

Episode 5

SOLVING BETTER PROBLEMS WITH MONA PATEL



[Updated as of 04.30.18]

Michael: Mona, welcome to the Business for Unicorns' podcast.

Mona: Thank you.

Michael: I'm so excited I could barely say Business for Unicorns' podcast.

Mona: I'm so excited!

Michael: Thank you so much for doing this. I'm so excited to chat with you today.

Mona: I'm honored to be here. Thank you.

Michael: Yeah. Well, we met, what, almost over two years ago?

Mona: Two years ago.

Michael: Yeah, and we met through Entrepreneurs' Organization or EO for short.

Mona: Yes.

Michael: For listeners who don't know what that is, I guess I'll start by saying what that is, which is basically it's a peer networking group essentially, peer networking group that helps business owners connect with other business owners for kind of support, personal development. I think one of the features of EO is you get put in a small group of your peers called a forum, and we've been in a forum together.

Mona: Yes, from the beginning.

Michael: From the beginning. It's been a blast. I think for me, forum is a combination of like, I don't know, group therapy and like strategic personal planning for CEOs.

Mona: Or as it turns out to be.

Michael: Yeah, or as it turns out to be, at least. I can't speak for other forums. But we've been in this group more or less two years together, and really, I've been obsessed with you ever since. And as our listeners who are here today, you're just so insanely creative and lead with a kind of no bull-shit approach that really resonates with me. We're both really kind of direct communicators. And direct communication style, I think it's part of why we get along so well. And listeners will have just heard me give you a little intro to you and mention your book, Reframe. So, I love to just start by talking about Reframe. Is that okay?

Episode 5: Solving Better Problems with Mona Patel

Mona: Yes. Absolutely.

Michael: So, first things first. One of the things you claim pretty early in the book is that, these are my words and not yours, that in general we're pretty crummy as business leaders at actually defining what our real problems are. And I've even heard you write about something called like the problem onion which I totally jive with. So, why are we so bad at this and what the hell is a problem onion?

Mona: *laughs* I love it.

So, why are we so bad at it? There are a few reasons. One is that often we define a problem in a way that we know how to answer it. Therefore, it's just really small, it's very limited, you feel really confident and secure that you're going to be able to solve for it. But it's not actually the real problem.

A second common issue is you see the problem a certain way which is not the way your customers see it. And you're looking at it from maybe a cost perspective or a supply or a development perspective when customers are looking at it from a value perspective. That mismatch is probably the most common reason why we're brought in to help companies understand here's how customers see your brand and here's their problem.

I wish there would be more of this problem. But the third is that it's too big and people will define a problem so that they can't solve it. And so, a lot of what we're trying to do when we're talking to clients in that very first step of Reframe is to make sure we're all on the same page with the problem, but also that it's a problem that is worth solving. It's scary enough that you don't know how you're going to solve it, but it's safe enough that you know it's important enough to solve. That sweet spot is what we're looking for.

The "problonion" was a bit of a joke when we first created it, but it was just this reminder to people that there are layers to the problem. And just because you don't know all the answers doesn't mean you shouldn't try to get the first answer. That's a big part of how we approach all of our research, all of our design thinking is what's the next question we need to answer to move us forward.

Michael: Yeah. I love that so much because I find myself doing it all the time. Either like I'm just scratching a surface and I'm like, "No, it's not that big of a deal," or I'm so kind of tapped into the problem that I'm overwhelmed by it. And I've thought about it way too much. And so, finding the right balance, finding, okay, what's really true at the center of all this heartache and drama. And so, can you maybe just give our listeners like an example?

Mona: Yeah. So, we're working with one brand right now who's losing market share. And so, of course, they're seeing their problem as losing market share and they're seeing their problem as customers being fickle and not appreciating or respecting their brand anymore. What we're able to do through our work at Motivate is help them see where they're missing the ball in terms of making their customers happy. The customers are not fickle. The customers actually don't want to switch. It's a big pain in the butt for them to switch. In this case, it's a bank. So, a switch from one bank to another bank, it is a huge pain. They don't want to do it.

Episode 5: Solving Better Problems with Mona Patel

Michael: It's a pain. It's totally a pain in the ass.

Mona: But if the bank that we're working with doesn't hear what their customers need, doesn't embrace technology the way the customers expect the technology to be embraced, doesn't add new features and functions because that is an investment, the customers aren't fickle, they're just not serving them. And that's what we're trying to help them see, that this is a service problem, not a customer and the millennial problem, which is what they're currently defining it as.

Michael: That's such a great takeaway for our listeners because sometimes in your business, you can't see what you can't see. You need an outside perspective. I mean, I think such - the primary value of coaches and consultants is getting an outside perspective.

So, let's just think about the next layer. So, once you've defined a problem in your business, you actually feel like you got a hold of it. You say in your book, and I agree with this, again there's often some kind of fear that's kind of holding us back from being able to solve it.

Mona: Yes.

Michael: Or see it clearly. In Reframe, you defined this kind of eight BS excuse personas, I'm obsessed with all of them, which are essentially kind of different ways fear and resistance kind of hold us back from discovering truly great ideas. And so, can you just talk a little bit about those? You don't have to cover all eight, but just what are those BS personas? And most commonly, which ones come up the most?

Mona: They actually come up for different groups in different ways, and actually they combine in a really funny way. So, my favorite example still is I went to go visit a potential client and I had to go to the gym first. So, I had to go to the gym. I had to sleep. Then, they took my blood pressure, stand up, hop on one leg in heels like do this weird like shuffle thing. And the whole time, there's a scientist taking notes on a clipboard. Finally, I asked, "What are we doing?" And he says, "Well, I need to fill this sheet out everytime you're going to meet with the CEO because the CEO tailors her style of communication per how you do." And the whole time, he's giving me feedback like, "Doesn't seem like you sleep well." "I'm testing between whether you're insecure or arrogant." And I was like, "Dude, I can tell you that one." *laughs*

Michael: Just ask. *laughs*

Mona: I got this. And so, with that, I usually start to talk with that because how quickly we judge that as being a stupid idea. The fact that I go to the gym before I meet the CEO everytime I give the talk, most of the room is saying that's ridiculous. But we don't know. And one of the excuse personas is being a brat. It's judging an idea before you have all the facts on whether this could work or not. Maybe she is using it as screening. Maybe she's actually gathering some data that works for her. We didn't even ask to see the data. We just jumped to that's stupid.

Another one of my favorite ones is a scaffolder. So, often we're brought in to fix the design, let's say, of a website. And people aren't clicking on a button so we're trying to figure out where do we put the button, what do we label the button, how big is the button so that people actually click on it? And

Episode 5: Solving Better Problems with Mona Patel

somehow the conversation scaffolds up to technology, or to what a competitor is doing, or to what they wished they could have done but they didn't do because their boss said this and their colleague said that. And it turns into a bigger conversation that pulls you away from the button problem which is where do we put the button? And I find that a lot of clients will scaffold up into bigger issues instead of just solving the problem.

And then, probably my third favorite one is the square where you point to the rules and regulations of an industry as why you can't do something. So, no one's ever done that before, like this is the way pharma does it. This is what happens at a bank. We have to call it this really long word. We have to have terms and conditions. There's a lot of have-tos that, of course, prevent innovation from happening because you're just going to do what everyone else asks you to do.

Michael: Yeah. Yeah. I love all of those. And you should read the book because there are five more.

Mona: Yeah *laughs*

Michael: Talking to the leaders who are listening right now, how do they start getting those bullshit personas out of the way? How do they just create an environment where people can overcome those fears and anxieties stopping them from really being innovative?

Mona: So, what's happened - my personal experience has been I have to call myself out first. So, we just went through a workshop this morning where I presented the excuse personas to a new group of people who joined Motivate. I went through all of them and I said, "So, here's how we use them. I call you out, you call me out. I call myself out, you call yourself out." It's all allowed here because no one wants to be these. No one wants to be a bratty square.

Michael: Yeah. *laughs*

Mona: Nobody.

Michael: It's true.

Mona: It doesn't feel good. And so, you're helping somebody by showing them that that's what they're thinking and that's what they're doing. There are phrases like, "I feel like you're being bratty right now," or "Do you think you're being bratty right now," versus you're a brat.

Michael: Sure.

Mona: Though I've done that one, too. But calling out is one. Second is playing it out which is okay, so if that's true then what, then what, then what? And you'll end up exactly where you are.

Michael: Sure.

Mona: What if it's not true? And then, we open it up. And then, the third is almost like a seesaw, weighing the fun more than being this. So, a lot of why we do the what-if exercise where you ask as many what-if questions as you can prior to even telling people about these excuses because that was

Episode 5: Solving Better Problems with Mona Patel

so fun, right? Dreaming and coming up with all these ideas is so fun. And then, wah-wah. Oh, we can't do that. We're not allowed to. We don't have enough budget. We're a small business. We've never done this before. All of those things will hold you back. But you just had fun like an hour before. And so, that contrast has been really powerful to say, "Look. You can't stay there." And then we move them to the design process.

Michael: Yeah. I love that it starts with just personal accountability. Just like I can't expect other people to get this stuff out of their way and overcome their fears of I'm not doing it myself, of I'm not leading by that example.

So, for you, which fears count the most for you? What are the personas that most nag you on a regular basis?

Mona: I think, I don't scaffold as much, so I see that one a little. I know this because it's what you see is what you don't do, right? So, I see scaffolding a lot. I see squares a lot. So, I know I'm not one of those. A brat is really hard for me to get out of. I feel like for this audience, I bet there's a lot because as business leaders, we have to be decisive many times, right? We have to be able to just say, "Look. I don't have all the facts, but I have 70% of them. Good enough. Let's go." That trains our muscle to think that way, to make decisions that way. And we miss, we miss a lot of opportunities to say, "Well, tell me what you think," and "What if I'm wrong in this case? What does that feel like?" So, I feel like brattiness is a newer one since being in this role that I've had enough of and now I have plenty.

I think the other, I was really surprised, but there's one called bullied which is being a victim. It's when you just don't feel like you have enough resources to do something big. I was really shocked that I had that one and it shows up a lot. It shows up how quickly I'll assume that it was me and not the situation that made something go wrong, or how much I think about how small my business is and the resources I have or don't have. And it's just me and it's all by myself and all that.

Michael: Yeah. I mean, that victimhood places can be so strong. I mean, it's so compelling. And for many of us, it can be a comfy place because if we're the victim, then it's everyone else's fault. Yeah, that's probably a strong one for me. Yeah. I love that so much. We can keep talking about this.

But something you mentioned I also really loved from the book which is your ability to really use kind of what-if questions all the time. So, can you just talk a little bit about why you love what-if questions so much and where it gets you?

Mona: Yeah. Well, I noticed how often my what-if questions used to end with something really bad like what if I can't, what if I fail. A big transition for me in my own life was what if I don't. That came up when I had two kids, and I was still running a company and even starting the company in the first place, and writing the book, and doing the TEDx Talks. Almost everything big that I've done that I'm very proud of doing had a what if I don't in there. So, I just started thinking about this question and how I was programmed to go negative so quickly. And then, I started paying attention to how many other people are programmed that way and how easy it is to reframe. It's kind of a meta situation, but it's a small phrase that once you start using in a positive way, so many other things could be positive if you chose to see it that way. And you could use, I mean, I have had some really interesting business leaders who don't like the phrase what-if, so how about we. It's the same damn thing, whatever.

Episode 5: Solving Better Problems with Mona Patel

Michael: Sure. It's just the same thing. Take one. Sure.

Mona: It doesn't matter to me what you use. But the idea that you have a phrase in your organization that's a safe zone, where people can throw out an idea and they're not nervous about you, the boss, not liking it or pooh-poohing it, or saying it's yours or whatever it is that you do in your fear state. But giving them an opportunity to give you some advice, some feedback, some suggestions. I've noticed people do it around me. Sometimes they'll tiptoe and they're like, "What if we did this?" And they know I'm not allowed to say anything if it's a what-if question, right? Then it's just, it's a fair game. You don't pooh-pooh it. And so, whatever it is in your organization, I do strongly encourage a phrase that allows the quieter people, the people who haven't quite figured out how to manage those excuse personas to have something that they can use to speak up in an organization.

Michael: Well, I just love that you treat this phrase as like a safe zone because I've been in so many meetings where I thought we were there to brainstorm, where I thought we were there to throw all the ideas in the table and it was going to be a safe space. And so many people would start brainstorming and go immediately to editing. I was like, "What happened to the space where we were just going to throw it all out there without judgement?" And so, I love that this phrase can be a signal, "Hey, this is a judgement-free moment. I'm just going to throw out this idea. You only need to just sit with it. Don't judge it yet. Let it linger for a moment. Let it breathe and see where we get."

Because I think you're so right. So many of us are so quick to go to the what-if this all goes to shit scenario because I think it's a protection mechanism. We want to make sure that we're protecting ourselves and our businesses if things go wrong. Once in a while, we're pretty good about what-if-it-all-goes-great scenario. But the one that you mentioned is the one that we don't think of very often is what if we do nothing? What if we don't tackle this project at all? What if we stay exactly the same? What is the cost of that?

Mona: Exactly.

Michael: That's really a big deal.

Mona: And I forget how preprogrammed we are. Everytime we have a new set of people to join, we do a what-if session. Everytime we have new people to join, we do a what-if session. And at the end, I ask for feedback. Some of the newer staff, every single time, someone has said, it's almost tear level, "I'm surprised you even care about my ideas." It's like we're getting these people in a creative space where they're clearly being hired to be creative and yet still I have new staff.

I'm actually in this as a more tactical way of running what-ifs. I'm super particular about how we do it just because of how bad brainstorming can be in organizations. You bring a boss into a brainstorming session, let me know how that goes, right? And it's really hard to equalize the field. So, what we've done is basically you write what-if questions down silently for three minutes. And I'll talk about why we do it for three. You then share one at a time. There are some rules around that. They are in the book. Then you do it again and you do it again. So, you, boss with the post it note is the same as me, intern that just started. We've equalized the field. We go one at a time. There are a few things that you can

Episode 5: Solving Better Problems with Mona Patel

say. You're not allowed to really say a lot more. And that removes some of the power, not all of it but some of it.

The three minutes is just enough time to piss you off. And that's what I find really interesting that around two minutes in, some of us like you and I, we've done this before. We can keep going. You can give us post it note after post it note. It doesn't matter. We got it. But there are other people who get really frustrated because they believe they have no more ideas. And so then they'll start cheating, or they'll start looking at me, the moderator, as if it's like my fault they don't have ideas, or they'll start snickering or be kind of a jerk, a bully like make funny jokes or try to derail -

Michael: They get uncomfortable.

Mona: Yeah. It's really interesting. And then you do it again. And now they really quote, don't have any ideas. You do it the third time and now they're just pissed. That's when the excuse personas are really great to talk about because it just came up.

Michael: That's so fascinating. I'm going to try that. So, I know a lot of your work as a UX designer and market researcher really centers around kind of unpacking and exploring the customer experience. I talk about the customer experience a lot in this podcast. But before we even dive into customer experience, can you just talk briefly about UX design and market research? For our listeners who are maybe not in the tech space, both terms may be things they're not kind of completely familiar with.

Mona: Yes. Yeah, I'll try to keep it as simple as possible which is you have a customer and you want that customer to do things that benefit you as a company. Usually, it's buy but it can also be register or sign up. It could be refer, a lot of verbs. But there are things that you want this customer to do. Unless you understand the customer, it's really hard to design something so that the customer wants to do what you're requesting.

So, our job is to understand what the customer needs and wants from you and in general and help you map their needs to your business strategy. It's not like you can take what you want and just give it to the customer and be like, "Hey, tell all your friends about this brand and tell them to buy it." They don't do that. But if you can understand what triggered them, what are the barriers for them doing that task that you want whether, let's just say buying because that's easy, what will they do next time? What do they think they're going to do next time? All these questions are really powerful for us to unpack and give to our clients so that they can create business strategies that map to the customer needs.

So, we're often almost a translator at the beginning of saying, "You know you have a strategy. I know you thought it was awesome when you first got here." We have to delicately tell them that that was like done in a vacuum. Here's what your customers are saying. And market research is how we do that. And then here's what they actually want, which is where our design comes in.

It can be something as simple as a website, though actually we haven't done a ton of those. Most of it is really complex systems that come together to change your customer's life. So, we have a client we're working with is a pill with a sensor in it that you take. And then, it transmits to your phone and to the doctor to let the doctor know you took your pill. It's for schizophrenic patients. So, it's really important

Episode 5: Solving Better Problems with Mona Patel

that they take their meds and they don't like to take their meds all the time. And so, that's the kind of stuff that we're working on where you're thinking about what is that whole experience going to be like?

Michael: Yeah. I love it so much because it requires kind of a dialogue. You need to be in dialogue with your customers to understand their experience, to be getting feedback from them. For our listeners who are may be kind of new at thinking about their whole customer's experience, what's your advice to them? How would someone start? For a client who wants to better understand their customer, maybe doesn't have a ton of resources but just wants to start better understanding where their customer is coming from and how they can best serve them, where does someone start?

Mona: It's funny because I probably have a different perspective than other UX professionals but I'm looking at it from an entrepreneur which is something we call a journey map. So, think of it from left to right, the customer's journey and interacting with your brand. From where they hear about it to the first couple of things that they do with anything you own, whether it's a website, or a store, or a piece of collateral that they see all the way through to a - when they purchased and are happy, and b - when they don't purchase. And then, for each one of those journeys, from A to Z let's say, for each letter, A, B, C, D and every step along the way, write down what they do, what they feel, what they think.

By thinking of that, you'll start seeing the cells where you don't have enough information. You don't actually know what they think when they see your collateral or you don't know what they feel or what they do on your website because your analytics aren't there. And you'll start seeing where these cells are not filled in and more of where you actually have more questions than just a blank cell. That's usually where we start where it's kind of our audit of what do we know and what do we need to know. And then, there's a ton of ways that you can answer that. But at least for a start there.

Michael: Yeah. Where are the gaps?

Mona: Where are the gaps?

Michael: I love it so much. For listeners, if you want to get started, that's a really great exercise. It doesn't sound like - it doesn't take that long.

Mona: A couple of hours, yeah, with your entire team.

Michael: Yeah. So start with what are all the touch points from when you first made contact with your client all the way through their journey. And at each moment, I think the three things were what do they do, what are they thinking, what do they feel? Fantastic. And then where the blanks are is where you start.

Mona: That's it.

Michael: Yeah. I love that so much.

Mona: You start feeling it in slowly or you start allocating a particular blank to a person. So, you might give it to a person who manages registration and say, "We actually don't know if the registration

Episode 5: Solving Better Problems with Mona Patel

process is easy or difficult here. We think it's easy but can you ask? And here's how you ask. Please give me one thing that we can do about better, not did you like it?"

Michael: Totally. It's so funny you say this. I've become such a big fan of storyboarding lately. In a workshop we did recently, we got us some storyboarding and it's identical in many ways to this exercise. Do they have thoughts on storyboarding? Do you ever do any of that?

Mona: Love it. Love it. For me also as a visual person, it's really nice for me to see a flow from beginning to end. Also, just the different turns a story can take. I think that for both of those reasons, I still love storyboarding.

Michael: Yeah. So, when people are doing their storyboards, what are the kind of common pitfalls and gaps that you see when working with customers? Where are we, like where are we all dropping the ball the most in a customer experience?

Mona: Probably making assumptions about what our customers actually want. I mean, it is unbelievable. Like a customer will say, "I hate that you guys have this feature." And a client will hear. Well, I mean, they just don't understand the feature very well. It's like it's not what they said. It's not at all what they said. We'll also see that's just one user. It's almost like, and I hate to say it this way but just truthfully there's almost a disrespect around customers and it shows in your design. I do think design is a way to showcase respect for customers.

And so, when you have one that is difficult to understand, or the button is not in the right place, or the phone number has a typo. Like I mean, this is ridiculous sometimes what you see. That just shows disrespect. It shows like I don't really care and I just do what I felt like doing. That's probably the macro thing.

In terms of actual usability issues, now everyone uses templates and standards for the most part. So, a lot of the easy stuff like where does your navigation go when I first started is gone. It's more what is the difference between me and anybody else? And so, it's more of a content strategy that I think a lot of people lack.

Michael: Yeah. That makes sense because you're right. If we're all using the same kind of scaffolding -.

Mona: Wix and Square Space, exactly.

Michael: The same templates, that all, the design part is a little more tapped in probably than it used to be. But in terms of content, what I hear you saying is that we're not all doing a great job of conveying our unique value or your value as a business.

Mona: Yes, exactly.

Michael: So, why is this experience I'm taking you through different than some other website that used that same template?

Mona: Exactly.

Episode 5: Solving Better Problems with Mona Patel

Michael: How is this a different experience?

Mona: And even the presentation of it usually is here's what I like about my own brand versus here are the things that you asked us for that we do for you.

Michael: Yeah, yeah. In Business for Unicorns, we often talk about the difference between the features of your services and the benefits. So I see so often on people's website, it's just like features, features, features. Here's what we do. Here's all about us. But they forget the part that's like what about the person you're trying to sell to. What's in it for them? How is their life going change as a result of interacting with you in this way? And they forget that people forget about that so quickly.

Mona: It's fascinating to me and it's one of the things that I feel like gives me a lot of job security. It's like no matter what, people always want to talk about themselves first.

Michael: It's so true.

Mona: It's so true.

Michael: It's so true. I mean, in the fitness space, we get this I think maybe more than other industries because there are so many fitness professionals who really approach it as out of their love for fitness. So, you see trainers' websites and things. You had personal trainers and you see a lot of it. It's just like the "them show" which is all about them. It's not wrong, right? Certainly, some people pick their trainers just because they're hot. Nothing wrong with that. I might have done that once or twice in my life.

Mona: Maybe me too.

Michael: But ultimately, when you're making big decisions on behalf of a business, you don't want to pick a business because oh, they look cute or they look fun. You want them to know that you want to know that they get you in some way, that they understand your business. And so, I think it's so important. This is so important. So, you talked about design a lot and design is such a big part of this experience. So, how do you start to think about just design in the context of the customer experience?

Mona: I think I just did it in the previous part where people often equate design with aesthetics. It's like the lowercase design of how does it look and maybe how does it feel. For me, design is way bigger than that. It's about every interaction that the customer has with your brand and how you could have made it better. And how you make it better is through design. What I mean by that is that you look for the opportunity or the pain point. You come up with a solution but you're not married to the solution. You're constantly curious about how do I improve, how do I design. A designer will never say I'm done. It's always I'm done right now but not like everything.

Michael: This version is done.

Mona: This version is done. But I'm still going. I'm still curious. I want to see how this lands, and where I can improve it, and what else I can add to it. There's a bit of art and science to design. And so, when I'm thinking about design, the content comes into play. The organizational layout, the what is this going

Episode 5: Solving Better Problems with Mona Patel

to be in two years? How is this flow going to be? And so for us, the design is how do we move people from one behavior to another behavior through design. It's way bigger than how it looks.

Michael: Yeah, yeah. I mean, aesthetics these days have to be on point. I think people have a very low tolerance for crappy-looking stuff especially digital. But I think your point is so well-taken. That's just for the lowercase design. The capital D design is the whole design of the experience which a lot of people just don't ever get to that place.

Mona: They don't get there and it is really hard to measure. It really is. So, when you're looking at small business owners and they don't have the millions of dollars, they have a dollar and it's like do I spend a dollar on design or do I spend it on a feature? I find it time and time again, they go for the feature when at least there should be a good debate about design versus feature.

Michael: At least a healthy conversation about -.

Mona: At least a healthy conversation. Maybe still the feature is the way to go, but often a design will help you triage the bleeding, something you didn't even know was a problem. And then, you can use those funds for design. That is the hard part. The softer part of what we do, it's a tricky ROI. It's a tricky return on investment. It's kind of like how do you measure the value being happy? It's like I don't know. It's just great, so I do it. Same with design. It's great, so I do it.

Michael: How do you measure the value of having really great readable fonts?

Mona: Yes.

Michael: This is like, "I don't know. More people are reading it, I guess." I don't know. It's hard.

Mona: It's hard. It is hard. I mean, you can measure - in the old days, we used to measure how many times people will click or how many times people leave. But that's not a real measurement. I think for small businesses, they're looking for how much more money do I have in my pocket as a result of working with you. Design is a little softer that way. What you end up finding is I love you more because you are well-designed as a brand.

Michael: That makes sense. So, what tools do we have now to better understand our customers that maybe we didn't have five or ten ago. So, I feel like this space is constantly changing and the things we're able to track to understand our ROI in a lot of these areas have changed completely over the last five or ten years. So, I don't know. In this space of understanding our customer experience, what tools do we have now that maybe we didn't have a couple of years ago?

Mona: It's fascinating because I think there are a lot of really great tools. Like there's some online applications that allow you to do a quick survey in a really beautiful way, like Typeform is a great example, right? It's super simple. It's very clean. You can ask a set of people open-ended questions that are fairly easy to scheme through and digest quickly. So, in some ways, we've changed quite a bit because we have access to more people and we can ask them questions quicker, faster, cleaner.

Episode 5: Solving Better Problems with Mona Patel

In other ways, I still find it hilarious that people do focus groups still. It's like we haven't changed at all since 1950s. It's still eight random people in a room coming together to somehow drive strategy. And so, there's a long way to go on the quality of the research side especially where it comes down to I want to hear what the customer is saying about our brand. I don't want them to change what they're saying because I'm in the room or behind a one-way mirror. I want to hear the truth. That's an area that I've been fascinated with over the last couple of years is how do we deliver more truth to our clients, not the filtered one? I don't want anybody to know I said this, but I said it. That one.

Michael: Of course. Yeah. You want to know what they told their best friend after they interacted with your business. Yeah.

Mona: After a few drinks.

Michael: After a few drinks. Yes.

Mona: Yep, that's what I want.

Michael: Specifically. And I know you have some innovations you've been working on in this area. I think it's called Insider Insights.

Mona: Yeah.

Michael: So, tell me about that.

Mona: Absolutely. Think of it like Uber from market research. So, rather than having a set of researchers doing your research, we have a set of people, everyday people, who are tapped into the community that you want to study, but it's not going to be in a study. It's going to be in a conversation where it's very casual, where ideas flow back and forth. It's a recorded conversation for the most part, not always. That is what we study to give you insight. It's different than being in a formal study. Yes, we get consent and all that good stuff. But it is leading to just really juicy tidbits that I've never heard in a focus group room.

Michael: Yeah. Yeah. It's like having just like feedback's buys, right?

Mona: Yes. I love that. I love that.

Michael: It is. I would love to have feedback's buy, people who are just going to go talk to your clients and your customers and have it feel like a casual conversation. They know they're giving you feedback but have it not be in a survey or in a focus group or staring at you the person they're giving the feedback to.

Mona: Never.

Michael: Because you never know you have the good stuff.

Episode 5: Solving Better Problems with Mona Patel

Mona: No. It's like two people who go to a workout class. When they leave, what do they say to each other when no one else is in the locker room? Did they like it? Did they not? They're definitely going to come back. But if they had to give you one thing to improve, what would they tell their friend? That's the kind of step I'm really fascinated with especially in topics like healthcare and finance where people are not that forthright when it comes to the conversation. In fact, one of the ones that we just fielded is a lie that you've told that no one knows you've told.

Michael: Oh! I'm obsessed with that question.

Mona: It's so good.

Michael: That's really good.

Mona: And the client told a lie. So, it's a brand that told a lie, pretty big one. It's a Fortune 100. Now they're going to need to dig out of telling this lie. And so, we're studying for them when people find lies okay.

Michael: Wow!

Mona: That could inform strategy. It's also a very big question, so it could not.

Michael: Who knows where it's going to go, but it's fascinating to look at.

Mona: This is the kind of research I like to do where I don't know where it's going to go because at least then I feel like it's worth the money. I think a lot of people, if you are familiar with market research, you're playing it really safe many times because you stick to what you know and you stick to what you need to know which gives you lines to the box already. And then, you want to somehow be outside of the box. I find it really fun. I'm like nervous about what's going to come out of the result which I think is the way to do it.

Michael: What a great place to be. That's a great place to be. So, when you're doing this kind of market research and you're getting back all these data, as you said, these kind of juicy data that some of which you haven't really seen stuff like this before. How do you go about telling the actionable bits from the noise? How do you sort through it all and be like this is a trend and this seems really meaningful and actionable, and this is just like a series of noise? How do you tell the difference?

Mona: We usually are proposing both to the client and saying we need to know the difference. If it's still that broad, we don't know yet. We're saying this is the beginning - all of it is the beginning of a trend. And qualitative research, we're really careful not to say like this is definitive. It's just here are some stories that we're hearing. Here's a story about a lie where a person told of a straight up lie in that sad story. The next one is it wasn't the truth but it wasn't a lie. And here are a few stories that we heard in our activation around the things that people don't think are a full-on lie, but they are. They refuse to call it a lie. Then there are scenarios in which lies are okay and ethically fine, like you don't want your kids to do certain things so you straight up lie. I did not smoke weed, like that. Great example, right, that came up.

Episode 5: Solving Better Problems with Mona Patel

Michael: Great example.

Mona: And then, there's I don't think lies or something that I want to talk about because -. And it's the story after the lie that we didn't even know we were going to find that we're starting to hear. I mean this is just something that's happening today. So, I don't have all the data. But that's an example of what we would deliver back. And then, it's up to the client to say, "This is what we want to activate on and this is not," which is the hard part because we're encouraging them to take a risk on something. But again, my particular passion area is in getting people to take risks and getting people to use this stuff and say, "You know what? This is new stuff that no one else knows. Let's use it."

Michael: Yeah. So, taking like an example that might be more realistic for our users. So, let's say one of our listeners does a survey, does a Typeform survey or something just to their clients or list of a couple of hundred, a couple of thousand clients and wants to know just general things about how they're liking parts of their experience, how do they go about sorting through that data to make meaningful decisions?

Mona: So, I mean, it's going to come down to how you ask the question. So, let's just make up something. You have a restaurant and you want to know what are people happy with and what are they not happy with, with the restaurant. If you ask that close, if you ask a question that close, you're going to get literal answers like rate these things or give me the top five or whatever that is. That's going to be what people think that they want to keep or they don't want to keep. You probably won't get underlying things from there. But at least that's a good first layer.

Michael: It could be a great start. Yeah.

Mona: It could be, "I don't like the tablecloth," all the way down to, "I think the menu is really old and I wish that they would refresh the menu." What I'd like to ask a little bit more, kind of more in-depth is for example, what's one thing that we could change? What's a crazy idea that we could adopt? And again, you're not looking for the actual crazy idea. You're looking for why they gave you that. I wish you would switch your wait staff around and so we could meet new people because we come here every week.

What's interesting to me about something like that is they want more attention because they're routine, that maybe they don't like the wait staff and so that's why they were asking to switch around, that they want more variety in some way. So, part of it is don't read it at face value, but look at what are the reasons why someone would say something like this and then kind of dig into that. That's my only question. I almost always just want to know what's the one thing I can change.

Michael: Sure. Sure. I love that starting with really open-ended questions, using that as a jumping off point to maybe the next survey or the next phase of the conversation because from there, you can dig so much deeper.

Mona: Yeah. And again, I have a huge bias around close-ended questions only in the sense that yes, they're great for benchmarking but I think like a designer. So, I want to know what I need to change and start designing. I don't want to know how great I am, which is like, "What do you like? On a scale of 1 to 5, would you recommend it to your friends?" All those kinds of questions help me feel great, but they don't actually give me something to sink my teeth into to redesign.

Episode 5: Solving Better Problems with Mona Patel

Michael: Yeah. That makes sense. So, for companies listening or even maybe this is maybe for your clients, what are some signs that a company should even consider doing market research? I think we kind of touched on one already. So, if you do a client journey map and you realize there are some holes in there, that's probably a great place, a great flag that waves that says, "Hey, hey, go do some market research. You need to ask some questions." But what else? What are the signs that come up that will tell a company, "You need to be asking more questions doing a little research about what your customers want."

Mona: I think when there are actions that you don't have an explanation for. We just talked to ecommerce client about people putting things in their cart and then not buying them. And they said, "We know it's a phenomenon that exists in general, but why on our site like people love us. I don't understand why they're doing it on our site." That's a great example.

Michael: I love that.

Mona: Or there's a new market that they think or is coming to their experience. So, let's go back to the restaurant. It's a new demographic that's coming in and just want to know what do we need to change in terms of our strategy to get more of them to come in. It's kind of interesting and exciting that younger people or older people or a different generation or who knows, right? But you start seeing a shift in who's consuming your product or your service to understand that. I find competitive intelligence is really fascinating. Just to know even if you're doing great, what is happening in the world around you that you should know because it might be coming your way. So, that's another one.

Michael: That's some great stuff. So, if your clients are doing stuff you don't understand like hey get curious. But why are they acting that way or taking that action or not taking that action? I love the competitive one. What's going on in your industry? What's going on with your competition?

Mona: Or even outside.

Michael: Or even outside of it. And the one in the middle you said was something I can't remember what it was.

Mona: Me neither now.

Michael: Okay. We're going to do great. We'll do great at that. *laughs*

Mona: Cut! *laughs*

Michael: Cut! *laughs*

So, wait. So, one of the things I want to touch on because I know this comes up for a lot of people, when I first think of market research, one of the first things that pops into my head is just dollar signs. Historically, it's just been something that costs a lot of money. It's just been pretty expensive. And I know slowly we have more and more tools like survey tools to do this. But how can a smaller company really do quality research?

Episode 5: Solving Better Problems with Mona Patel

Mona: I would pick a good question that's worth the money. Honestly, like I have a different answer which is some of these methods are really robust and will give you a lot of strategic direction. It's a Mercedes. So, that's what it costs. I wouldn't drive a Mercedes all the time everywhere if I didn't have the funds to do it, right? So, I'd be really smart about when I bought it, how I bought it, and why I'm buying it, so same thing. Think of a question that's worth the money.

And for everything else, I would definitely use some of the easier hacks. I think in the next 10 years, it's going to be even more cost-effective ways of getting market research done. There are some really awesome new startups in this space. But for now, if you're going to do the more traditional, I need to sit down and really understand why a consumer is doing a certain thing, make sure that's a really important why that you're asking.

We have fairly large clients. So, sometimes they have the luxury to ask a smaller question. But I still think it's our job to make sure we're giving them a big return for the money that they're spending. And so, make sure you're working with somebody who does that for you and says, "Listen," whatever the number is, 2,000, 10,000, "Is this question worth that money?"

Michael: Yeah. I love that so much, that regardless of you're doing it in a small budget, big budget -.

Mona: It doesn't matter.

Michael: In-house, with external consultants, I think a great market research is what I'm hearing you say, it just really starts with a great question.

Mona: Yeah.

Michael: A question that if you had the answer to, if you had more insight into that answer that you'd be way better off and your clients would be way better off for it.

Mona: That's it. And then, make sure you pick the right method to get that answer, right? So, don't scheme. So, if it's that big, now you can see how like a quick SurveyMonkey would just, you know, a small sample is not going to give you that answer.

Michael: Not going to do justice to it, yeah.

Mona: Right. Exactly.

Michael: That makes sense. So, I want to switch gears a little bit because you have so many super powers. And so, I want to talk a little bit about kind of personal brand. Because one of the many things I've been so impressed about since I've known you is just your ability to kind of promote yourself as a personal brand in addition to your business. And so, when did you start thinking about yourself this way or I don't even know if you do.

Mona: I don't.

Episode 5: Solving Better Problems with Mona Patel

Michael: But at some point, you have a book and you have done a ton of speaking. You've done a lot of other writing. You really have a really fantastic personal brand. So, when did that part of your career start?

Mona: Oh, wow! It's such a great question. I definitely didn't do it with an intention to do it. And so, I'm going to back into how. Most of it has been because I was really pissed about something. I know the first article that I wrote, and writing was my safe way of starting a personal brand. I would highly recommend anybody who's shy, more like me, to start there because you'll get your voice. And then when you write, you'll be asked to speak about what you write about.

But I started writing and it was because I went to a panel and had a person on the panel who was just mean. She was just the most ridiculous kind of mean. I found that so infuriating. I think the article is even called like Lean UX and Mean UX, like know the difference or something. I don't know, some cheeky, obnoxious thing like that. But I just found her so rude and I hated it because it's such a small community. Why are you being so mean? And that was the article. I had to write it because I was so frustrated and I wanted her to know and other people to know that's not okay. So, it's almost like when I get triggered into a place where there's not enough justice around something, I write.

Same with the book, I went to a meeting. We were hired. It was a huge contract of ours to do all this research. We presented the research and then the client said, "You know, this is just so different from what we expected, in a great way, but it's too much for us to do. We're not going to follow through." Big brand. And the beginning of the book started in the cab on the way home where I was talking into my phone and I was just like, "I've had it."

So, the personal branding for me has been it happened because I wasn't afraid to share my opinion when things got unfair. For me, it had to get unfair for me to want to speak up. Writing was a safe place. And then, I also am really competitive. I really am. So, if somebody tells me I can't do something, I'm all over it. I'm all over it.

Michael: Well, I love that because I think it's maybe a Hemingway-ism. But you have to kind of write from the things that hurt, right?

Mona: Yes.

Michael: Like if you really want to write something that people give a shit about and will want to read and share, it has to come from a place of emotion to some extent. And it's hard in a business space to do anything from that emotional place. People oftentimes are just looking for information. But I think one of the things that resonate so much about the stuff that you've written, I've read almost all of it, is that it does come from a place of personal passion that's so clear, that you really are putting this information out there because you give a shit. You want to make people's lives better and people's businesses better. And it's so clear. So, I love that. That's great advice for people listening.

Mona: Thank you for saying that.

Michael: Yeah, of course. That if you have things that are really, that really push your buttons in your field or in your business, if you have things that you think are truly unfair, that's a great place to start

Episode 5: Solving Better Problems with Mona Patel

making content for. Because you'll connect with other people who also see that injustice or see things that can be better, see that things can be better.

Mona: It's that connection. I think that I don't do it for me. I do it for the connection. I do it for someone else. I wait for that email from someone else saying, "Thank you for writing this. I've been feeling this and you articulated it." I feel like I'm of service. And again, you already heard about design being a form of respect. Writing is a form of respect. Sharing is a form of respect. And respect is a big value for me. It's the way I grew up. It's something that I want to teach my kids. And so, I do it for that reason. There are times where I'm exhausted and there are times I know that some haters will look at it the other way.

Michael: Haters gonna hate.

Mona: Haters gonna hate, yeah, exactly. And most of that comes across as I don't have time to do that. I'm working on my business. You'll hear like little snide comments like that. But again, you got to do you. I feel good about it. So, do stuff that makes you feel good. That can be anything from writing to blogging to just Tweeting.

Michael: Yeah. Well, I found the same to be true. And it's only been a year or so that I've been writing at all for public consumption. The blogs I've put out that have come from a really emotional place. And many of them, a place of frustration like yours have been the ones that have gotten the best traction, by far are the ones that are like emotional and personal.

And even the start of this podcast came from a place of like, "Well, crap. I love podcasts." And business podcasts mostly suck. They just weren't full of nuanced conversation. They were full of like a lot of sound bites, a lot of sound bites of people just giving your top three tips for social media marketing which is, I think can be really useful. But I wanted to talk to people who are really running businesses and managing businesses and talk about what it's really like for them. And so, even this podcast is a content that came out of a place of frustration for wanting to hear more conversations with real entrepreneurs like yourself.

Mona: And I think you're onto such a beautiful trend now around authenticity. I just met one of the top three for social media podcast guys and he's so different in person than on his podcast. And as I study that, I was like, "How long is this going to last, this persona that you've created for your personal brand where there's like finger clicks and gun like phew, phew?" I don't know how long that's going to last. It's disgusting to me. So, I hope more of us who are trying to be more authentic rise up.

Michael: And for some people having a game show podcast is super authentic.

Mona: Maybe yeah.

Michael: When I first think about making this, I was like, "Oh, do I need to make it fun so people will listen?" I was like, "But I'm not really that kind of person."

Mona: You're fun naturally.

Michael: I'm fun but like I am not a sound effects fun kind of person.

Episode 5: Solving Better Problems with Mona Patel

Mona: Thank goodness for that *laughs*

Michael: And so, it turns into just conversations and I got rid of all of those ideas. Sorry.

Veering back to the topic, one last question which is this, which is for the folks listening who are newly looking to define their personal brand, what advice would you give to that entrepreneur or business leader looking to just start understanding what is my personal brand and how do I start sharing myself in a way that's meaningful and will attract like-minded people. Where do they start? What's your advice to them?

Mona: It's a bit of a harsh question. But to three people, at least three, I go for ten, people who you feel you've made an impact in their life, ask them what the impact was. Be prepared for them to say, "Aahh," because that's probably where you need to start. It's actually, again, I don't think a personal brand is about what you want to put out. It's about what other people need from you. And so, if you can take ten people, three people, and say, "What have I done for you?" And if they can articulate that for you, start with that. Start by giving a little bit more until you have those ten people.

It's funny. I remember when I did that, I heard, "We like how you just tell it to us straight." And I found telling it to people straight really uncomfortable. We did these tough love reviews. And when people, on a scale of 1 to 10, they're allowed to say how they want feedback. When they say 10, I start sweating. I don't like giving that. I'm direct, but I don't like being blunt or offensive in any way. But yet, that was the thing that I heard in like 7 out of the 10 times I asked people. They said, "You know, you tell us things that nobody would tell us."

Michael: Yeah, yeah. Well, I'd make an argument that that's because you're really perceptive, right? I think you're really - what's the other word for perceptive that I'm looking for? But you can't think of it because I'm talking about you.

Mona: Awesome, amazing.

Michael: Well, I think I'll use one of your words is that you have a lot of insight, like you're really good at watching and learning. And so, I think it's not just that people love that you give it to them straight, but you give them things that maybe they never saw in themselves and other people didn't think to articulate. And so, I think it's that. You have a really great eye and really great ears, great ears.

Mona: Thank you.

Michael: Yeah. So, I think that's also – because I think similarly, we can be direct when we need to be. But we're not looking to hurt anyone's feelings.

Mona: No. It makes me sweat.

Michael: Yeah.

Episode 5: Solving Better Problems with Mona Patel

Mona: It's not my favorite thing. But I say that because the thing that people might need of you may not be easy and focus on that for that personal brand. Really, it's not the easy thing for you, the thing that's going to bring you business, none of that. It's what you need to do for other people.

Michael: Yeah. I love that. That's such a great way to start. So, if you want to start your own personal brand, start with a little market research.

Mona: Yes. So, I know. Did I do that?

Michael: You did. It's a little market research project. Just go find some people, minimum three, Mona is suggesting ten. And just ask them, "What's the one way I've impacted your life?" If that's too harsh for you, I'll offer alternative if I may which is just what do you think my superpowers are?

Mona: Even better.

Michael: Something like that. What do you get out of our relationship? Anything that helps you understand how people see you more and what is it they really value that you provide in their lives, I think that's a great way to start.

Mona: Yes, love it. I love it.

Michael: Good for you. That's amazing. I'm going to switch gears because we're coming up the better part of an hour. So, look at us. Look at us. And I want to end like I do with everyone with our final five questions.

Mona: Okay. Let's do it.

Michael: So, these are the same five questions I ask everyone.

Mona: Oh, gosh!

Michael: Are you ready for your final five?

Mona: Oh, I'm scared! Just do it.

Michael: *laughs*

It'll be painless. Question number one, what is your morning routine?

Mona: I have a weird one which is I do what I want for an hour. So, sometimes that is sleep. Sometimes it's to play with my kids. Sometimes it's read. Now, more and more, it's been workout. I'm like getting into it. It can be meditate. But it really is customized. It's just an hour reserved for me that no one else can really interfere with unless I invite them into it. Even my kids know. So, they're like, one will, sometimes I'll invite them into doing yoga with me or something. But it's only an hour really that I have for me.

Episode 5: Solving Better Problems with Mona Patel

Michael: Good for you. So, first hour of the day, whatever the fuck I want.

Mona: Whatever.

Michael: It's my first cursing of this podcast. Wow! I'm really slacking.

Mona: Fuck yah! *laughs*

Michael: I'm so over slacking in this hour. I love that answer.

Number two, what activities give you a sense of renewal? And when I say renewal, I mean like a sense of your cup being filled and you being energized and ready to tackle your day. So, what reinvigorates you?

Mona: Volunteering is huge. The way I choose to volunteer is using what I do in markets where they don't have access, so helping a homeless charity or something along those lines. I feel amazing those days.

Working with kids, I think I always wanted to be a teacher. So, anytime I can spend time seeing neurons fire and kids like in their eyes, it's like huge for me. It reminds me how big the world is and how much we have to do for it.

Working out is actually really great. I was reminded of that in actually our last EO meeting where I was pushed to work out harder. And it's been big for me this month and just push past what you think is your limit.

Talking to my mom is another one. She's such a wonderful person and she's just constantly like, "What are you doing?" Thinking about you, that's her answer all the time. So, it's just like she's such a loving person. It's gushes of love that I do appreciate.

Michael: That's amazing.

Mona: Yeah.

Michael: Yeah. So, you want to get renewed, talk to mom, go work out super hard, work with kids, give back.

Mona: Or whatever, yeah, whatever a group is that you start realizing my world and my life is just not that big of a deal.

Michael: Yeah. I love that. Awesome.

Question number three, this can be a tough one, what is one book or learning experience that taught you the most?

Episode 5: Solving Better Problems with Mona Patel

Mona: My business didn't do well one year. I was just on this like, oh, I can do anything and this is so easy mindset. So when it didn't do well, it took me a long time to even realize that it wasn't doing well and that I had to course-correct. It wasn't going to course-correct for me. I actually had to make some tough decisions. That is one of the most painful parts of my career that I've had. And so, I learned a tremendous amount from there. Not that everything has been high since then, but the importance of keeping everything in a place that feels healthy and good has been there since then.

Michael: Yeah. That's huge. We talk about it so much that it can sound cliché, but we really do learn so much more about ourselves when things are going poorly, don't we?

Mona: Oh, yeah. I'm like, "Well, who's going to solve this problem?"

Michael: Yeah. "Oh, I guess it's me."

Mona: "Oh, me?"

Michael: "I guess it's me."

Mona: "What?"

Michael: Yeah. Yeah. That's one of the real gifts of having you own business.

Mona: Yes. That's the way to put it.

Michael: Number four, number four, if you could have one superpower, what would it be?

Mona: Oh, wow! So good. In addition to the ones I already have?

Michael: In addition. It's a new one. It's a new one.

Mona: *laughs*

I would like to be able to control time like speed people up sometimes, slow them down sometimes, including myself.

Michael: Yes, faster and slower buttons. Yes.

Mona: Yes, fast and slow. Yeah.

Michael: That's really good.

Mona: I want everyone to have a DVR that I control.

Michael: Yes. I love that. I love that.

Episode 5: Solving Better Problems with Mona Patel

Last but not least, number five, what is the last thing you tend to think about before you go to sleep at night?

Mona: I'm such a good sleeper. I am so good at just clearing my mind. I try to make it, the last conscious thought is around being grateful for something. I just read a lot about that tying to happiness and it just makes me feel good. No matter what, it makes me feel good at the end of the day. And there are so many things to be grateful for.

Michael: Yeah. Yeah. It's the one I hear the most in this podcast.

Mona: Yeah.

Michael: It's just like if I have a choice and I've really been intentional about it, I will fall asleep with some amount of gratitude.

Mona: Yes.

Michael: Yeah. That's huge.

Mona: But usually, I just conk out. *laughs*

Michael: Usually. Yeah, hits the pillow. I can't tell you what happens next.

Mona: Yeah, I'm out. Actually, it's three seconds and I'm into REM.

Michael: Same here. Well, you did it. That was your final five.

Mona: Yay!

Michael: Yay!

Mona: Those are great.

Michael: It's so fun, right?

Mona: You are great.

Michael: Thanks.

Mona: Thank you for inviting me to this awesome experience.

Michael: This was such a blast. This was such a blast. Before we officially wrap it up, how can listeners keep in touch with you or learn more about Motivate Design, learn more about Insider Insights, your books? How do we find you?

Episode 5: Solving Better Problems with Mona Patel

Mona: So, motivatedesign.com has everything. It has my email. It has all of my social. On LinkedIn, feel free to connect there. Twitter, Facebook, Instagram, all of it is fair game for anybody. Facebook, you're getting a lot of my kids' photos. But other than that, please feel free to join in.

Michael: I love some kids' photos.

Mona: Yes.

Michael: Yeah.

Mona: They're so cute.

Michael: They're adorable.

Mona: They're so cute.

Michael: Awesome. Thanks much, Mona.

Mona: Thank you.