

# Get out into the field with customers

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By Denise Lee Yohn Published: February 8, 2022



(Image credit: LinkedIn Sales Navigator/Pexels)

Fresh, unique and valuable insights about how to get ahead are available to you — if you get out into the field with customers. Business leaders need get out of their offices and get into the field to glean customer insights.

In this new video, I explain:

- Why it's important to out into the field with customers — you'll develop personal insight and greater empathy
- How to engage with customers in the field by asking questions and observing their behaviors
- Who to engage in addition to your most valuable customers and prospects

Learn more – and check out the video I recently posted about [getting out into the field with employees](#).



Watch Video At: <https://youtu.be/LdZgorKlnYY>

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## Transcript

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When did you last spend time with a customer? You personally, face-to-face, in their world? I know the pandemic shutdown made it difficult to do this — but even before then, personal customer engagement wasn't a priority for many business leaders. But we need fresh insights now more than ever, so now that things are opening up more, let's get out into the field with customers.

A few months ago, I posted about the importance of spending time in the field with employees. Now I'm covering the why, how and who for engaging with customers in the field.

First, why — why get out into the field with customers? Primary research, personas and other tools are valuable methods for understanding customers but there's nothing like firsthand experience and in-person conversation to truly understand what your customers want and need — especially now when so much has been disrupted over the last couple of years.

Hearing from customers in their own words humanizes them, personalizes their input and helps us develop empathy.

Next, how to engage with customers in the field. I recommend you ask customers questions *and* spend time simply observing their behaviors, since you can learn so much by taking note of what they do — and don't do — and how.

Be sure to meet with customers in their natural environments, wherever they buy and use your products. They'll feel more comfortable and be more "real" with you. As former P&G CEO A.G. Lafley once said, "If you want to understand how a lion hunts, don't go to the zoo. Go to the jungle."

When I worked for a fast food chain, we would do drive-alongs with people during their lunch hours. And we fast discovered how much impact our store windows had on whether they were willing to turn left into our parking lot or right into a competitors'. This prompted us to change our signage strategy.

Another time, I interviewed customers of a packaged-goods client in their homes and got to see firsthand how some proudly displayed on their countertops the products they bought as a way to signal to themselves and visitors the smart choices they had made. This is something customers might never had thought to tell us or would want to admit in a focus group or survey.

Finally, who — which customers to engage? Of course, you want to talk with and observe your most valuable customers and most attractive prospects since insights from these groups are most important.

But don't limit yourself to them. Talk to lapsed customers — that is, folks who used to buy from you but no longer do — as well as customers of your competitors. You'll glean unique insights about what you might do to win or win back their business.

I realize some of these actions may be pretty basic, but I've found that many business leaders don't do them, either because they feel uncomfortable or they think they're too busy. But they're losing out one of the best ways to develop competitive advantage: know your customers.