**Customer Discovery Interview Planning and Preparation**

**REQUEST FOR MEETING**

"Hello, I am <name>. I'm a <describe role> at the University of XXX. I'm part of a program sponsored by the National Science Foundation to help researchers like me improve the impact of our research by talking to people outside of the research setting. I'm contacting you as someone who has expertise that could be very helpful to me in my area of focus. Would you be willing to help? Can I schedule a <describe encounter you would like>?"

OR

“Hello, I am <name>. I'm an entrepreneur considering the launch of a new company. I'm part of a program sponsored by the National Science Foundation to help innovators like me to improve the success rate and impact of business launches. I'm contacting you as someone who has expertise that could be very helpful to me in my area of focus. Would you be willing to help? Can I schedule a <describe encounter you would like i.e. 15 minute Zoom conference> with you?"

**INTERVIEW FOCUS**  Ecosystem/Market  Problem/Needs  Solution/Feedback

Interviewee(s):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Location:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer Role:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Customer Segment:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Type of Interview:  F2F  Web Conference  Phone

**MEETING STRUCTURE**

*Your initial interviews are to understand customer pain/needs and more information about the ecosystem. Pain and gains hopefully relate to your value proposition. What MUST-SOLVE problems do customers have? Also, questions that relate to the ecosystem and characteristics of the market you envision playing in are great as well. Who are all the stakeholders? What drives them? How does information, product and money flow? Do they know anyone they can refer you to?*

1. **GENERAL GUIDANCE**

**Try to get people telling stories. Ask open ended questions, such as:**

* + Tell me about . . .
  + What happens when . . .
  + Why is that important . . .
  + Who else gets involved . . .
  + Is \_\_\_\_ a problem – why or why not . . .
  + How do you currently address the problem . . .

1. **INTRODUCTION**

*Quickly introduce everyone in your group…ask the interviewee to do the same. Describe the purpose of your meeting. Reference some phrases from the “Request for Meeting” above. Use vague descriptions for context as needed. Do not describe your invention, product or service. DO NOT SELL! “If you don’t mind, we will not be discussing our specific work because it might bias your answers. We are here to understand your unbiased view of how things work and what is important.”*

1. **INTERVIEW TOPICS (you won’t cover all of these in any given interview)**
2. **CURRENT ECOSYSTEM/MARKET UNDERSTANDING**

Process (Information, $’s, Product/Materials or Service): typical day, steps, dependencies, flows, timing, bottlenecks, things that go smoothly, interruptions/pauses. Place in overall system/ecosystem, key equipment, important system resources.

* Question 1:
* Question 2:
* Question 3:

People: roles, titles, interactions, key players

* Question 1:
* Question 2:
* Question 3:

1. **CURRENT HYPOTHESIS/ASSUMPTIONS TO TEST**

**Problem/Needs:** You are trying to uncover problems that are big enough that they MUST HAVE your solution. Think about: satisfaction, dissatisfaction, problems, needs, quality, delays, excessive costs, what best performance looks like, what upsets the system?

Pains (with detail about magnitude and who else is affected)

* Question 1:
* Question 2:
* Question 3:
* How do they currently deal with pain?

Potential Gains (with detail about what a better system might look like)

* Question 1:
* Question 2:
* Question 3:

**Value Proposition** Test/validate hypotheses on the value your product or service provides. When you can connect pains and gains with your value proposition statements, ONLY THEN have you figured out how to communicate the value of your product/service.

* Value Prop A: Question 1:
* Value Prop A: Question 2:
* Value Prop A: Question 3:
* Value Prop B: Question 1:
* Value Prop B: Question 2:
* Value Prop B: Question 3:

1. **ADDITIONAL CONTACTS**

Always ask for additional contacts! They are the life blood of the Customer Discovery process.

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| --- | --- | --- | --- |
| Name | Role | Contact Info | Comments |
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