

## Clients Are Speaking, Are You Listening? How Client Research Can Give You a Competitive Edge with Susan Baier

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Susan Quinn: Today's episode is for anyone interested in gaining better insights on what your clients and employees are actually thinking. Susan Baier is the Founder and CEO of Audience Audit, and she knows how to ask just the right questions and how to turn that information into valuable resources for your firm. I think you're gonna enjoy this. Susan, welcome to the podcast today. I cannot wait to dig into your brain and all of the research that I know comes out of that brain.

Susan Baier: [Laughter] It's good to be here.

Susan Quinn: Susan, tell us about the type of research that you do.

Susan Baier: Sure, so I've been a marketing strategist for a shockingly long time—it's like over 40 years now—and 15 years ago I started Audience Audit, and we are a research agency. So, we provide quantitative research, custom research, to agency leaders, consultants, speakers, authors, thought leaders, to help them understand an audience better, and in a kind of a unique way, which I know we'll be talking about.

Susan Quinn: Well, just to frame this for our listeners, we have engaged the services of your firm, and thought leadership is a way that you can stand out in the marketplace. And let's face it, we have a lot of professional service firms that are listeners for this podcast, and we're all basically doing very similar things. So how do you stand out from the crowd? Well, if we say that thought leadership is one way to show that you are a subject matter expert, how do you actually produce cornerstone content around that, and then how do you slice and dice it?

Susan Baier: The idea of research is so broad; there's so many approaches, and they're built for different kinds of things. Our research is built for marketers and for thought leadership, and the reason it's a little different is that all those years working in agencies and working in big organizations, I got tired sort of sitting around the table every week going okay, what do we think they want? What do we think we should say, and not knowing, right? And so, this research is built to know. Now, a lot of us are doing persona development or research that's showing us what an audience looks like on paper: how old they are, what their income is, or how big their firm is, or their title or their role, but that doesn't give us what we really need, which is, how do they think? How are they approaching the decisions and challenges that they have? And that's where the attitudinal approach that we use comes into play, because I want to know not just who somebody is and what they're doing, I want to know why they're doing it. Because that's when I can really get an understanding of them that will help me serve them more effectively, that will help me be

relevant to them in my conversations, that'll help me provide resources and advice, that will help them with the things that they are struggling with, and basically will help me get a perspective of an audience that doesn't assume everybody's exactly the same. And, you talk about leadership all the time, and this is true for leadership as well as thought leadership. Leaders need to understand the people that they are trying to serve, the people that they lead, so that they can know how best to help them and how best to support them. Can I take a moment to tell you a story.

Susan Quinn: Yes, I love stories.

Susan Baier: So, quite a while ago now I was working for a very large fortune 500 firm at a relatively senior level, and I'd been there for, I think four or five years before I had gone on maternity leave to have my second child, and while I was out on leave, I decided that what I really need to do was work part time. So, I reached out to my manager, and the reaction I got back was, yeah, we don't do that here. Nobody at the director level in this company globally works part time. And I said, okay, well, I'm gonna have to quit, then. And they said, well, hold on just a minute, and then they wanted me to meet with the Vice President. Now I had the same Vice President for many years, worked in the department as a director. They brought me into see him, and he sat on the edge of his desk, and he said, we're worried about you, because don't you want to be a vice president here someday? And I will tell you, Susan, I couldn't help it, I laughed, because no, I did not want to be [laughter], that was not a goal of mine, to be a Vice president there someday. And I wasn't only surprised that he asked, I was surprised at how astonished he was that anyone would not want that. And that was a function of just not understanding me, and what drove me, and why I liked my work there, and what my goals were. And I think, as leaders, if we don't understand that, we risk making really poor decisions with regard to the people that we're trying to lead. If we think everybody wants the same things we do, we're gonna be in trouble, and this is true for thought leadership, too. If we wanna really resonate and be helpful to an audience, we have to understand that audience in a way that goes beyond what kind of car do you drive and how much money do you make, or treats everyone as if they're the same, and worse, the same as us, with the same goals and challenges and perspectives and attitudes and assumptions. It just doesn't work very well. So, the research we built is designed to get into that, whether you are trying to understand your clients and prospects, or you're trying to understand your thought leadership audience that you're spending quite frankly a lot of time and effort and opportunity cost at a minimum to serve. We want to help you do it better.

Susan Quinn: First of all, I love this story. We can't decide for everyone else what it should be. And we have to know how people are thinking, and what's important to them, what is relevant to them, what will be helpful to them. And then you create your content, your thought leadership around that. But let's take our listeners through examples of types of research, from an attitudinal standpoint. Think the financial industry, think engineers, think construction, think CPAs. How does it come back in actual research, and how can they use it to slice and dice it for their own marketing efforts?

Susan Baier: Sure, so the answer, regardless of what kind of organization you're in, the audience you serve, your industry, how big you are, the answer to how can we understand our audience, and their perspectives, and their needs better is a one-word answer for everybody, and it's ask. You have to ask, right? Now, there's lots of ways to ask. You can send out a satisfaction survey after someone engages with you and allow your respondent to tell you a little bit about their experience and how they felt about that and ask them what's most important to them, what are

their big goals? You can ask people if they'd be willing to have a conversation with you, and you can get on the phone and have a one-to-one call with them. You could do a focus group of your customers or prospects. You can put an assessment on your website that lets people tell you a little bit about what they're struggling with or their challenges, and why they are looking for someone like you. There's a myriad of ways to ask, you just have to find one. And it doesn't have to be a huge research project, it can be as simple as a follow up email, or a little survey that you send out as a satisfaction measure. That's a great start, cause you could learn a lot from every individual person. Now, if you want to understand an audience and know that what you're learning about it is statistically reliable, meaning it's not just based on two or three people around a conference table, it's pretty much what the landscape that's going to be there no matter how many times you dip your spoon into that bowl of soup, it's going to come out comparably, then you need statistically reliable research, and that's the kind that we do. For our clients, it's important from their perspective to really understand very specifically how people feel about what they care about, which doesn't always show up in sort of predetermined buckets. You have to do some digging, and you have to structure questions to understand how they feel about your industry and the decision to hire you, or how they feel about writing a book, or whatever your topic is about.

Susan Quinn: Susan, I love where you're going with that, and I want to reinforce one thing: to ask the question is powerful. Because if you are making an assumption, then we all know what it means to assume.

Susan Baier: And we all do it, we can't help it. It's not, you know, don't beat yourself up for having assumptions. It's how we manage to make our way through the world, but they're not always right.

Susan Quinn: They're not always right, so can you give us some examples of research that you have done that's done major aha's for fill-in-the-blank. As much as you can tell, cause I'm sure a lot of it's proprietary.

Susan Baier: Yeah, for sure. Well, let's talk about yours.

Susan Quinn: [Laughs]

Susan Baier: [Laughter] So, when we did your research, we found three groups, and I think you and I could have probably predicted that there would be a group of people who really felt like their organization was already best in class and operating at the highest level, that there were people who didn't feel like their organization was at that level, but very much wanted to be at that level, and a very specific expectations about what could make them best in class. So those two maybe, weren't terribly surprising. But what I found surprising was that there was a whole group in the middle, almost a third of them, who think that best in class, I say in quotes, is really about keeping things simple, focused on proven processes, focusing on one important thing at a time, and think for the most part this term best in class doesn't mean anything, that it's something that's bandied about, and is relatively useless in evaluating the strength of an organization. That was surprising to me. I don't know if that was as surprising to you, but there's a third of the audience that you are serving with your thought leadership that really doesn't respond well to that term or think it stands for anything. So, that's a great example of understanding how we can't look at an audience monolithically, because if you are out there just saying we all need to be best in class, best in class is the best terminology, that particular group—which is a third of your audience—is going to dismiss you right away, because they think

it's bunk. Frequently in our research we'll find things that the client and maybe even us, would assume would be true. For example, that smaller organizations have more challenges or different challenges than bigger organizations, or want different things than big organizations, or see themselves differently than big organizations. And over again, I could tell you in probably 90% of our studies, those kinds of things aren't what differentiates people. It's how they think about hiring companies, or solving their particular problem, or dealing with their clients or whatever. And it's not about how big they are. It's not about their industry. It's not about their revenue. It's not about whether they have an in-house marketing team or not. So, a lot of the time, we build our research really to understand how people think about a thought leaders' area of expertise and their point of view. So that you have some insights that you could talk about. But we're also testing assumptions that the audience may have about us, that we may have about them, because that stuff is really important.

Susan Quinn: I wanna go back to a couple of things. The research that we did just to clarify that, we made assumptions that there are nine traits that the highest performing companies globally share in common, and they really are the best in class. What we said is these three are the most important. You have to have a solid brand. You have to take care of your employees. You do those well, it's the flywheel to deliver the client experience. No kidding, the Jim Collins *Good to Great*, that part isn't new.

Susan Baier: Yup.

Susan Quinn: But the new part that we uncovered was around who values what, and who's growing faster. And so, it's not that the nine were unique, it's the ones who are growing faster are doing all of them, and they're doing all of them well with the caveat of an experience that is memorable. And so, if we don't ask, if we don't understand, especially in today's marketplace, we can make some pretty incorrect assumptions. If you continue to stay curious, keeping the pulse on things, creating your own original research, and so, that's an example of what we did, but if you can, because I think just about everyone is either in an industry trying to be the best that they can be, have you done any research that can help all of us be better at marketing?

Susan Baier: Oh, yes, there's so many mistakes. So, I've been doing an annual study with Drew McClellan from the Agency Management Institute for, this will be our eleventh year, where we're exploring how marketing agency clients think about their situation, their agency, their employees, their clients and prospects, and their agencies. And we've learned a lot about what really matters. And it's true, I think, for anyone who is in a position of an advisory nature one of the things that continues to surf across the surface of all of these surveys is that our clients and our prospects and our employees want us to understand them and operate from a position of understanding. They want to be able to bring more right fit clients into their business and charge what they're worth. That's really the ultimate goal for them, and we are one piece of that. But if all we give them is the research, then they get stuck on, well, what do we do with it. We're not research experts. How do we turn this into content? How do we get people to see it? How do we do all of that? Well, that's a problem. So, we have a question around here that drives everything we do in my agency, and it is, how else can we help? Because it's one thing to just deliver on what you're expected to do, the real value comes in being in a position to understand your clients' larger goals that hiring you is a part of trying to solve, achieve, so that you can literally think where is my client struggling to achieve this? And is there anything we can do as part of what we offer to help? And if not, is there anyone we know that could provide that support, which is where this work of community, this work of truly understanding and trying to help our clients comes into

play, because just because your clients need something to achieve their goals doesn't mean you should do it. We're all specialists in some way or another, and I don't know about you, but when I try to do things that I'm not an expert at, it doesn't always turn out very well [laughter].

Susan Quinn: [Laughs].

Susan Baier: So, I think, having, understanding the bigger goals of your clients and having a community around you that can help your clients solve those goals along with you, or independently of you, or in place of you, is a powerful service to your clients.

Susan Quinn: I'm curious, when you think about firms that are not doing any research, I mean, are they the ones that are headed out? Are they the satisfied in our research that came up that they thought they had it. I always use it as the Kodak moment, where they were sure they were at the top of their game. They chose not to bring in others, to look at what's new, to research new ways, and we all know how the Kodak story ended up. I mean, do you think that's what will happen if you get too satisfied, and you don't stay curious, and you're not keeping a pulse?

Susan Baier: I think it's true for most of us. I mean, I think there are examples, Steve Jobs famously said we don't do any research here at Apple, and you could certainly argue that Apple's been successful. But I think for most of us, checking in and having guideposts to ensure that we are delivering on the promise we're making to the audiences that we want to serve is a good practice, because, to your point, you can get off track. And I think that there are outstanding leaders, outstanding leaders, with a tremendous amount of experience, who, sometimes because of that, fail to see how limited their view is of things. Because we sort of start to feel like, you know, you've been doing this for decades, I've been doing this for decades, we absolutely know everything. So, I think sometimes we get in our own heads until somebody shows us that there's something we're missing, and that's where research can come in and be really effective is sort of straightening us out a little bit.

Susan Quinn: As we are wrapping up our time together, I think that is a wonderful way to summarize the power of research. It is, what are we missing? And if you can then humbly take that back and say, okay, now what? That will further the bettering your best. That will continue to drive exactly what you're looking for, whatever your goals are, and certainly you've gotta make sure that you're getting the right people in to do the work. But, you know, clients have choices today, and you and I have talked about this before. We mess up three times, they don't even tell you why they're leaving,

Susan Baier: Right.

Susan Quinn: You know, today it's perfectly fine to ghost you. So, keeping the pulse, and sometimes it's small, medium and large, and I think we're the same on this, do all of it, understand the frequency of it. When do you need to go big on it? And sometimes just the one on ones, asking the questions can also be a pulse for the customer, for knowing what to do next. Anything to add that you think is most important?

Susan Baier: I think you've done a great job. I think that whether we're talking leadership, thought leadership, whether we're talking about individuals or organizations, if you want a good reputation, if you want people to trust you, you have to show them that you are continually trying to do better. You can't be stagnant. You can't say that the things we knew in 1976 still

apply. You've got to keep understanding an audience because they evolve. Our employees evolve, our clients and prospects evolve, the people trying to learn from us evolve as an audience. So, you just have to keep being open. I tell clients all the time, prospects, if you don't wanna know something that doesn't align with your world view, don't bother doing the research because you're gonna waste your money. It's like a box of chocolates, you don't know what you're gonna get, and if you do know what you're gonna get, you're not doing research right. My job is actually to try to help prove people wrong, because if I can't, then they're really right. So, keep an open mind, keep exploring, ask in every way that you can. Sometimes you need to get some outside help, because sometimes people will tell you what they really think, but they will tell somebody else if they know that their name and answer is not going to get back to you. So, lots of approaches to doing this, but I agree with you completely that for ongoing improvement, for continuing to do a better job, and for building reputation as a thought leader, you need to know what's going on, and you need to know it more than every 15 years or so.

Susan Quinn: Alright. Now I'm gonna put you on the hot seat.

Susan Baier: [Laughter] Okay.

Susan Quinn: What do you do personally to sharpen the pencil in terms of your craft? And being on the other side of that, you know, is anyone doing research for you, or how are you keeping your pulse?

Susan Baier: So, it's such a great question. I am in an extraordinarily privileged position with respect to this, because most of our clients are agency leaders, business leaders, authors, speakers, and we have the luxury of doing our own research into those kinds of folks, and we have clients who are also serving those folks who are doing their research with us. So, A, we get a ton of really solid intel on our prospects and our clients and the people that we want to serve with our thought leadership all the time. That's number one. But I will tell you, equally as important, is that we have a community of these people that we are close to and are allowed to commune with at conferences, at workshops, online. We follow great experts and thought leaders around the kind of support that we want to be providing. And the people we want to serve. And those are those other voices that you talk about when you think you know everything, follow the feed of some amazing folks and learn what you didn't think about, or didn't know, or didn't realize. So, the combination for us of those two things is critically important. We absorb a lot of research. We consume a lot of research, ours and other people's, about the people we want to serve, and then we commune with them. We collaborate with them. We have some questions. We listen and learn from them and with them, and that's been extraordinarily powerful in our ability to serve the people that we want to serve as best we can every day.

Susan Quinn: That's so well said. Just to summarize it in my own words, find ways to be helpful, and then I love the word you're using. Build a community. We all want those relationships, we're all trying to find where we can capture the best information. I'm kind of now taking a left hand turn as we were wrapping up, but I think I saw the latest information that we consume on a daily basis, it's like 74 GB of information in a day, which is equivalent to watching 16 movies in a day, whether it's through TV, computer, cell, tablets, you know, all of the ways we consume. And yet it's going to increase 5% each year. My point is we have more information than we know what to do with, and so I think we are self-selecting and filtering, which then gives me this platform to say, find the community that is being helpful, that understands you, that is helping you better your best, and we'll all keep growing and standing out.

Susan Baier: It's so true, and I will share a link to, my friend Pamela Slim has a book called *The Widest Net*, which is specifically about building community around your business and for your business, that has lots of great advice in there, and it's advice I've followed. It's been really helpful to me, so even if you don't feel like you have community around your business now and around your professional goals now, you can absolutely find and build that. It's possible for all of us, and it's really remarkable when you do.

Susan Quinn: I love it, and I am grateful for your time. Thank you for your wisdom, your expertise, and I look forward to the next round of research that we'll do together.

Susan Baier: I love this conversation, and I learn from you every day, Susan, so keep up the good work.

Susan Quinn: Take care!

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