

# TE 250: Week 6

## Customer Discovery

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# Technology Entrepreneur Center

*Now Hiring!*

## **TEC Events Intern - \$12.00/hr**

TEC is seeking an Events Intern to assist with our events and programs. The intern will gain valuable skills in planning, coordinating, and organizing events like the Cozad New Venture Challenge!

*Please email your resume to Kearsa Rawson and explain why you are interested in this internship.*

**DEADLINE TO APPLY | FRIDAY, FEBRUARY 25**  
**KEARSA RAWSON | [klawson@illinois.edu](mailto:klawson@illinois.edu)**



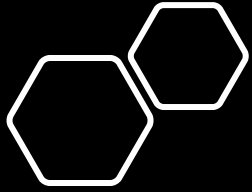
# Agenda

- • Assignments - Past
- Customer Discovery
- Assignments - Midterm
- Examples
- Case Studies

# Assignment #3 – Individual Assignment

- Build a petal diagram to highlight your strengths and weaknesses.
- Perform a SWOT analysis for your business idea.
- This is an individual assignment, not a team assignment.
- Submit your assignment in the format you prefer, graphic or list.

FEEDBACK



# Assignment #4 – Individual Assignment

Draft 3 value propositions for 3 different stakeholders within the same Industry/Customer Segment (9 total). Use the VP format provided in class.

Pick one role/VP that best represents the PRIMARY VP for your business. Now complete a Business Thesis Template format as provided in class (Elevator Pitch).

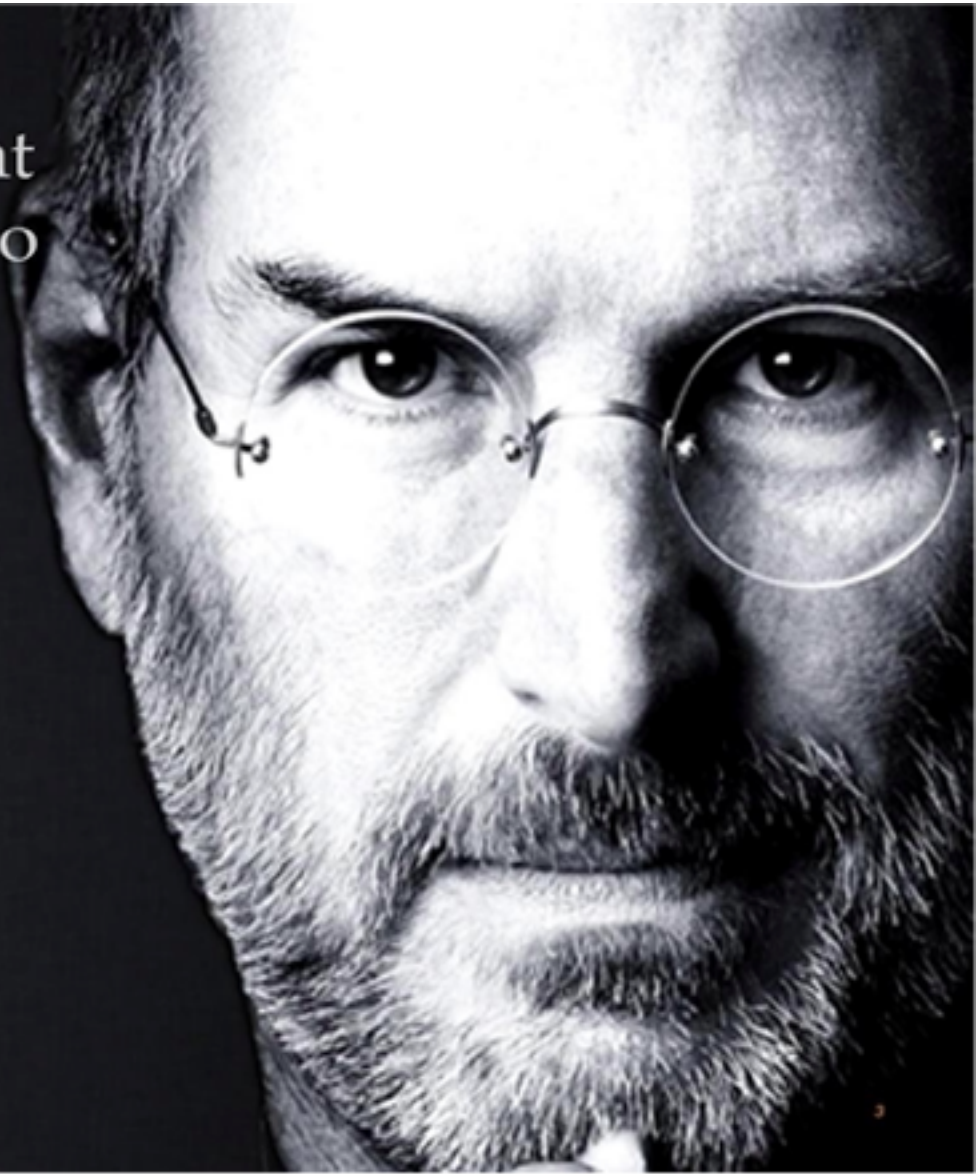
The Business Thesis Template is available in the Resources Tab in Compass as well.

# Agenda

- Assignments - Past
- • Customer Discovery – Primary Customer Research
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“You can’t just ask  
customers what they want  
and then try to give that to  
them.”

“New ideas come from  
observing something,  
listening to people,  
experimenting,  
asking questions  
and getting out of  
the building!”



The picture can't be displayed.

# Goal of PMR

- Understand the problem/opportunity – the REAL one
- Not for customer to design your product
  - Caveat: Eric von Hippel: User-Driven Innovation
- Be open to being surprised

# Why Do Interviews?

- Allows us to **Learn Fast**...current assumptions are WRONG
- Allows us to **test value** and whether **a problem is really a problem**
- Builds **deeper empathy** with the customer
- Creates **shared understanding** across the team
- Tells us the **"why" behind customer behavior**
- Sparks **big insights** and mental leaps
- **Everyone** on the team should conduct interviews

So what about *MY* technology?

**NOBODY CARES**

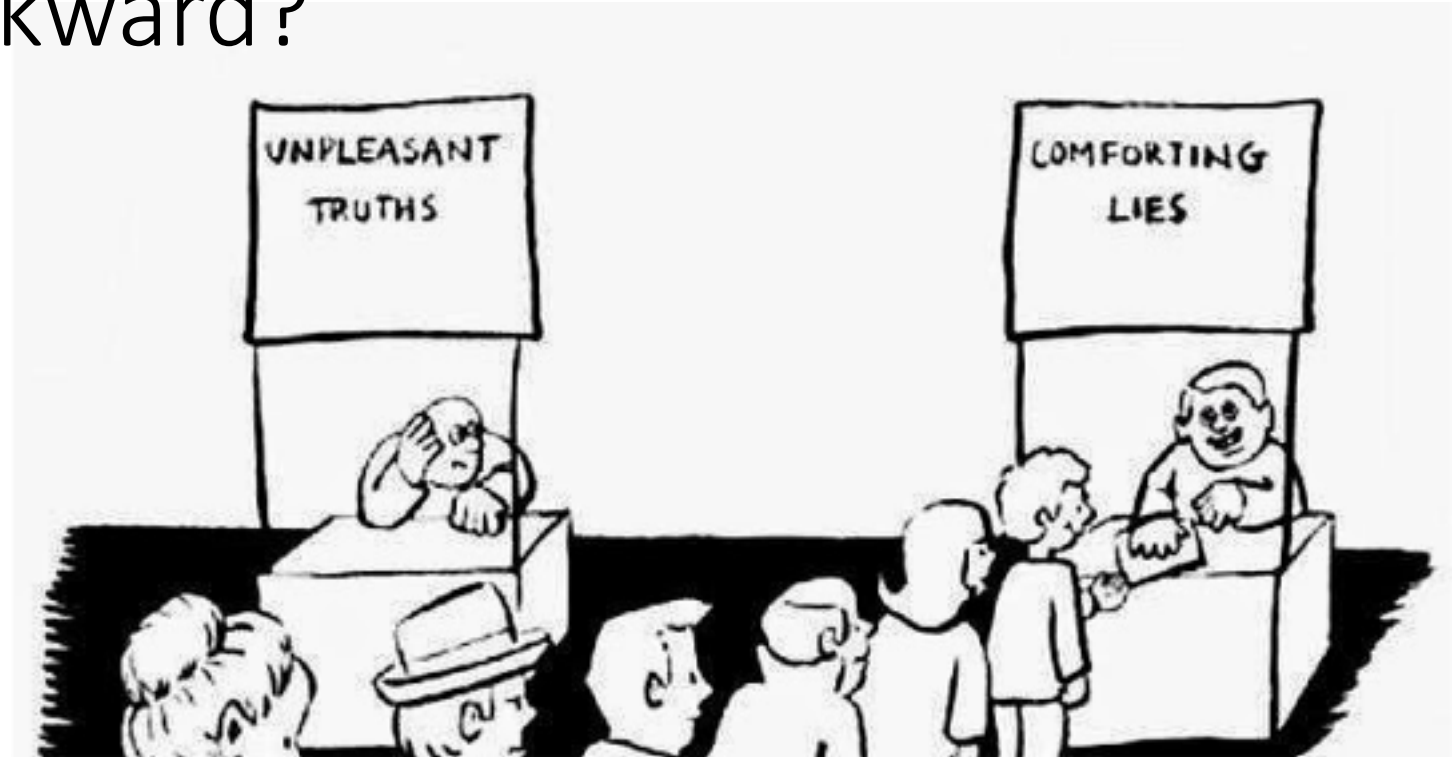


They only care about  
what it can do for *THEM*.



**Your business idea  
needs to **solve a problem**  
your potential customer  
will **PAY** for.**

Why endure the awkward?



**Hypotheses -> Facts**

GET OUT OF Your  
Comfort Zone!!  
Talk to People...  
*you Don't Know*



**Hypotheses -> Facts**



# Who is a Customer/Stakeholder?



**ANYONE** who appears on any of the workflows, decision trees, or value chain maps that could be involved in the business in any way.

You must talk to them all! **I** ILLINOIS

# The Process: Scientific Method for Customer Discovery

- Hypothesize

*Guess*

- Test – Interviews

*Ask*

- Assess & Analyze

*Listen*

- Adjust – Pivot

*Guess Again*



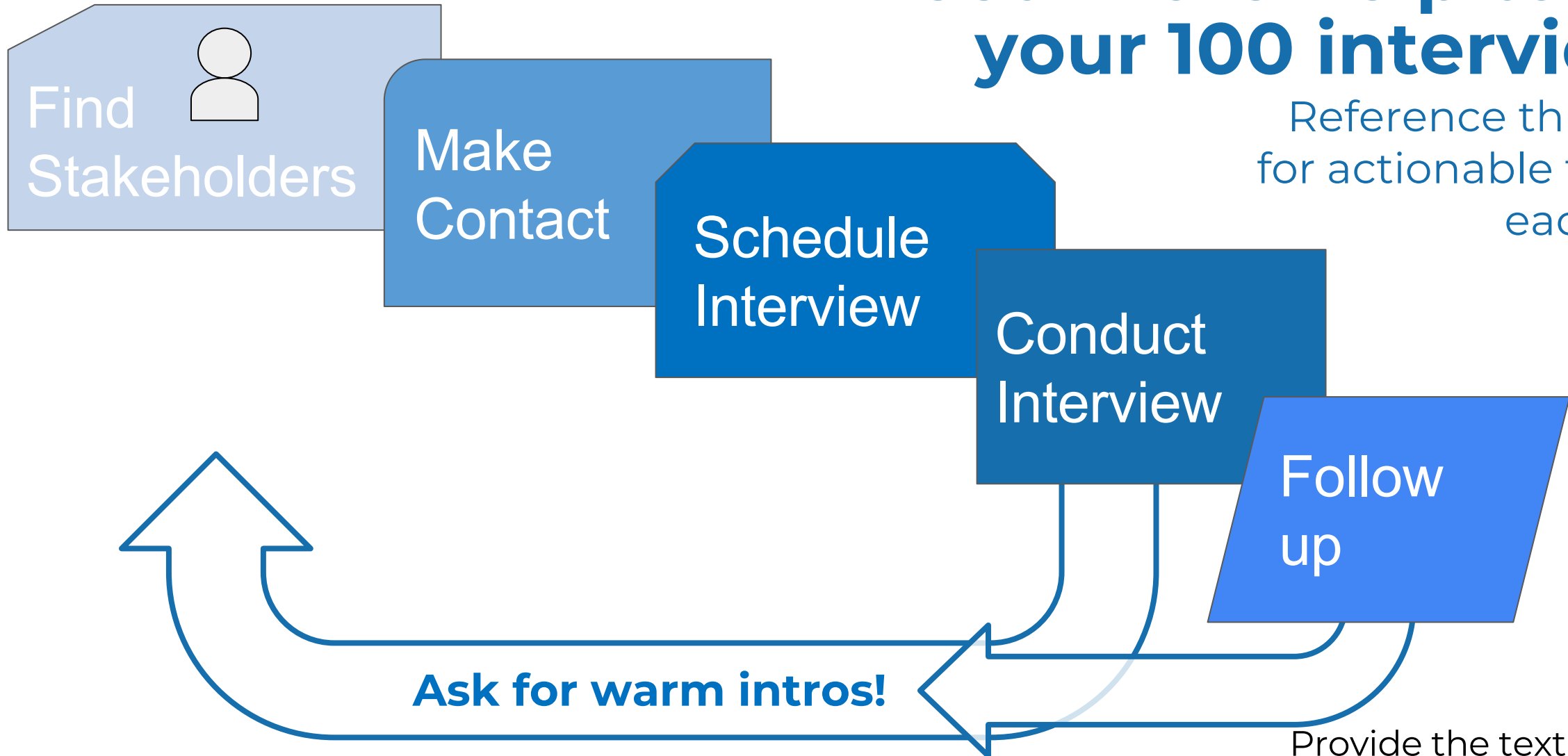
# The Interview Life-Cycle Process

# Steps

- Find  
LinkedIn, conferences, tradeshow, competition, customers, etc.
- Get  
Use **your** natural appeal, use **their** natural appeal
- Prep/Execute  
Don't waste your time/don't waste their time.  
Adhere to social norms...be polite, deferential and appreciative
- Wrap  
What else, who else, can I call again
- Analyze  
Looking for BIG audacious problems, poorly solved, that you can address
- Record  
Notes real time, maybe pixs, no recordings,  
**INSIGHTS**

# So you've realized you probably need more help to get your 100 interviews

Reference this deck for actionable tips for each step



Provide the text for the warm intro email, make it easy!

**How do you find  
stakeholders?**

**Most successful...  
GO where they GO**

**GET OUT of the building**  
(finally! We can do this again!)

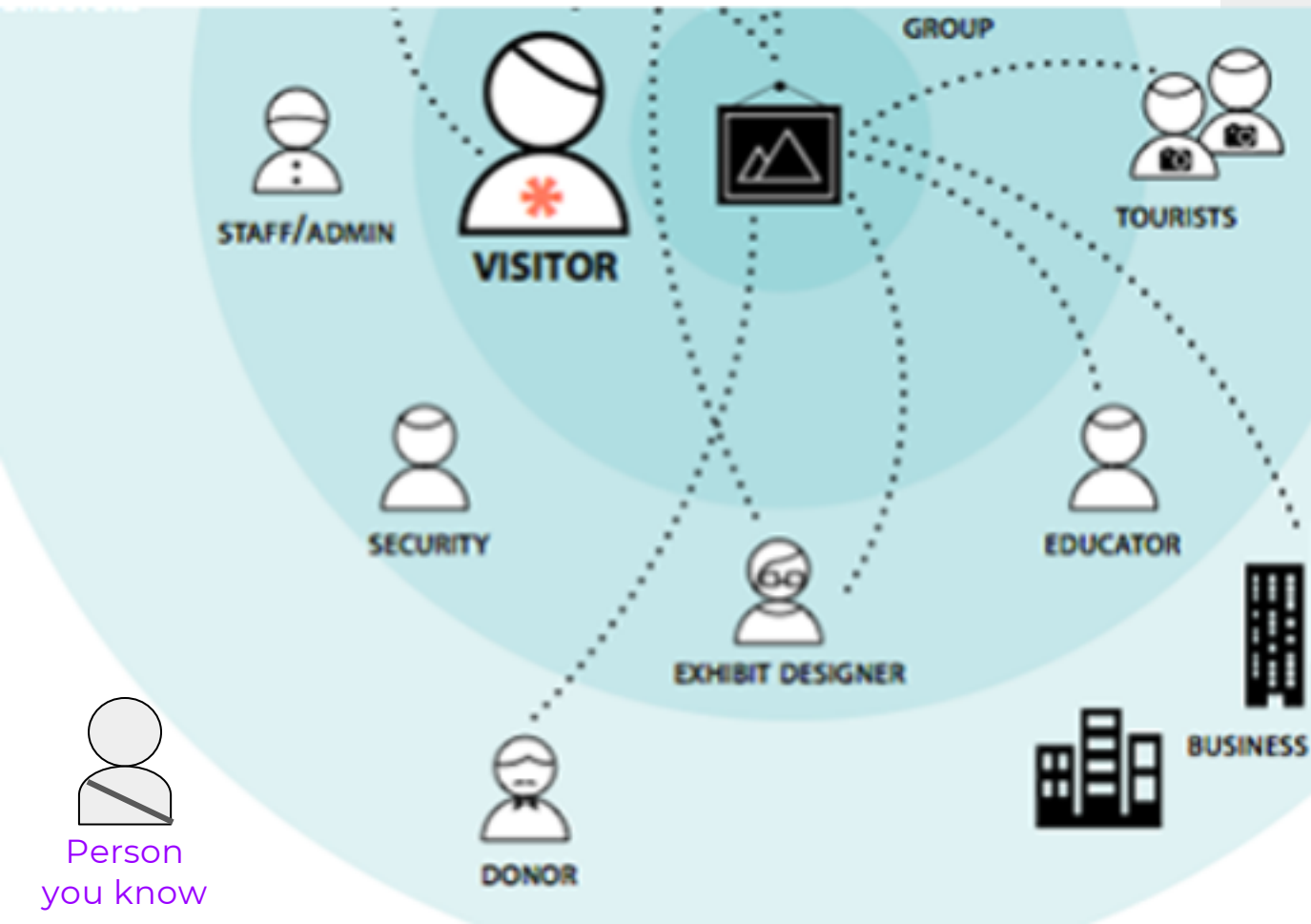


Surveys  
Questionnaires?



**NO !**

# How do you find stakeholders?



Start with people you know  
(even if they're not quite the  
right fit)

- Use the power of your current networks
- Review profiles and activity indicators
- Keep in touch with people through InMails
- Don't waste your time, don't waste their time

**Then...**

- Ask them to give you a **warm intro**-be persistent, but considerate

# How do you find stakeholders?

## Networking



Search and grow your personal network on LinkedIn

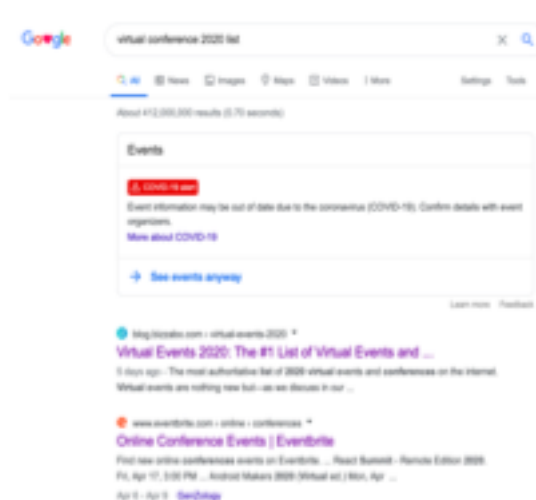
- Develop a profile and establish a personal brand
  - [Build Your Brand on LinkedIn - Bing video](#)
- Find an individual within a specific company
  - What level? Mid-Level?
  - Review current company updates and information
  - Look for groups they belong to and search groups for others
    - Search your alumni networks
- LinkedIn tips from Katy Miller, New England I-Corps Node  
<https://youtu.be/UewkdYcnTSg>

Is LinkedIn it?



# How do you find stakeholders?

## Exploring the Internet



- Keyword + title (consultant, engineer)
- Keyword + conference (power electronics conference)
- Professional and trade associations (IEEE, ACS)
- Standards, regulatory organizations (ASTM, FCC)
- Trade shows/conferences-find speakers, panelists, vendors, attendee lists
- Trade journals, magazine newsletters
- White papers/academic papers
- Industry bloggers/lobbyists
- Equipment suppliers, distributor, service experts
- Check out websites of competitors
  - Highlight satisfied customers?
  - What keywords and phrases they use?
  - What features, benefits do they mention?
  - To what groups/associations do they belong?

# How do I make contact?

- Right now, target number 2,3... ranked companies
- Target mid-level management, professionals
- Email, then call
- Cold call (research your target contact)
- Ask for 15-20 min (plan on 30-60 min)
- Play the “student” or “researcher” card
- Remind people you are looking for insights and help
- Network (ask for a warm intro)

# Getting the Interview: Warm Introductions



An introduction from someone you know



Offer to share what you've learned about technology, market or industry



Know the benefits you will bring and have both a written and verbal list of benefits ready



Rehearse



Use something you learned from your research (LinkedIn, Web, etc.) about the person to establish a connection and build rapport

# Getting the Interview:

## Email/ LinkedIn message

- Think about
  - Why is this person the right person to talk to
- Subject line: draw a personal and specific connection
  - Example: Fellow IEEE Member-  
New research opportunity
  - Example: Saw your LinkedIn profile-have info to share
- Message in the body
  - Less is more
  - Get to the point in a few sentences
  - Why is this person
  - Compliment / lean into their expertise
  - What is your connection to them / how do you know them
  - Emphasize your interest in learning / exploring
  - Avoid a sales pitch
  - Offer option A, B, not Yes or No

# Outreach Suggested Format

Brief intro to you

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How you know them / how you are connected

---

The topic you are interested in / problem you are looking to solve

---

What you want from them

---

Call to action

---

## Outreach Suggested Format

“I am a researcher from the University of Michigan”

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“William recommended that I speak with you”

---

“I am exploring new methods for predicting cardiac events.”

---

“I would love to hear your perspective on post surgical monitoring.”

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“Would you have 20-30 minutes to spare next week when we could connect over Zoom? Feel free to select a time [here](#).”

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# Getting the Interview:

## Phone

- Always leave a voicemail
  - Example: I missed you and will follow up with an email with some interesting information
- Talk to the gatekeeper – Ask for an email address or a better time to call
- Call first thing in the morning or late in the afternoon
- Never underestimate flattery
- Name dropping can work if done artfully
- Phone in conjunction with email can be very effective

# What are some suggestions for getting interviews?

- Consider being
  - direct
  - thoughtful
  - interesting
  - clear with your ask
  - succinct
  - confident
  - kind
  - conscientious (check for errors in emails)
- Refrain from
  - being too formal
  - asking people to do things on your behalf
  - **being too salesy**
  - being aggressive
  - begging

Play the U of I student card!

# Before the Interview



**Have at least one hypothesis to test**

**Know what questions can help get you there**



**Research your interview subject**



**Have a process, have a plan**

# Conducting Interviews

**Why are we talking to customers?**

- **Listening is not waiting to talk**
- Learn things you don't know
- Discover and understand
  - What is important to them
  - How "it" gets done
- Test your assumptions and hypotheses
  - Helps you stay focused

# Formulating Interview *Questions*

- What do you want to learn from the person?
- What are your incoming hypotheses that you will test?
- What is the role of person in the ecosystem?
  - user, decision maker, other?
- What is the stage of discovery and purpose?
  - Start broad, narrow in

# Problem Interviews

## Example questions

### **Pains:**

- What frustrates them?
- What are their biggest risks?
- What problems keep them up at night?
- What is getting in the way of what they want/need to do?
- What takes up the most time for the least value?
- What part of the process do they wish they could eliminate?

### **Gains:**

- What are their top goals?
- How is success measured?
- What have they tried or adopted previously that paid off?
- What trends are they seeing that they hope to be a part of?
- What is their competitor doing well that they wish they could mimic?

# Key Takeaways



Focus on current practices

Do NOT ask them to make predictions



Try to understand current trends



Ask about specific pains/gains they would like to relieve/achieve

*This is the key point of the interview!*



Try to understand the purchase process

What drives purchase decisions?  
Who influences, decides, purchases?  
What are lead times?

**Tell me a story:**

**Ask about history**

**Background**

**Experiences**

**Examples**

**Processes**

# Some questions *to get you started*

- What are the top three-to-five *jobs* you are trying to do?
- If you could improve just one job, what would it be? Why?
- What are you *currently doing* to meet objectives for that job?
- How *satisfied* are you with your current solution?
- Have you *ever considered* alternative solutions?
- *What keeps you up at night...?*
- *If you could wave a magic wand...?*

# Wrapping Up Interviews

## Good Interviews

- “Is there anything else I should have asked you about?”
- “Is there anyone else you think I should talk to you?”
- “If I have additional questions may I call you again?”

## Bad Interviews

- “Thank you very much, you’ve answered my questions”
- “I want to respect your time.”

# Problem Interviews: Example

## **Assumptions:**

1. Price is the most important factor when selecting medical supplies.

## **Interview Questions:**

1. Tell me about a time when you were reviewing a request for new supplies. What was the driving factor in your decision making process?
2. What other factors were at play at the time?
3. Who else was involved in the decision making?

# Conducting Interviews

- Introduction
  - Introduce yourself and your team
  - Thank them for taking time to meet you
- Frame the Conversation
  - Remind them why you are seeking insights and help
  - Once framed, try to get them to tell a story



## Interview Best Practices (Video/Live)

- Try to have 2 of your team present (notetaker/questioner)
- Use 1 web camera
- No recording
- Quiet location
- Headset if audio is compromised
- Dress professionally
- Thank them within a day (email...)

# In Summary

# General *Best Practices*

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- Have a “warm-up”/prelude
  - *Get to know the person*
- Ask open-ended questions
  - *Avoid yes/no or multiple choice.*
  - *Listen for unknown unknowns*
- Ask process, actions & present/past behaviors
  - *Ask who/what/why/how questions.*
  - *Avoid is/are/would/should/do you think – no opinions/speculation*
- Adopt a beginner’s mindset
  - *Listen with a “fresh pair of ears.”*
- Listen more than you talk
  - *You are there to learn.*
  - *Don’t sell.*

# General *Best Practices*

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- Get facts, not opinions
  - NOT, “Would you...?” BUT, “When is the last time you...?”
  - Focus on what they do...not what they say
- Dive deep(er)
  - Ask “why” x3 to get real motivations.
- Follow-up
  - Ask for permission to contact interviewee’s again later.
- Open doors at the end
  - Ask, “Who else should I talk to?”
  - “What else should I have asked that I didn’t?”

# Common *Pitfalls*

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- Stick to a process
  - Have a process to follow – don't just "talk to people."
  - Remove variables in conversation to allow comparison
  - Be flexible though, your interviewee knows the market better than you
- Do NOT sell...anything, ever
  - *The goal of discovery interviews is learning, not selling*
  - Don't ever ask, "Would you buy our solution?"
  - Ask, "What are your decision criteria?"
- Don't mention solutions
  - *Avoid the temptation to talk technology!*
  - *Do NOT demo.* It's not about your solution, it's about their problem.

# Common *Biases*

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- Leading the Witness
  - Walking them down the path to your solution.
  - Allow them to define their needs/wants.
- Avoid the Other 3 Biases
  - **Confirmation bias**- look for the ugly baby
  - **Sample bias**- Sample too narrow or wrong target
  - **Social bias**- go outside of your immediate network, but do leverage them for warm connections

# Common Mistakes

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- Lack a plan/process
- Execute process with excellence
- Biases

Confirmation, selection, social acceptability, winners, other?

- Perceived vs. Real Value
- Believe what is said
- Go quantitative too soon

# Additional Resources

## Customer Interview Script Generator:

- <http://customerdevlabs.com/script/>

A handful of short video clips from Steve Blank for Customer Development interviews can be found at:

- <http://vimeo.com/groups/204136/videos/page:1/sort:alphabeCcal/format:thumbnail>
- <http://startupweekend.wistia.com/projects/zt618zz0r7>

# Resources

## TALKING TO HUMANS

Success starts with understanding  
your customers

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**GIFF CONSTABLE**

with Frank Rimalovski  
illustrations by Tom Fishburne  
and foreword by Steve Blank

THE SEQUEL TO THE AWARD-WINNING BOOK TALKING TO HUMANS

## TESTING WITH HUMANS



How to use experiments to drive faster,  
more informed decision making.

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**GIFF CONSTABLE**

with Frank Rimalovski

I'VE BEEN TOLD I NEED TO GET  
CANDID, UNBIASED FEEDBACK  
ON MY STARTUP IDEA.

WE LOVE THIS  
IDEA AND WE'RE  
SO PROUD OF  
YOU, SON.



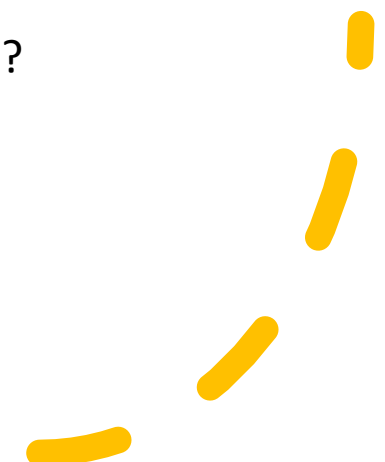
TOM  
FISH  
BURNE

*Relax, it's just a conversation.*

Practice

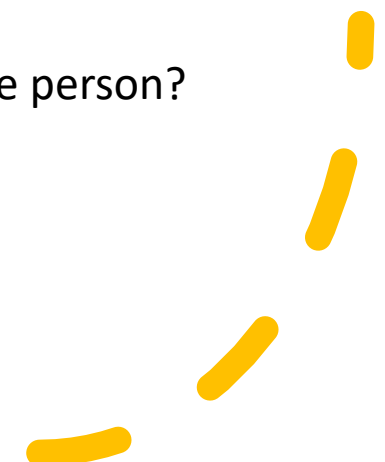
# Role Play Interview Exercise #1

- 6-minute breakout interview
- One person is the interviewer, the other is the interviewee:
  - ***Q: What was your last substantial (>\$100) voluntary purchase?***
- Pro tips:
  - ☐ Explore the economics behind the decision
  - ☐ Why this one?
  - ☐ Other alternatives considered?
  - ☐ What criteria led to this decision?
  - ☐ What was most important?




# Role Play Interview Exercise #2

- 6-minute breakout interview
- Switch roles:
  - ***Q: What is your dream location to live?***
- Pro tips:
  - ☐ Explore the social & emotional drivers behind the decision
  - ☐ Why this location? Community, job, climate, activities?
  - ☐ Other places considered?
  - ☐ What does this tell you about the person?



# Agenda

- Assignments - Past
- Customer Discovery – Primary Customer Research
- • Assignments - Midterm
- Examples
- Case Studies

A close-up photograph of a spiral-bound notebook. The notebook is open to a page with a grid of horizontal and vertical lines, resembling a graph or a ledger. The spiral binding is visible on the left side. The page has numbers like 16, 17, 18, 30, and 30 printed on it. The lighting is soft, and the focus is sharp on the spiral binding.

# Assignment #5 – Individual Assignment

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- Build a Customer Interview Plan Template
- Use the provided Customer Interview Plan Template as a guide
- Completing it as a guide for your first 2-3 team interviews
- In subsequent weeks, your team will "divide and conquer" to complete more interviews.
- At this point, use the template individually to prepare for your own personal interviews.

# Team Assignment: Critical Analysis Project in-class March 9

Each team will give an 8-10 minute (max) presentation in class on March 9.

- The presentation might cover:
  - 1. Market Validation
  - 2. Competitive Analysis
  - 3. Target Customer Segment(s)
  - 4. Key Value Prop(s)
  - 5. Business Model Canvas (focus on VP & CS) or Value Prop Canvas
  - 6. What's next? Advance, pivot, redirect, etc.
- It's a good idea to address all topics listed above, but the order and format for presenting is up to you.
- The team can break up the material or you can elect one or two individuals to deliver everything.
- You may include any additional information that you feel is relevant, such as an ecosystem map.
- There is no rubric. I'm not concerned with you completing a checklist, but instead making a case for what you feel is important to your analysis.
- You MUST be concise since timing is limited and you will be cut off if you run over.
- Time will be provided in class on March 2 to work on this project.

# Case Study; Due Mar 22, Individual Assignment

- Read the Trexel case study found in the appendix of BDN (Resources folder).
- Appendices --> B. Cases --> Trexel (PDF p.539)
- At the end of the case study, answer Question #3 (PDF p. 558): What criteria should you use to evaluate the projects at Trexel? Which project (molded structural foam, injection molding, blow molding, PVC extrusions, or meat trays and food packaging) should Bernstein recommend to the board? Why?
- Be sure to support your position. There is a strong case to be made for all options and no choice is right or wrong. I'm most concerned with your rationale supporting the application you chose, as well as why you declined the other options. 1-2 total pages should be sufficient. Due Mar 22.

# Agenda

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Good / Bad Question

Let's judge some interview questions!

## Good / Bad Question

What is the biggest issue you face dealing with activity 'x'?

## Good / Bad Question

What is the biggest issue you face dealing with activity 'x'?

**Good  
Question**

## Good / Bad Question

Would you buy a product that  
did 'X'?

## Good / Bad Question

Would you buy a product that  
did 'X'?



**Bad  
Question**

## Good / Bad Question

What are the implications of not solving problem 'X'?

# Good / Bad Question

What are the implications of not solving problem 'X'?



Good  
Question

Good / Bad Question

How do you deal with  
issue 'X' today?

Good / Bad Question

How do you deal with  
issue 'X' today?

Good  
Question

## Good / Bad Question

What solutions have you tried  
in the past?

## Good / Bad Question

What solutions have you tried  
in the past?



Good  
Question

Good / Bad Question

Would you pay \$Z for a solution  
that did 'X'?

Good / Bad Question

Would you pay \$Z for a solution  
that did 'X'?

**Bad  
Question**

Good / Bad Question

Where does the budget come from to deal with Issue 'X'?

Good / Bad Question

Where does the budget come from to deal with Issue 'X'?

Good  
Question

Good / Bad Question

What do you think about (insert sales pitch here)?

# Good / Bad Question

What do you think about  
(insert sales pitch here)?

**Bad  
Question**

**Bad  
Question**

**Bad  
Question**

Relax,  
it's just a conversation.

**BackUp**

# Interview Plan - Team 24 Budget Collector

## Open Ended Questions - likely to encourage story telling

- (1) What is your exact title at the museum?
- (2) What department do you work in?
- (3) What is your responsibilities at the museum?
- (4) What is the title and name of the person you report to?
- (5) What is the title and name of the people who report you?
- (6) Can you tell me what success would look like in your role?
- (7) Tell me about the last time you felt successful?
- (8) How does your success impact any other departments?
- (9) How did those departments react to your success?
- (10) How do other departments contribute to your success?

Customer Research, Interview Planning, and Preparation

**REQUEST FOR MEETING**

"Hello, I am cramen. I'm a describe role at the University of MN. 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 cramen. 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 to describe down conference with you?"

**INTERVIEW FOCUS**    ☐ Ecosystem/Market    ☐ Problems/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 share information about the ecosystem. Pain and gains typically relate to your initial proposition. What MYST (SOST) problems do customers have? Also, questions that relate to the ecosystem and characteristics of the market you envision playing in are good 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?

**6. GENERAL GUIDANCE**

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

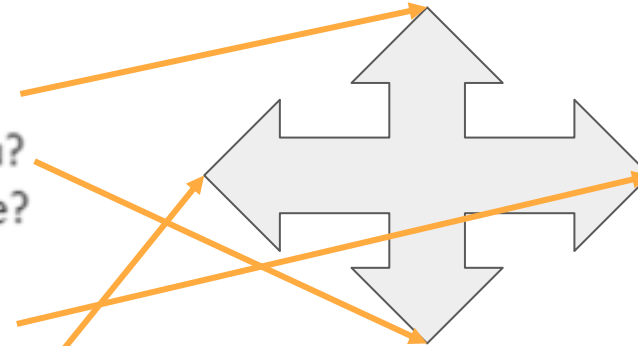
**Nailed It!**

**No question can be answered with a "Yes" or "No"**

# Interview Plan - Team 24 Budget Collector

## Nice probing around roles in the ecosystem

- (1) What is your exact title at the museum?
- (2) What department do you work in?
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Customer Research, Interview Planning, and Preparation

**REQUEST FOR MEETING**

"Hello, I am [name]. I'm a [describe role] at the University of [U.S.]. 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 to, including Zoom conference with you]?"

**INTERVIEW FOCUS** ☐ Ecosystem/Market ☐ Problems/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. Plan and guide thoughtfully using your notes prepared. When MYC/NSF presents all customers here! Also, questions that relate to the ecosystem and characteristics of the market you envision playing in are good 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?

**6. GENERAL GUIDANCE**

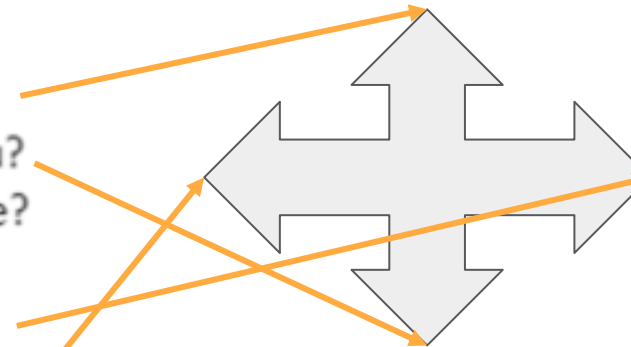
Try to get people telling stories. Ask open ended questions, such as:

**Nailed It!**

# Interview Plan - Team 24 Budget Collector

## Driving for Specificity

- (1) What is your exact title at the museum?
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Customer Research, Interview Planning, and Preparation

**REQUEST FOR MEETING**

"Hello, I am researcher. I'm a researcher 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 researcher encounter you would like?"

OR

"Hello, I am researcher. 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 researcher encounter you would like to discuss with you?"

**INTERVIEW FOCUS** ☐ Ecosystem/Market ☐ Problems/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. Plan and guide thoughtfully using the notes provided. When MYCIT (MYCIT) presents all customers here! Also, questions that relate to the ecosystem and characteristics of the market you envision playing in are good 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?

**6. GENERAL GUIDANCE**

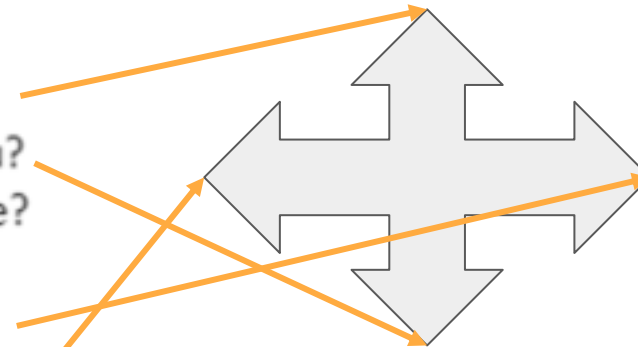
Try to get people telling stories. Ask open ended questions, such as:

**Nailed It!**

# Interview Plan - Team 24 Budget Collector

Who?

- (1) What is your exact title at the museum?
- (2) What department do you work in?
- (3) What is your responsibilities at the museum?
- (4) What is the title and name of the person you report to?
- (5) What is the title and name of the people who report you?
- (6) Can you tell me what success would look like in your role?
- (7) Tell me about the last time you felt successful?
- (8) How does your success impact any other departments?
- (9) How did those departments react to your success?
- (10) How do other departments contribute to your success?



Customer Research, Interview Planning, and Preparation

**REQUEST FOR MEETING**

"Hello, I am cramen. 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 cramen. 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 to describe Zoom conference with you?"

**INTERVIEW FOCUS** ☐ Ecosystem/Market ☐ Problems/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. Plan and guide thoughtfully rather than your initial presentation. When MYCIP (MYCIP) presents its customers here? Also, questions that relate to the ecosystem and characteristics of the market you envision playing in are good 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?

**6. GENERAL GUIDANCE**

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

**Nailed It!**  
**(and some feedback)**

#'s?, What metrics?



# Assignment Deliverables

#	Date	Interviewee Name	Title	Company	Hypothesis Tested	Questions	Interview Notes	Team Insights
1		Anthony	End User	student studying security	Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	<p><b>Question 1:</b> Think of a place where you have to provide information about yourself or your family. Which place comes to mind, and why?</p> <p><b>Question 2:</b> What sort of information are you asked to share? How do you go about sharing information with an organization, business or individual?</p> <p><b>Question 3:</b> What do you like about that process? What do you dislike about it?</p> <p><b>Question 4:</b> How do you typically file your information/records? Do you feel it's accessible? Why or why not?</p> <p><b>Question 5:</b> Do you feel like your information is readily accessible to you?</p> <p><b>Question 6:</b> Do you feel your personal information is safe on the internet?</p> <p><b>Question 7:</b> Do you know all the ways in which your data is utilized during/ after you make a purchase? What would you change about that or keep the same?</p> <p><b>Question 8:</b> Do you feel that this is a secure process? Why or why not?</p> <p><b>Question 9:</b> Who is in charge of keeping vital information and documents in your house? How comfortable do you feel with that system? Why or why not?</p>	Logical about his information storage practice, informative about what he would want out of a security system. Studies encryption and knows all about data insecurity. Would like something that was easier and more secure. Knows that everything he "puts out there" is vulnerable. Has had bank account information stolen.	He understands technology and is worried about encryption and upkeep. Thinks he would like something that was easier and more secure. Understands risk vs reward, wants convenience.
2	6/14/2021	Demetrius	End User		Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	Q1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,17,18	Has a child and his baby's mother keeps most things, but in	An average use case scenario that has a lot of things to keep track of.
3	6/14/2021	Gwen	End User	Day care owner	Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	Q1,2,3,4,5,6,7,8,9,10,11,12,14,15,16,17,18,20,21,22,23,	Gwen has a larger estate and has had to sort through the	Not super tech savvy but would pay for a service to help.
4	6/16/2021	Heather	End User	Sanitation specialist	Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	Q1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,23,24,	Seemed to not understand the value of having information	Although she doesn't explicitly fit our customer persona, she is a good example of someone who needs a solution.
6	6/13/2021	Kedisha	End User	Studying to be a nurse	Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	Q1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,	She showed a great interest in a convenient solution for dealing	As a individual in our target customer segment, she is a good example of someone who needs a solution.
7	6/12/2021	Latrelle	End User	Factory worker	Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	Q1,2,4,5,6,7,8,9,10,11,12,13,14,15,17,18,19,20,22,23,2	His is own records now but his mom kept them for a long	His baby's mother doesn't trust him with the information.
5	6/11/2021	Quentin	End User	Firefighter and car dealer	Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	Q1,2,4,5,9,10,11,12,13,14,15,17,18,19,20,22,23,24,25	Organized, meticulous, uses a filing cabinet and keeps all	Would be a high probability of use based on his needs.
8	6/4/2021	Autumn	End User	Stay at Home Mom	Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	Q1,2,4,5,6,7,8,9,10,11,12,13,15,17,18,19,22,23,24	Showed us an app where she has to download all her child's information for school. Also keeps medical records in their portals, etc. Would like it to be centralized in one place but can't figure out how to do that. Keeps the records for herself but her husband is more naturally organized and he made her pick up all her original vital docs.	Would like to be able to secure her family's information. Emotional response because it seemed like she had lost a lot of her documents. Wants everything to be accessible for her family.
9	6/4/2021	Will	End User	Ford Motor Company	Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	Q1,2,3,4,5,6,7,8,9,10,11,13,14,15,16,18,19,20,22,2	Is very organized and makes sure he has all the necessary	He would absolutely pay for a service to help him stay organized.
10	6/16/2021	Kela	End User	Accountant	Individuals want increased access to vital information, Convenience of single point data exchange, Ownership/Control data	Q1,2,3,4,5,6,7,8,9,10,11,13,14,15,16,18,19,20,21,2	Organized, meticulous, uses a filing cabinet and keeps all	As someone who works within the financial industry, she is a good example of someone who needs a solution.



# Assignment Deliverables

#	Date	Interviewee Name	Title	Company	Hypothesis Tested	Questions	Interview Notes	Team Insights	Next Steps
1	4/4/2021	Mark Johnson	Director of Operations	University of North Dakota	Flow of decisions in Organization especially for renovation	Renovation decision flow based queries as well as what is that makes you want renovations	Decision influenced by needs of students, deans and number of maintenance requests	The decision flow is convoluted and too many influencers; It is bureaucratic	Figure out the flow of decisions and its impactors
2	4/4/2021	Brian Larson	Director of Construction Management	University of North Dakota	Department has trouble justifying Renovations & importance of energy audits	Questions regarding his choice for ordering renovations and motivations and pains	He orders renovations based on operations and dispatch numbers as well as annual checks on buildings. What he wants to achieve is idealistic and yet also realistic in some degree (lower emissions and make stuff safer). Pains is the whole process is intrusive and long with too many vendors.	Rather than actual energy savings, he really would like a solution that remove obstacles in project execution	How to remove these obstacles and better help him do his job
3	4/4/2021	Museen Amoson	CEO	no energy solutions	energy audit system	ask for a veteran like him and what the customers want	images not numbers and most operations are internal. Hard to do roofs	than anything and often time just knowing people leaks are enough	and what will influence them to go for a solution like Tau Drones
4	4/11/2021	Michael Ellingson	Director Facilities Management	North Dakota State University	Need for energy audits and justification system	What is the process of enabling refurbishments and renovations	Emphasized that a study to say what is the solution to energy leaks, especially replacements to parts is important. System same as University of North Dakota for decisions	From a director's perspective, he wants to show justify renovations more than anyone due to university pressure. However state legislations need approvals for major changes. Justifications is hard to come by	Verify these results with non-university institutions
7	4/14/2021	Micael Bergeron	CFO	Ralph Engelstead Arena	Role of energy and importance of decision making to cut OPEX for large venues	Questions regarding energy usage in large venues? Decision-making for renovation	Interested in always cutting costs	The process for large stadiums more streamlined than institutions despite being affiliated to institutions. They are more interested in energy saving visuals than budget justifications	Hierarchy of decisions in large venues
8	4/14/2021	Brian Tande	Dean of Engineering	University of North Dakota	Scope of schools in improvement of buildings and overall atmosphere of state towards it	Questions about the need of technical progress in energy audits and its real-time reception. Few questions of how he uses his influence to make renovations for his in-charge buildings	Federally interested, lots of grants available now from many levels. Thus is important to go in a reap rewards is basic response	Deans play a role of influencer on Facilities Management. However not significant. Application for state and federal grants is now because of recent budgetary allocations	Research grants applicable

**Very concise and clean way of capturing insights - to the point!**  
**Note that answers to specific questions allow an inference of whether the hypothesis is true or false, new insights, inferences and hypotheses.**



# Assignment Deliverables

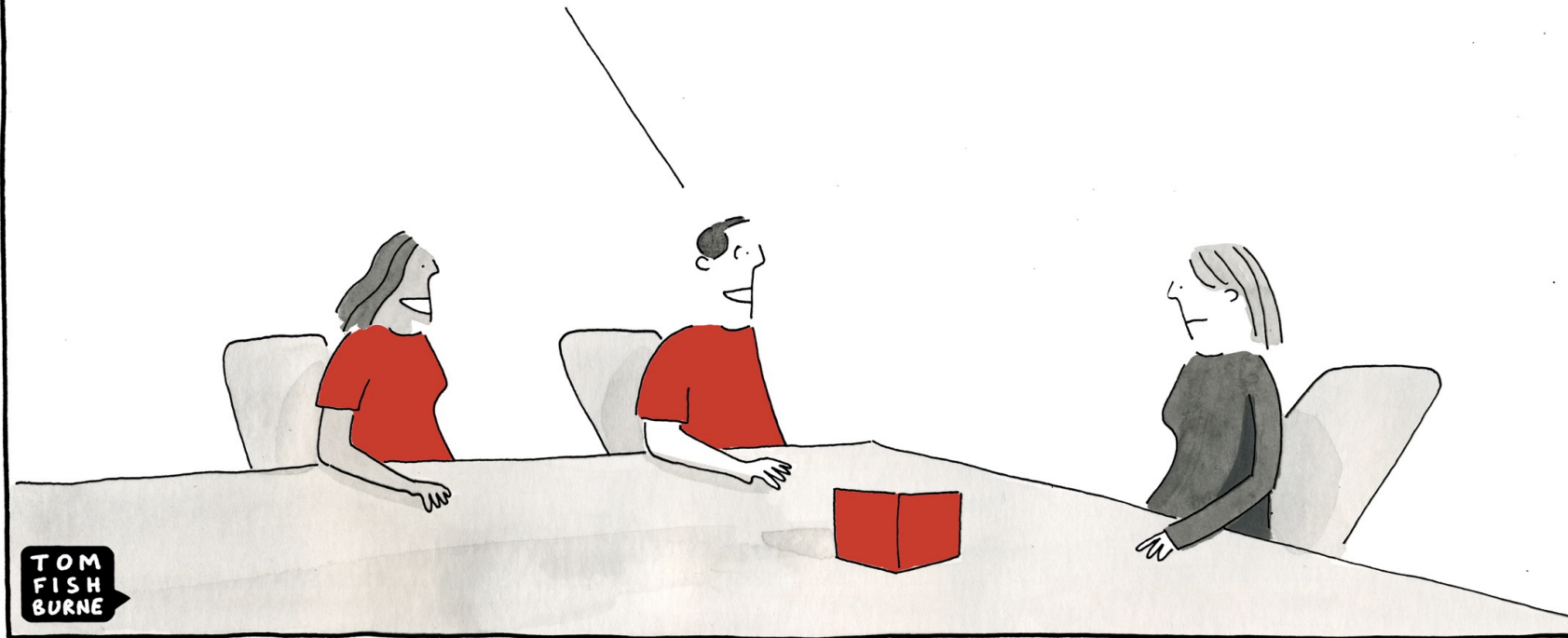
Interview Notes	Team Insights	
Her success is defined by better communication with other departments. There is not a lot of praise for her work, despite her defining her job as "the face of the museum."	If we can find a way for museum staff to be celebrated for their unique contributions this could be a possible added benefit.	New hypothesis?
Development departments are too siloed and not everyone within the department knows what's actually going on. There is not enough communication internally in the museum for her to feel capable of success. There is also not a lot of praise for her work.	If we can integrate our system into their on donor management software, they may be more likely to appreciate the data.	New hypothesis?
Uses the Argus database	They find their donors randomly or through referalls which they acknowledge leads towards less diversity in donors	Great inference!

## *How to properly set up and conduct customer discovery interviews*



*"Yes, I think I have good people skills.  
What kind of idiot question is that?"*

BE COMPLETELY HONEST AND TELL US WHAT  
YOU THINK OF THIS PRODUCT THAT WE'VE  
SLAVED OVER NIGHTS AND WEEKENDS  
WITHOUT SLEEP OR A SALARY BECAUSE WE  
THINK IT'S SUCH A COOL IDEA.



# Key Points of Blog Post (DE Blog)

1. Prepare/research
2. Visit their environment
3. Find good location
4. Write down questions
5. Recording device? “only used for reference”
6. Use opened ended questions especially early
7. Have a progression
8. Work on important questions on how to ask multiple ways – and do
9. If questions are avoided, go back and rephrase
10. Re-enact key parts
11. Positive sounds - “yes”, smiles and positive grunts
12. Positive body language
13. Do not sit with legs crossed, lean back, etc.
14. Don’t jump in too quick, allow silence to bring out more. Leave recording device on at end.
15. Bring a wing person