

TOOLKIT

# UNDERSTANDING YOUR CLIENTS

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At Smith Made we believe your website should feel like a conversation with your customers. Think back to the last meaningful conversation you engaged in, it probably wasn't with a stranger or if it was then it's likely the person didn't feel like a stranger to you at the end of it. Meaningful conversations establish or strengthen relationships.

Websites need to work the same way if the goal is to generate high conversions and grow revenue. The connection your website makes with your audience should be meaningful, enjoyable and memorable — just like the best conversations in everyday life are.

To make this happen we need to know who our clients are and what they want. This sort of insight will go further and dig deeper than gender, age, profession, income or any other general statistic you might have. Take a moment to think about what you know about the people your business sells to? Who are they? What are their needs and frustrations?

Don't worry if the answers to some of those questions are fuzzy right now. The easy research methods in this toolkit will help you understand your customer's behaviours, assumptions, and motivation. While there are dozens of research tools designers use — here we have put together some that you can quickly adopt and adapt to deliver results for your business.

**Smith Made**

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## PART 1: RESEARCH

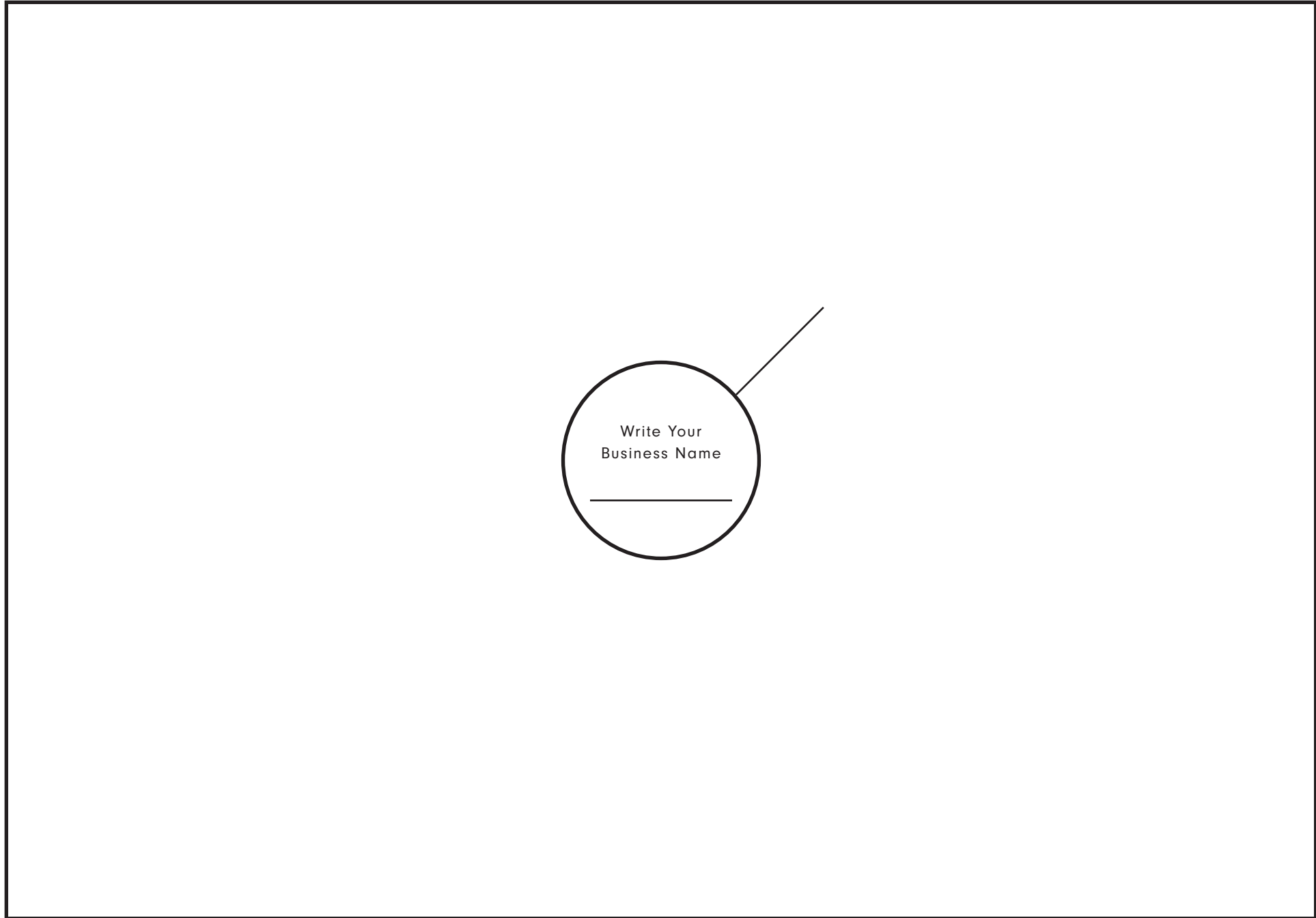
# MIND MAP

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Let's start by using a mind map to organize the broad spectrum of people who are touched by your business and their connections. Mind maps are a great way to capture thoughts and show relationships. Using the template on the next page:

- 01.** Write down the people or groups that are part of your ideal customer group.
- 02.** Now add people who are secondarily connected or associated with your direct audience
- 03.** Think about the connections these people have with your business. Make note of these relationships. How do they hear about you? Who do they hear from?

Save your mind map and refer to it as you move through this toolkit.



# CURIOSITY CONVERSATION

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Speaking directly to your customers is the easiest way to get to know them. Setting up an interview with your target audience, gives you an opportunity to hear them talk about their needs and goals in their own words. Once you set up an interview with a current or potential user — how do you know the right questions to ask?

The Question Ladder is an interview technique that helps you to hone in on a certain topic by asking a series of questions about different aspects related to that topic. It provides a structured overview of what goes into a question; it shows how to combine a range of who, what, where, when, why and how questions coupled with the words like is, did, can, will, would and might. This makes it much easier to think about the best way to get to the heart of the issue at hand, and to build chains of questions that will allow you to gradually reach the heart of more complex issues.

*Source: Development Impact and You (DIY Toolkit)  
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simple questions \_\_\_\_\_ complex questions

	Is	Did	Can	Will	Would	Might
Who	Who is	Who did	Who can	Who will	Who would	Who might
What	What is	What did	What can	What will	What would	What might
Where	Where is	Where did	Where can	Where will	Where would	Where might
When	When is	When did	When can	When will	When would	When might
Why	Why is	Why did	Why can	Why will	Why would	Why might
How	How is	How did	How can	How will	How would	How might

**Example questions:**

- Who is responsible for purchasing decisions at your company?
- Why might you buy a product online vs in-person?
- When did you last make a purchase on Amazon?

**Write Your Questions**

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## BY THE NUMBERS

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There are a wide range of quantitative data tools we can use, but an online survey is a quick and easy method for collecting user data. It's important that you keep it short and write simple, easy-to-answer questions.

When you complete your survey, you'll have a clear idea of who your customers are. Creating an effective audience survey can be difficult. Use this template to make the process easy.

**PROFILE**

Who do you want to survey?

Age  
 Gender  
 Profession  
 Location  
 Etc.

**Purpose – what do you want to learn?**

Write 5 things you want to learn from your survey:

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**Write 5-10 Questions**


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**PARTICIPANTS**

How will you get participants?

Email list  
 In-person  
 Forums/blogs  
 Paid responseservices  
 Social Media

**Tools – Resources to create survey**

Which online tool will you use for your survey?

- Survey Monkey
- Typeform
- Google Forms
- Survey Gizmo



## PART 2: SYNTHESIZE

# DOWNLOAD YOUR FINDINGS

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Now that you have your notes, impressions, survey results and quotes from your research, it's time to download your findings. Use this template to quickly capture your findings and initial themes and patterns that have emerged about your user.

The most important process in the synthesize stage actually takes place during the interview step — taking clear and concise notes during your curiosity conversations with your customers.

Go through and annotate your notes & survey results, highlighting key quotes and memorable points. You should aim to download your findings soon after your interviews, when your thoughts and insights are fresh.

**Five Interesting Answers**

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**Memorable Quote**

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Themes and Patterns

**Motivations**

What do people care about?

**Frustrations**

What frustrates them?

**Needs**

What are their needs?

**Opportunities**

What can you offer them?

**Additional Notes  
and Impressions**

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# EMPATHY MAP

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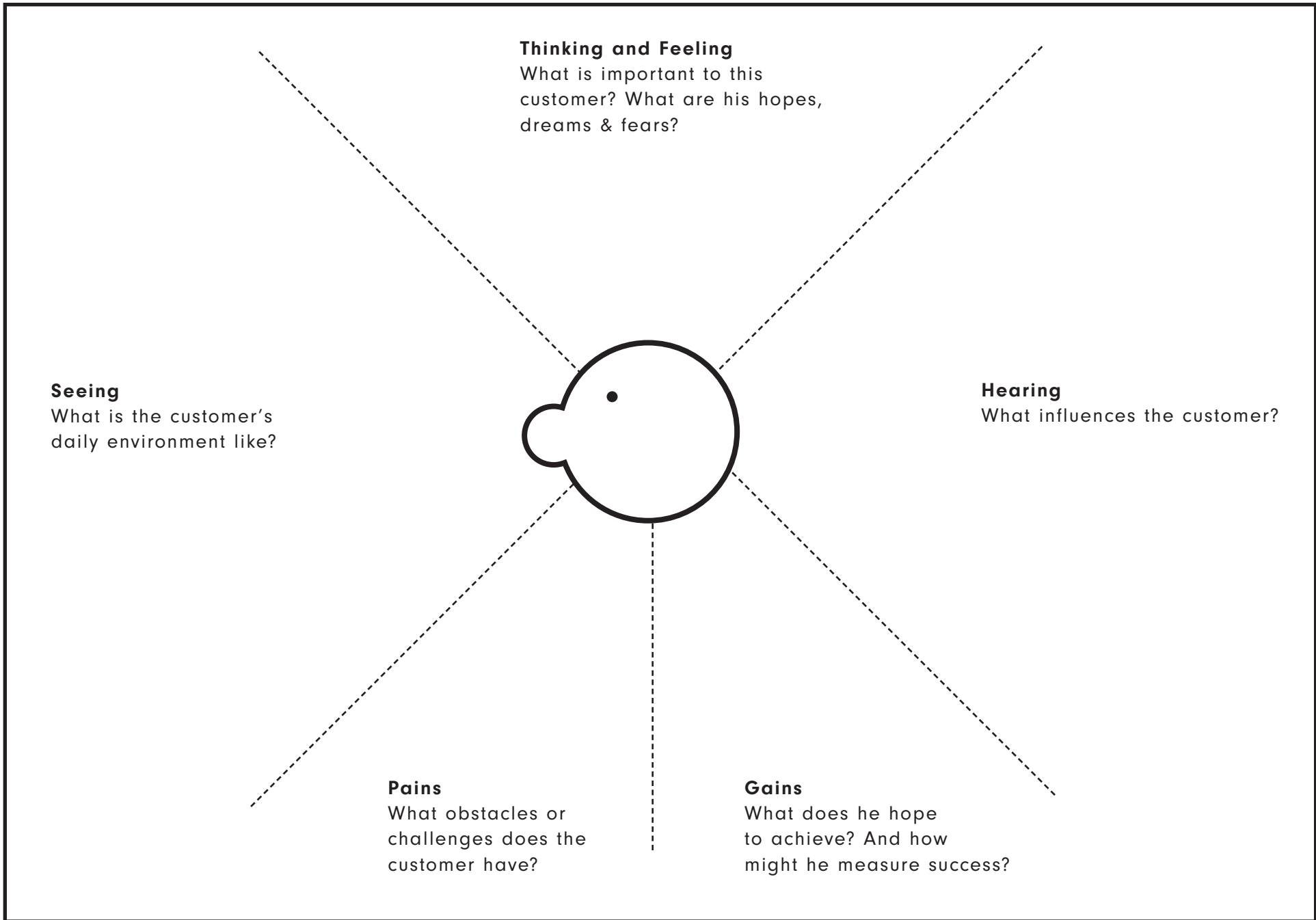
Empathy maps are an easy visual tool to help us communicate the problems and mindsets of our users. With the template provided you can create a simple, digestible persona of your customer(s) based on their attitudes, feelings and beliefs.

The empathy map asks you to consider the customer through five different segments:

- 01.** Thinking and feeling – what is important to them:  
hopes, dreams and fears
- 02.** Seeing – what their environment looks like
- 03.** Hearing – what influences them
- 04.** Pains – obstacles and challenges they have
- 05.** Gains – what they hope to achieve and how they might measure success

Using the key findings and insights you have analyzed, complete the empathy template on the next page. You can create empathy maps for all the different types of users you might have.

*Source: Dave Gray, XPLANE  
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## PART 2: SYNTHESIZE

# CUSTOMER ADJECTIVES

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When you think about your target audience, what are some key adjectives that help describe this user? This is a great way to quickly identify the emotions that your audience evokes and can help decide everything from logo, typography to web aesthetics. Are they modern, feminine and chic or are they approachable, casual and cozy?

Using the list of adjectives provided, circle 5 words that best describe your audience. You can add adjectives to the list, that you feel are missing.

Absorbing  
Adorable  
Adventurous  
Appealing  
Artistic  
Athletic  
Attractive  
Bold  
Breathtaking  
Bright  
Business-like  
Busy  
Calm  
Capable  
Caring  
Casual  
Charming  
Cheerful  
Chic  
Classic  
Clever  
Collaborative  
Colorful  
Comfortable  
Conservative  
Contemporary  
Convenient  
Cool  
Creative  
Cutting Edge  
Daring  
Dashing  
Dazzling

Delicate  
Dramatic  
Earthy  
Eccentric  
Efficient  
Elegant  
Endearing  
Energetic  
Ethereal  
Familiar  
Fancy  
Fashionable  
Fierce  
Flirty  
Formal  
Fresh  
Friendly  
Fun  
Functional  
Futuristic  
Glamorous  
Graceful  
Hip  
Historic  
Honorable  
Impressive  
Industrial  
Informal  
Innovative  
Inspiring  
Inviting  
Lively  
Lush

Majestic  
Modern  
Natural  
Nautical  
Nifty  
No-nonsense  
Nostalgic  
Novel  
One-of-a-kind  
Organic  
Playful  
Pleasant  
Powerful  
Professional  
Quirky  
Radiant  
Rebellious  
Reliable  
Retro  
Revolutionary  
Ritzy  
Romantic  
Royal  
Rustic  
Scholarly  
Serious  
Silly  
Sleek  
Smart  
Soothing  
Sophisticated  
Stimulating  
Striking

Strong  
Stunning  
Stylish  
Swanky  
Tasteful  
Tranquil  
Trustworthy  
Unconventional  
Unique  
Upbeat  
Urban  
Versatile  
Vintage  
Whimsical  
Wild  
Witty  
Wistful  
Youthful

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# USER INSIGHT STATEMENT

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Congratulations! If you have gone through the steps above you have made a serious transformation from thinking about your website as a static tool to a living conversation. You should now have a much stronger understanding of your audience. Knowing who they are and what they want is going to mean your new website is working much more effectively for you.

As a last exercise we want you to create a declaration of your user needs. This User Insight Statement will summarize your findings and help anchor your new understanding.

When you apply everything you've learned to your website you'll provide an experience online that is meaningful to your target audience.

We're cheering for your success.

The user needs to \_\_\_\_\_ because  
user need

\_\_\_\_\_ insight



# NEXT STEPS

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Getting the most out of your web design investment means making research and strategy a top priority. At Smith Made Studio we build websites that engage visitors, converts leads and generates revenue for small business entrepreneurs.

Revenue and lead generation is our first priority. We apply user experience design methodologies and dig deep to understand who your clients and audience really are and how to communicate your message to them. That being said, we believe that no one knows your business and audience better than you. Which is why our team will work closely with you throughout the design process.

Next steps?

Book a complimentary consultation - we'll chat about your goals & vision and set out a strategy to take your business to the next level.

[CLICK TO BOOK A FREE CONSULTATION](#)

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