By [Tom Satwicz, Ph.D.](#)

If you're responsible for creating, shipping, and managing products, I can guarantee at least one thing on your mind: customer feedback. We have access to more customer feedback than ever, and businesses are facing data silos because of it.

For any given product, you might have five research studies happening on different timelines, measuring various product features, and all coming in with different formats and levels of reporting.

Each set of research insights makes sense on its own, but when you try to combine everything, it becomes overwhelming. Then you add all the business metrics — like the cost of sales and revenue — and things really start to pile up.
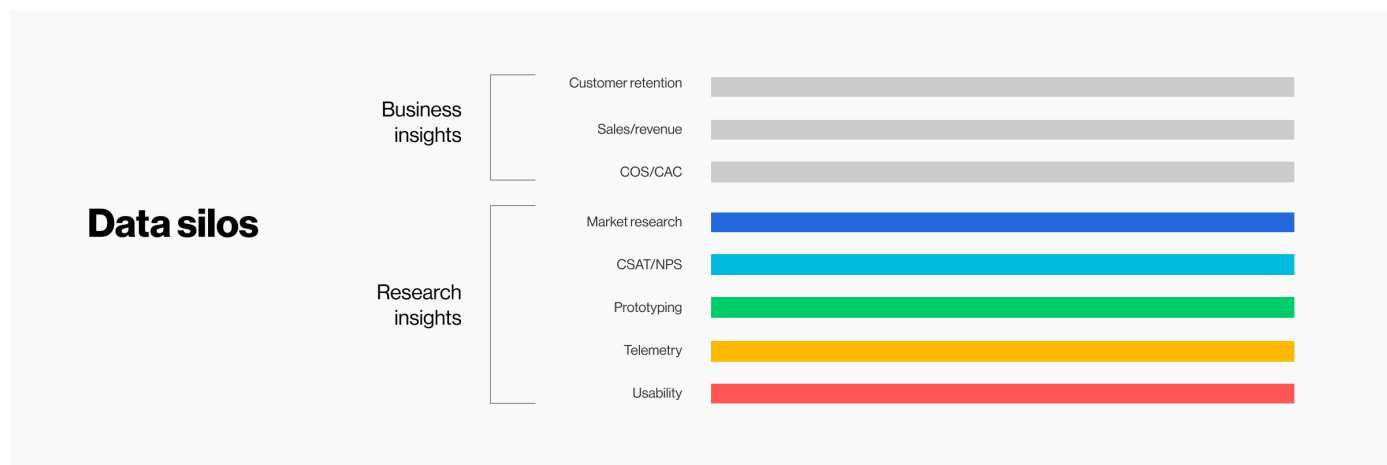
According to Forrester's recent [2023 Digital CX and Design Trends report](#), this problem isn't unique. Designers, engineers, and product managers "struggle to synthesize diverse sources of data."

Creating Customer Success Outcomes (CSOs) can help your company break down these silos and act on the insights that emerge from that research.

What's a CSO?

A Customer Success Outcome (also commonly referred to as jobs to be done or [customer experience outcomes at Amazon](#)) is a statement made up of two parts:

1. What the product does to address a need
2. How the customer judges success

When mapped to a customer journey and paired with evaluative research, CSOs can help you make sense of diverse data sets.

For example, say we're designing a new app called FamilyTrip that helps parents discover, plan, and book family vacations. One CSO we might create for this product is: Parents want to "find enriching stops along the way with ease."

1. What the product does to address a need = "Finding enriching stops along the way"
2. How the customer judges success = "with ease"

And remember, no CSO is the sum of the product and may not be relevant to everyone in your target audience. Instead, each outcome you create will focus on one aspect of the whole experience.

How do CSOs break down data silos?

CSOs can help you connect the dots between different research silos. For example, one way to look at lines of customer research and their respective silos is by the level of insight we can draw from them.

Insights from market research, CSAT, and NPS scores are the "relationship level." These studies give us a 10,000 ft. view of the overall relationship between you and your customers.

Another portion of the research companies typically use is what we refer to as the "interaction level." This level includes concept and usability testing and evaluates specific product workflows, features, and touchpoints.

Making sense of "relationship level" and "interaction level" insights is where the challenge comes in. For example, **knowing which feature improvements will drive engagement, satisfaction, retention, and growth is difficult if your research silos are not set up to achieve similar goals.**

Often, the missing link between these levels is a deep understanding of the customer and the overall journey, including the customer's goals and requirements for whether or not they achieved those goals.

CSOs tie these different levels of research together by giving you a standard set of outcomes to track across engagement points, levels, and time.

Your team can develop CSOs at any time; however, the best time to create CSOs is when you're engaged in deep foundation research. Creating them without reliable qualitative data can lead to poorly defined CSOs.

Three steps to building and using CSOs

You have data silos; you want to use CSOs to eliminate those silos; here are three steps to creating CSOs and adding them to your product roadmap.
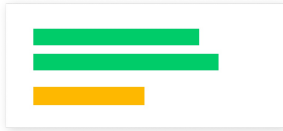
Step 1: Define your Customer Success Outcomes

Start by defining your CSOs. They can be part of the insights derived from foundational research.

As a reminder, each CSO you create should include a job and a success measure.

Customer Success Outcome (CSO) = What the product does to address a need | How the customer judges success

"What the product does" or the "job" can be thought of in a few ways:

- Jobs to be done
- UX goals
- Desired outcome statements

Each CSO should include a single verb and some form of directionality — words like "less," "more," "faster," "easier," "maximize," or "minimize." Here are some other CSOs we might create for FamilyTrip as an example:

- View your daily planned itinerary quickly
- Choose food stops that accommodate dietary restrictions with more confidence
- Share trip highlights with family and friends easily

Need to conduct foundational research to develop your CSOs? Contact our team!

Tips and tricks for defining your Customer Service Outcomes:

- **Revisit existing research:** Your foundational research should give you insights into understanding the bigger picture of what customers want to achieve when they use certain services or physical/digital products.
- **Conduct deep qualitative research:** A researcher should conduct qualitative interviews to understand your users' needs and pain points. Engaging the whole team in this process helps democratize the research and strengthen the overall outcome.
- **Aim for 30-40 CSOs:** Schedule an internal workshop with the co-researchers to review qualitative insights and generate your outcome statements. This should not be done alone!
- **Map your CSOs to a journey**: It's essential to think about how you'll map your outcome statements to a journey map. This will help you leverage them to target specific aspects of the experience.

Step 2: Integrate CSOs into your evaluative research

Once your CSOs are mapped to a journey, you'll want to leverage them as part of an evaluative research program like usability testing and concept evaluation.

By adding your CSO assessment to evaluative research, you will get a view of how you're doing on the metrics customers have defined as the reasons they're using your product (aka the CSOs).

Your CSO work doesn't end here. This is something you're going to want to refer to again and again to continue improving your product and measuring success.

Step 3: Build CSOs into your measurement program

CSOs should be used as a part of ongoing measurement. One way to do this is by creating a recurring customer survey. Here's an example of what that could look like for FamilyTrip.

Find enriching stops along the way

How important is this to planning your vacation?
- 1 - Not at all
- 2
- 3
- 4
- 5 - Completely

How satisfied are you with your ability to do this with the solutions you currently have?
- 1 - Not at all
- 2
- 3
- 4
- 5 - Completely

Once you have your survey insights, it's time to figure out what problems you'll tackle first. Strategies for prioritizing CSOs include:

- Segmenting by persona
- Using satisfaction and value metrics to organize into opportunity types
- Correlating with engagement or other usage metrics

Finally, the CSOs can be integrated with telemetry and ongoing surveys and built into live dashboards. This gives everyone across the organization a holistic view and an opportunity to see how their specific focus area may impact product development.

Start using CSOs

Incorporating CSOs into your strategy can transform your product in significant ways. Prime Video has seen a lot of success over the last several years. Undoubtedly, there are a lot of factors for this success, but alignment around common metrics is a big part of it.

To get started, conduct foundational research to build a deep understanding of your customers, and define your CSOs. Next, evaluate your CSOs early and often by incorporating them into all research phases, from early concepts through to usability and "readiness" testing. Finally, measure your CX over time by embedding CSOs into your measurement program. Then, use your insights to identify gaps in the product and ensure progress.

Give us a call to learn more about building and testing CSOs as part of your product strategy!