes, and leadership had greater trust that roadmap decisions were backed by evidence.

Key Takeaways

- ✓ **Connecting the dots makes all the difference**
Customer voice is often scattered, and without structure it cannot guide roadmap decisions effectively.
- ✓ **Qualitative and quantitative research matter**
Creating a standing customer feedback group provided a reliable channel for discovery, evaluation, and problem framing.
- ✓ **Understanding the context of customer needs and challenges improves product accuracy**
Hands-on workshops and regular sessions uncovered not only feature requests but also deeper workflow logic and user priorities.
- ✓ **Consistent outreach serves both sides of the screen**
A steady research cadence built trust with customers, gave Customer Success a way to make users feel heard, and helped Product Managers plan with evidence instead of assumptions.
- ✓ **Customers connect us all**
Embedding this practice across companies set the stage for outcome-driven planning, performance tracking with tools like Pendo, and stronger alignment between teams.