

Discovery Refresh





**Introduce
a new
toolkit**

Customer Discovery

*Getting and managing discussions – and distilling results – are **critical discovery skills**.*



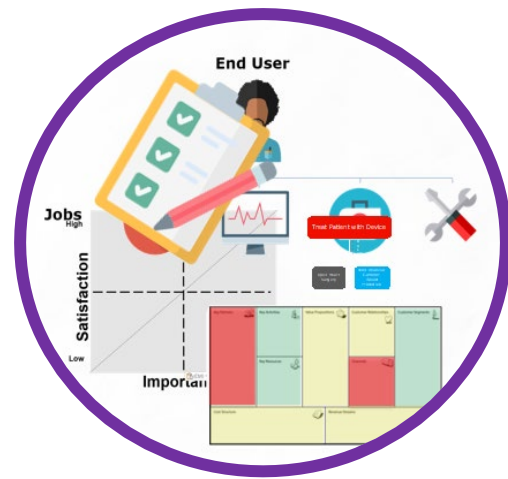
THREE SKILL SETS...



**Finding and
Landing
Conversations**



**Conducting
Conversations
And gathering data**



Data Analytics

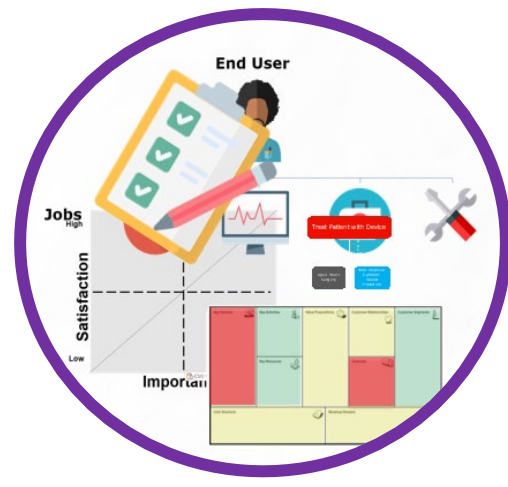
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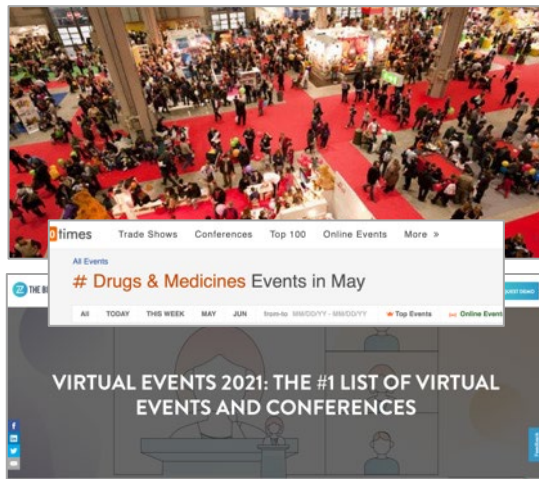


Data Analytics

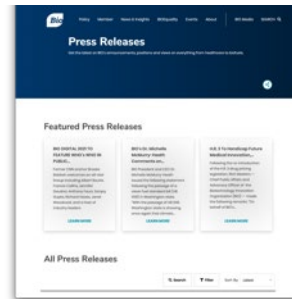




"Watering Holes"



Where do prospective customers gather?



Blog



What do they read?



Value Chain Ecosystems



How are they organized?

How have you landed
conversations?



**Have a “short story”
about...**

***why you are contacting
them!***

Establish *Credibility*

Do *NOT Sell* - Seek *Help*

Appeal to *Ego* - Put person in *Teacher Role*

Ask for *? min*

Get to *"Yes"*

Email Version #2

Subject Line: Company X requests your input

Dear Luke,

My name is Mike, I'm leading a small development team at [University X] in our material science department. We are researching a range of possible applications for the broader electronics and industrial markets. We are currently talking with active and influential professionals in the Power Tools & OPE industry to better understand the market needs and opportunities related to tool design and performance.

I was hoping you'd be willing to spend ~15 minutes with us via on-line conference sometime on Friday or Monday to share your thoughts and insights. Please advise if this would work for you or if there is another day that would be more convenient. Thank you for your consideration.

Best regards,

Mike A.

Establish *Credibility*
Appeal to *Ego*
Put person in *Teacher Role*
Seek *Help*
Do *NOT Sell*
Ask for *? min*
Get to *"Yes"*

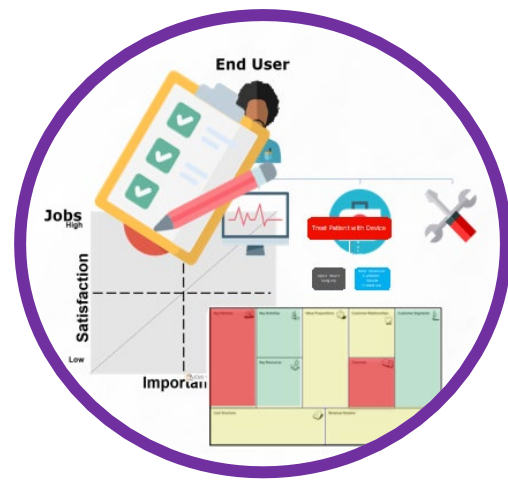
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**KEY EARLY STAGE
LEARNING GOALS**



DO YOUR CUSTOMERS HAVE THE
PROBLEM YOU THINK THEY
HAVE?

WHERE DOES THAT PROBLEM FIT
IN THEIR PRIORITIES?

ARE YOU TALKING TO THE RIGHT
PEOPLE?



North Star for interviews are your hypotheses.



Good Hypothesis Characteristics

Testable *(through customer discovery) + (can be valid OR invalid)*

Specific *(to a logical group)*

Relevant *(to your capability/business model)*

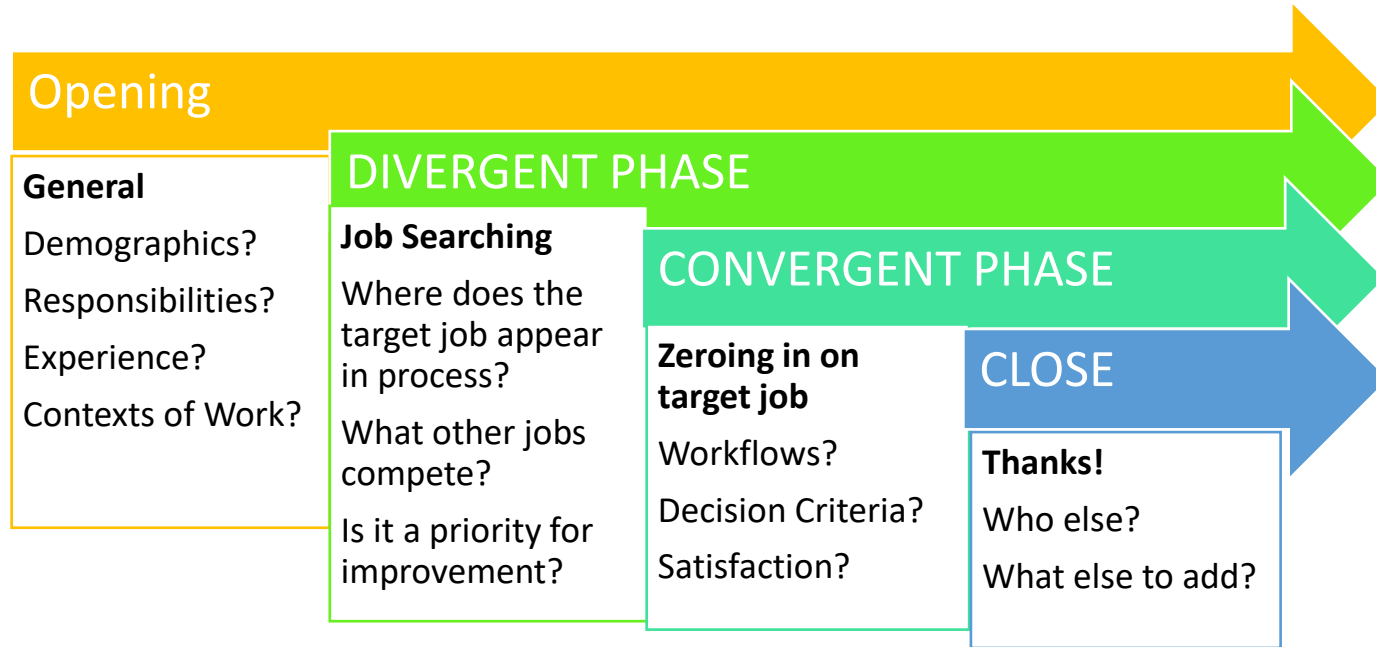
Quantifiable* *(later stage, when testing adoption)*

**Create a conversation to
help you
validate/invalidate the
hypotheses/goals**

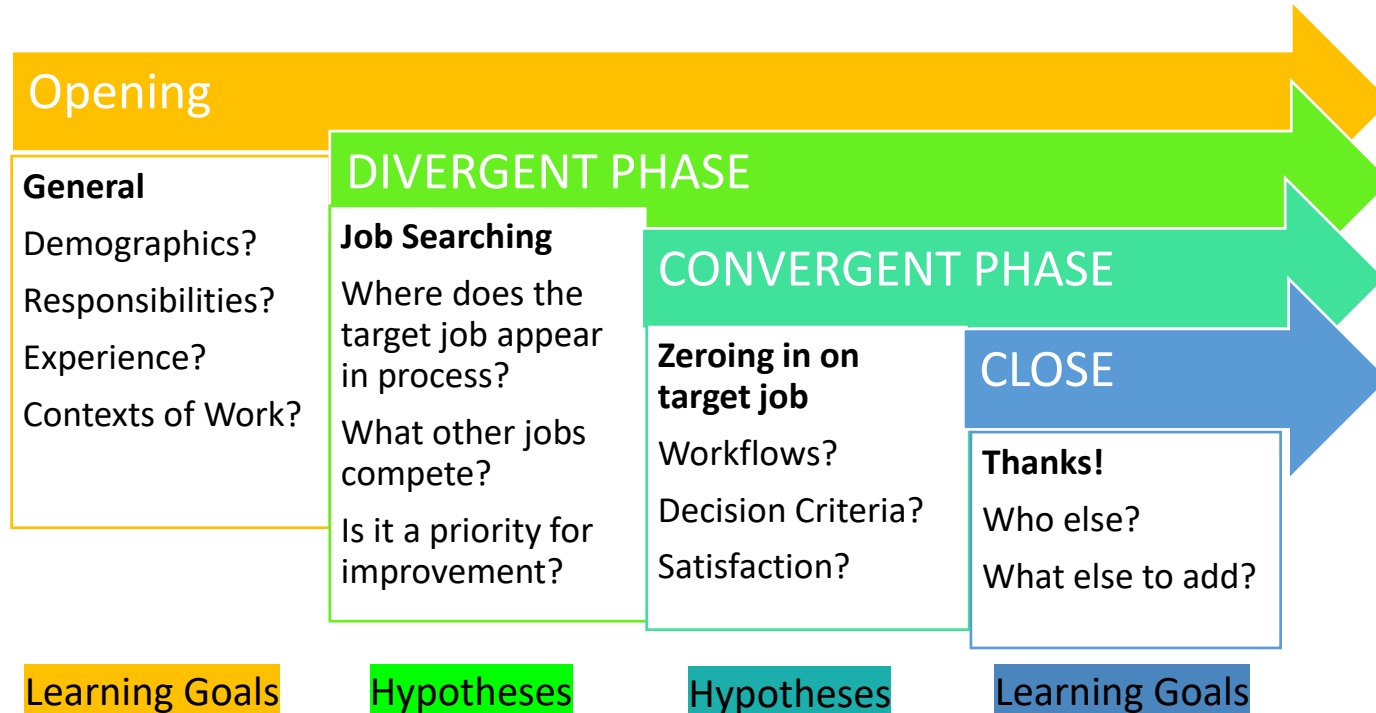
What we actually want to know...

***...will customers adopt our solution?
Why? When?***

Typical Interview Phases



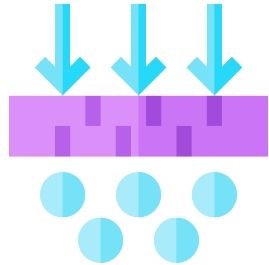
Typical Interview Phases



LEARN by *DOING!*

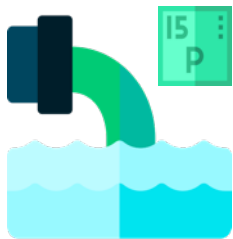
**You can *ALWAYS* get
*BETTER!***

Discovery Example



Technology is “new membrane material” that can be used for filtration.

Discovery Example



**You believe you have a better
“phosphorus” removal solution
for wastewater.**

Discovery Example



You don't know yet whether you will provide:

- (a) a complete phosphorous removal product,
- (b) a drop-in replacement filter, or
- (c) A filter material for another OEM.

STEP 1: Identifying good prospects

...for interviews.

Let's start with the *Job* someone *would hire our solution to do...*

Remove Phosphorus from wastewater

Example

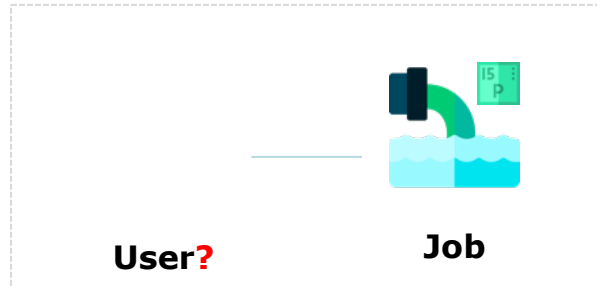


Job

Who would perform this job with our solution...

Remove Phosphorus from wastewater

Example



Let's start with the *Job* someone *would hire our solution to do...*

Remove Phosphorus from wastewater

Example



User?

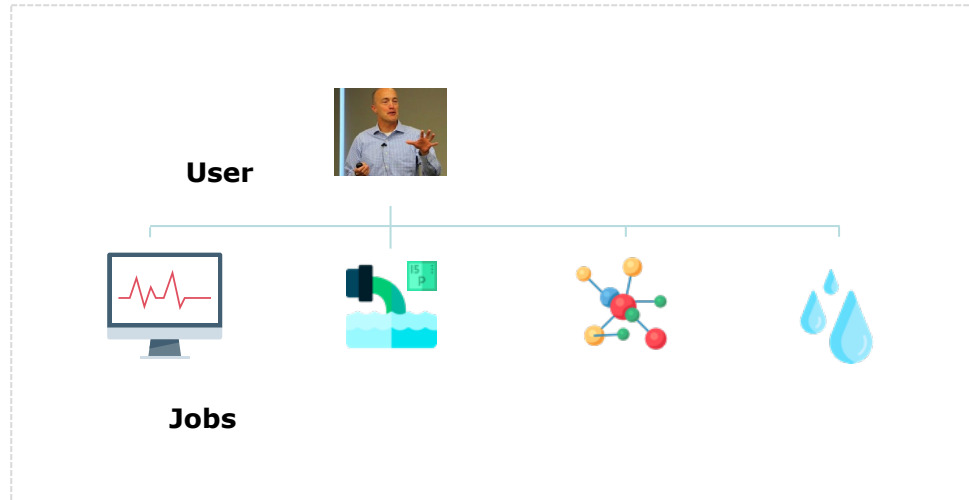


Job

STEP 2: Identify key learning objectives & hypotheses

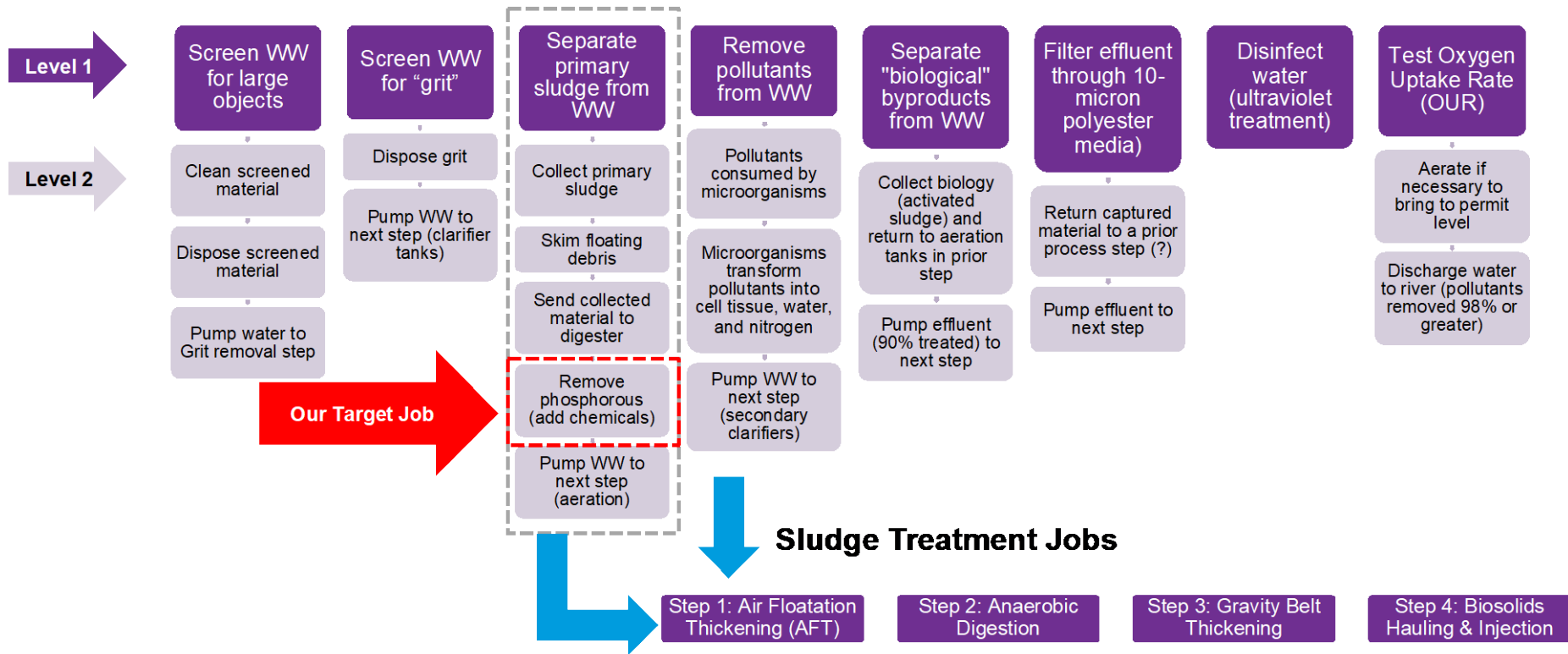
...for early Discovery interviews.

What *other jobs* compete for resources...

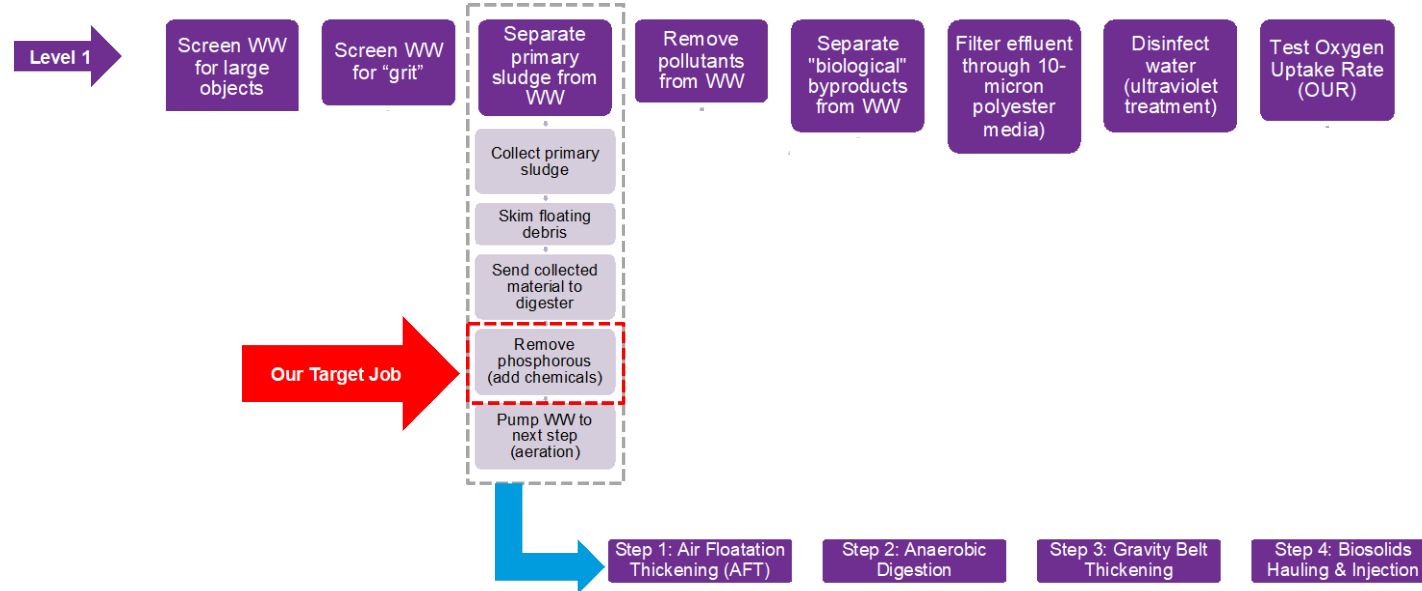


How does the customer get the job done today...

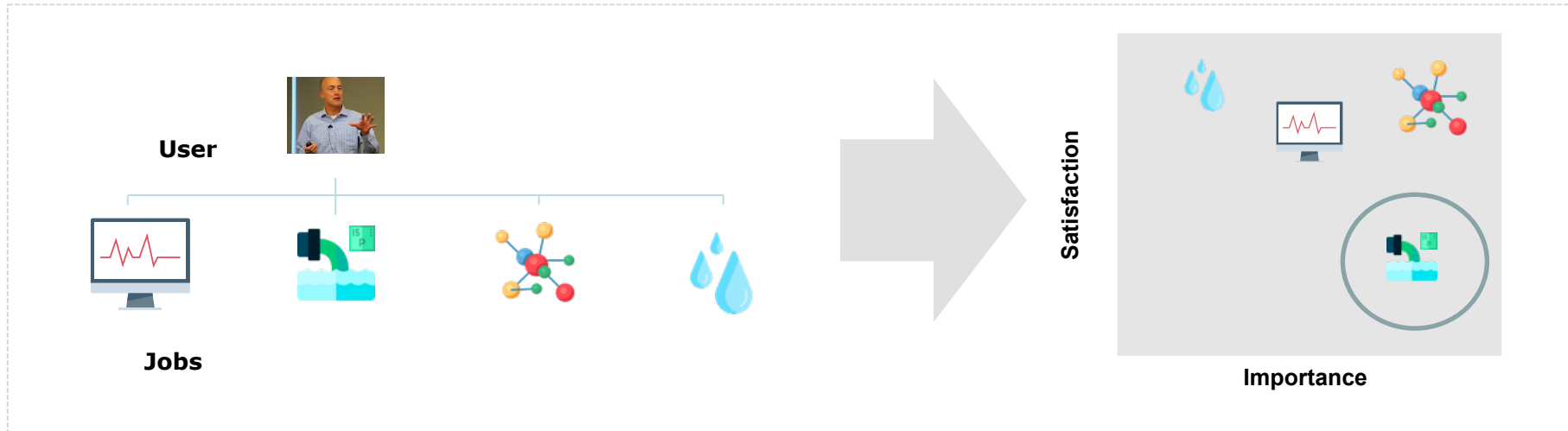




How does the customer get the job done today...



How do customers *prioritize jobs* for improvement...

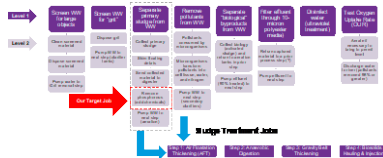


Is our target job underserved?

Your Mission



What would you like to learn from a typical Municipal Wastewater Plant Manager?



Work in breakout groups to develop questions.

Identify 1 person to ask the questions. They will come up front. (Tag Team – 5 minute conversation)

One to log key things you hear. (We will ask)

Group 4 – take note of everything.

Breakout Topics

Each team will be assigned one of following topics

1. Starting a conversation.

Key Learning goal: information that might inform segmentation – is plant or interviewee's role common or unique? What might be key attributes? First be a human. (Dallas, Itawamba, Perimeter) – National Room [Jerrid]

2. Divergent conversation.

Key Hypotheses to test: Separation of primary sludge is a key job. Plant Manager is integrally involved in separation task. Plant manager is primary decision maker for changing process. (Morris, Henry Ford, Hudson) – Suite 239 [Deanna]

3. Convergent conversation.

Key Hypotheses to test: Phosphorus Separation is key problem for that separation task/job. Decisions for new solutions will be made on filter efficiency. Plant Manager currently uses a drop-in replacement filter.
Key Learning Goal: Understanding current workflow for phosphorus separation and filter replacement. (Columbus, Coalinga, Houston) – Corcoran Room [Charleson]

4. Wrap up.

Key Learning Goals: Confirming key insights. Identifying who else might be good to speak with. (Red Rocks, Batesville, Virginia Western). – Kreeger Room [Shannon]

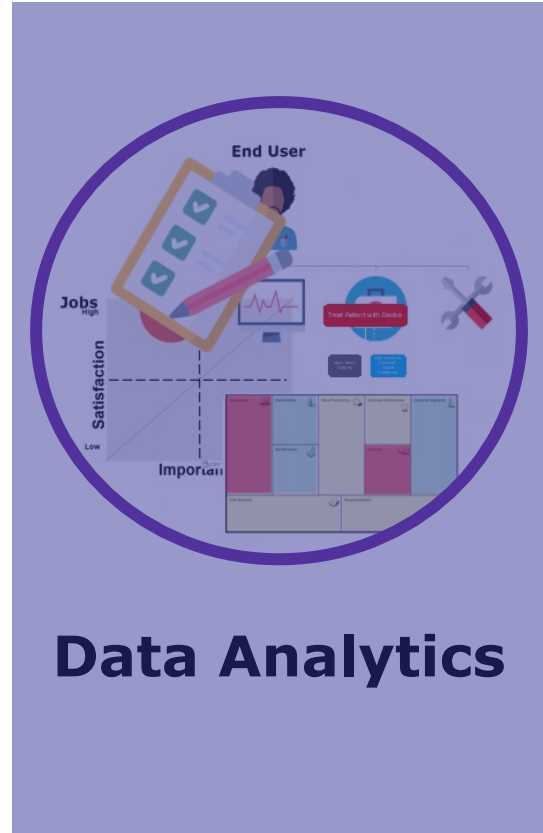
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REMEMBER: YOU ARE SIFTING FOR GOLD

THINK ABOUT HOW RESPONSES ARE IMPACTING YOUR HYPOTHESES/LEARNING GOALS

IT IS NOT ABOUT THE QUESTIONS; IT IS ABOUT THE ANSWERS

ANALYZE YOUR DATA

- What did you hear that you never heard before?
- What learning goals/assumptions did they disprove?
- What new people did they tell you about that you were unaware of?
- What will you revise/change?
- New Learning Goals/Assumptions?

Municipal Water Treatment Ecosystem

What did we learn – validate/invalidate?

Municipal Water Treatment Ecosystem

What did we learn – validate/invalidate?

What did we hear about the interviewee?

Sludge separation as key Job.

Plant Manager as key decision maker for separation solutions.

Phosphorus separation as important within sludge.

Filter efficiency is key decision criteria.

Drop-in filter is currently used.

Did we receive referrals?

What was unexpected??

Municipal Water Treatment Ecosystem

What groups did we hear about?

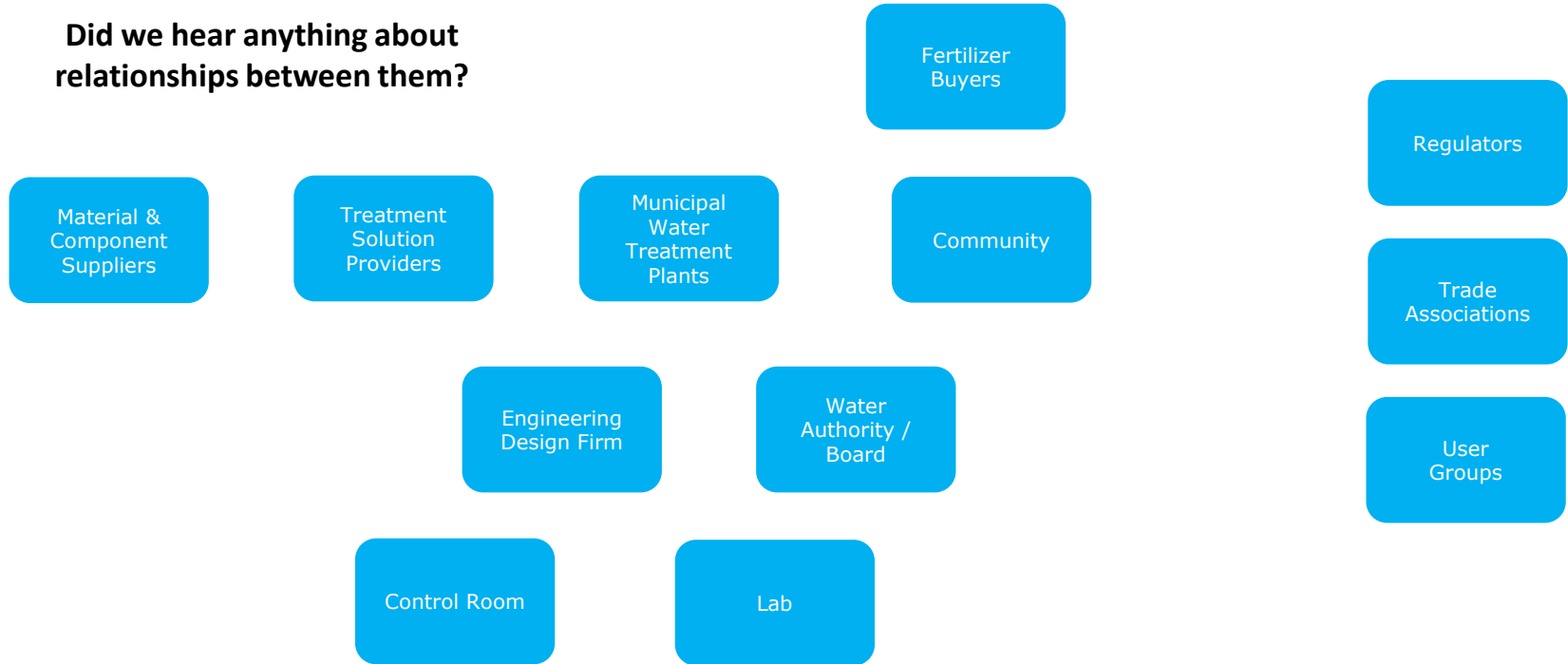
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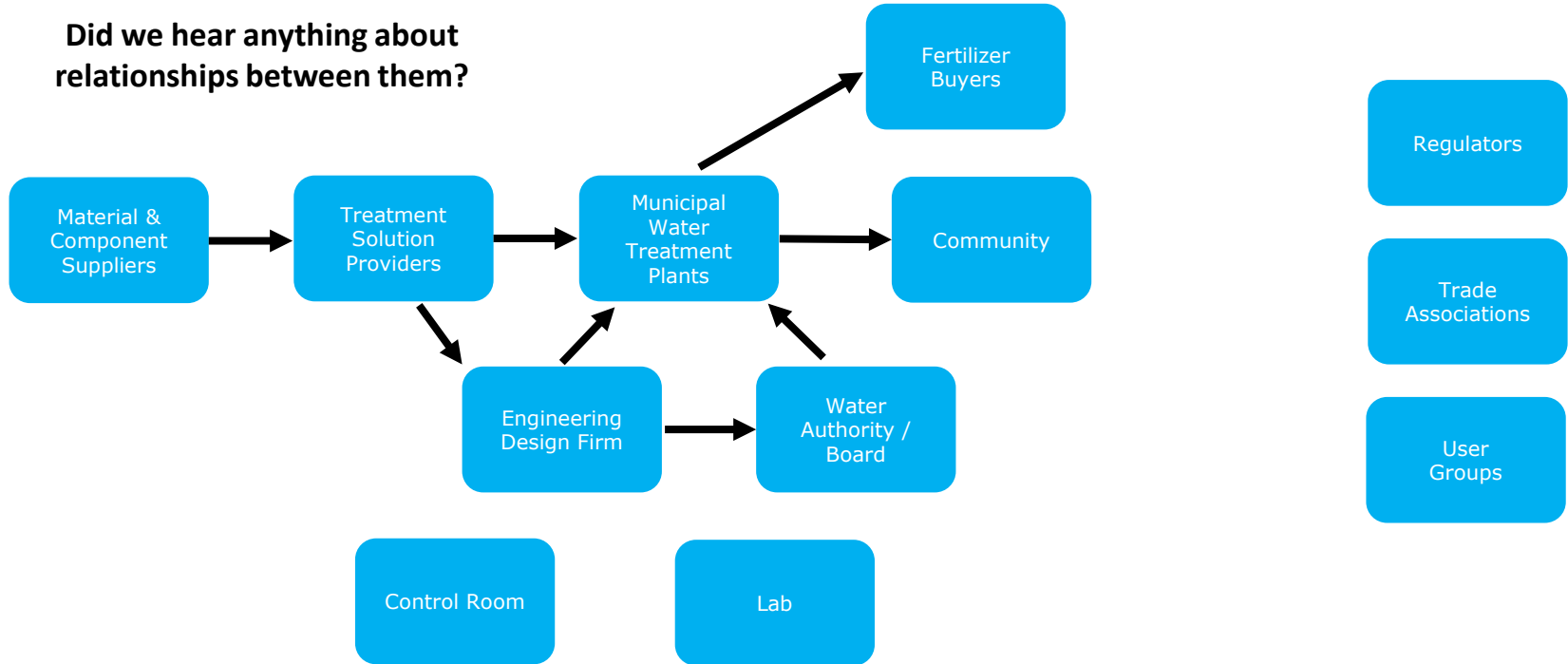
Municipal Water Treatment Ecosystem

Did we hear anything about relationships between them?

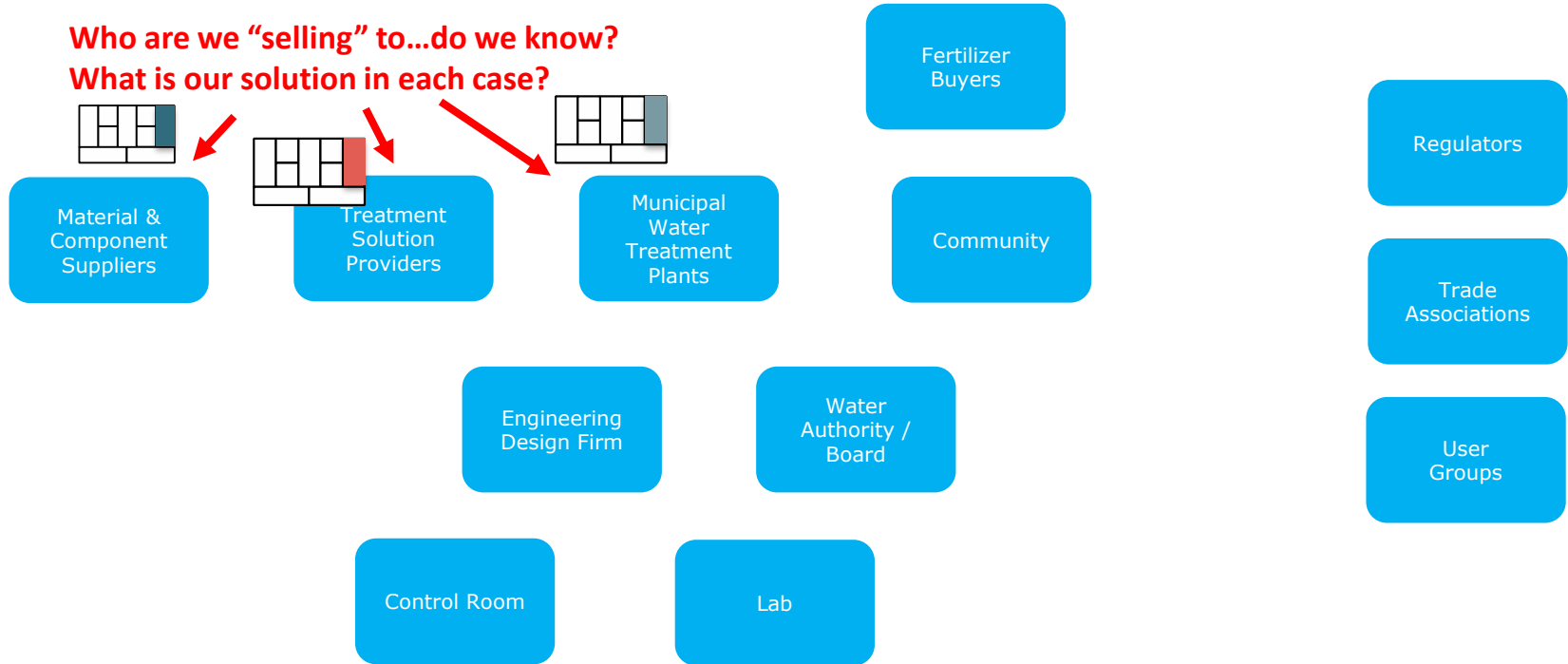


Municipal Water Treatment Ecosystem

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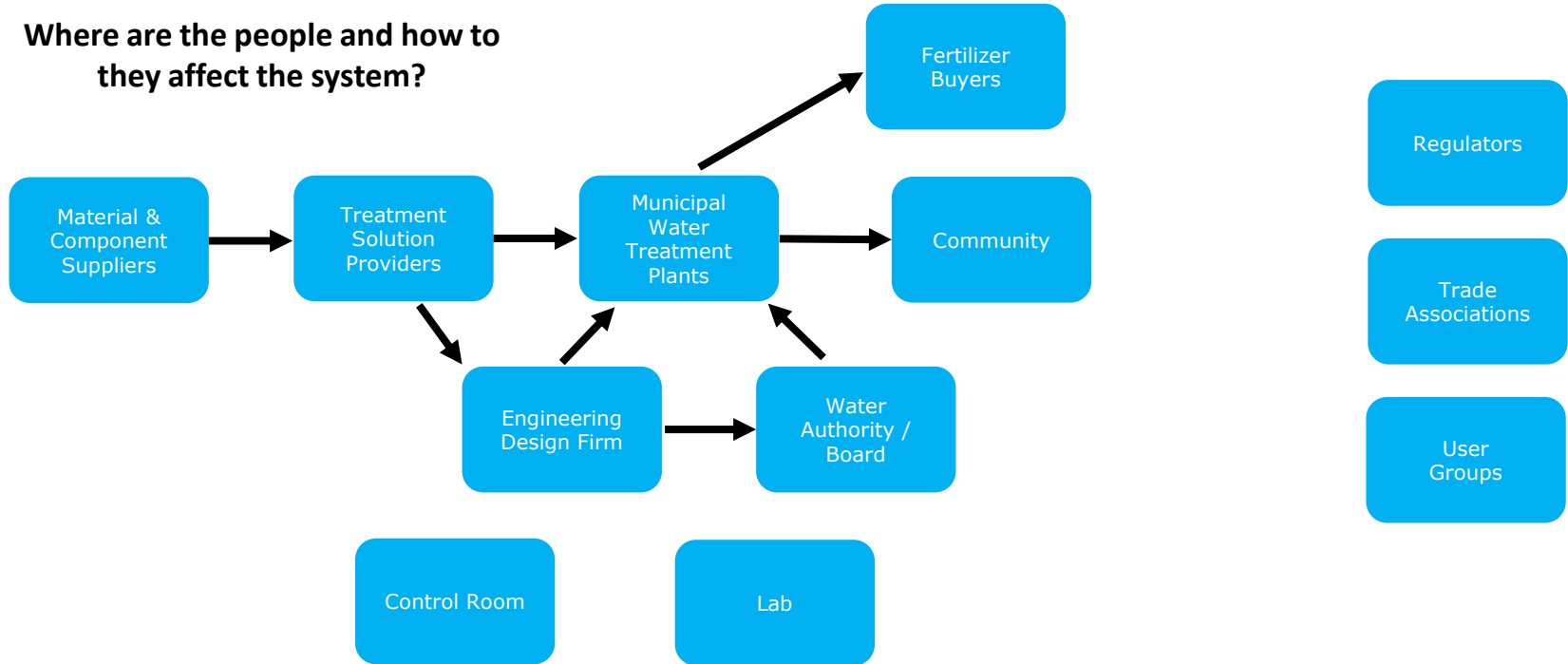


Municipal Water Treatment Ecosystem



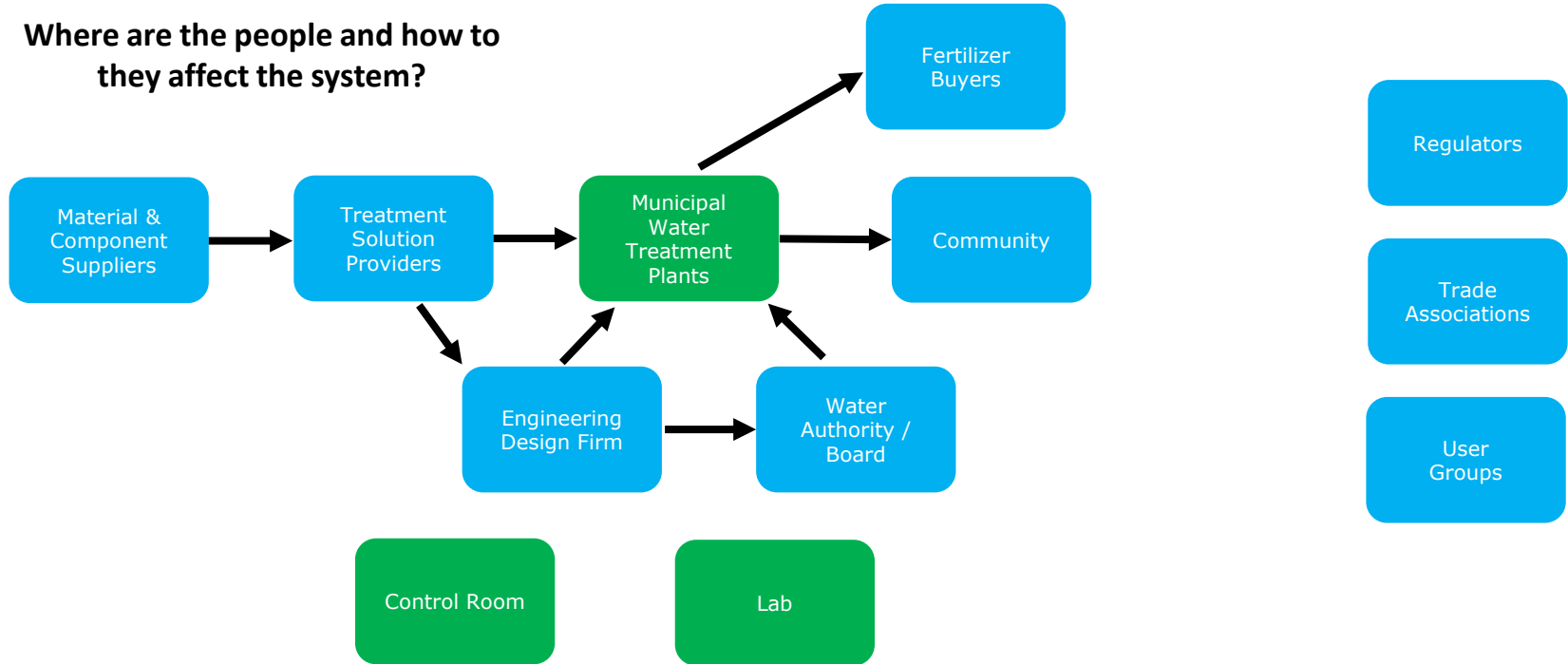
Municipal Water Treatment Ecosystem

Where are the people and how to they affect the system?



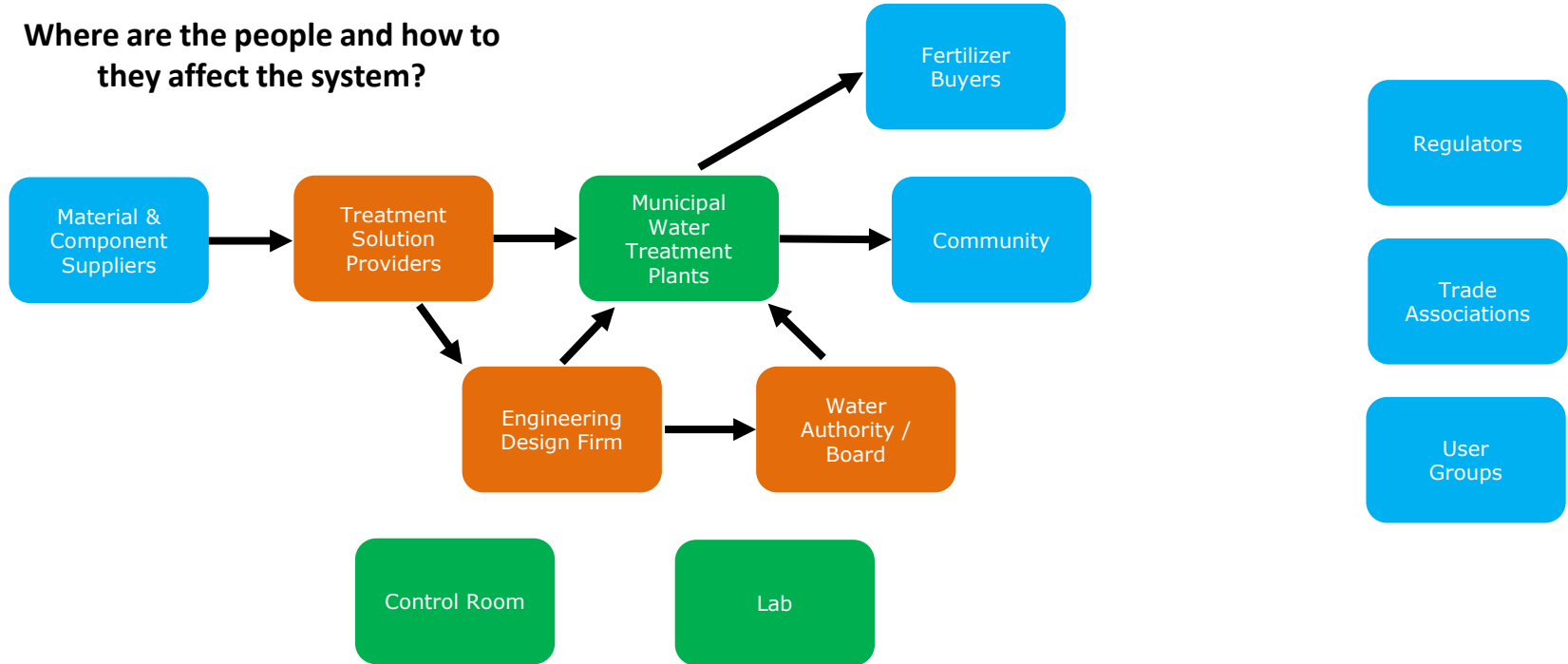
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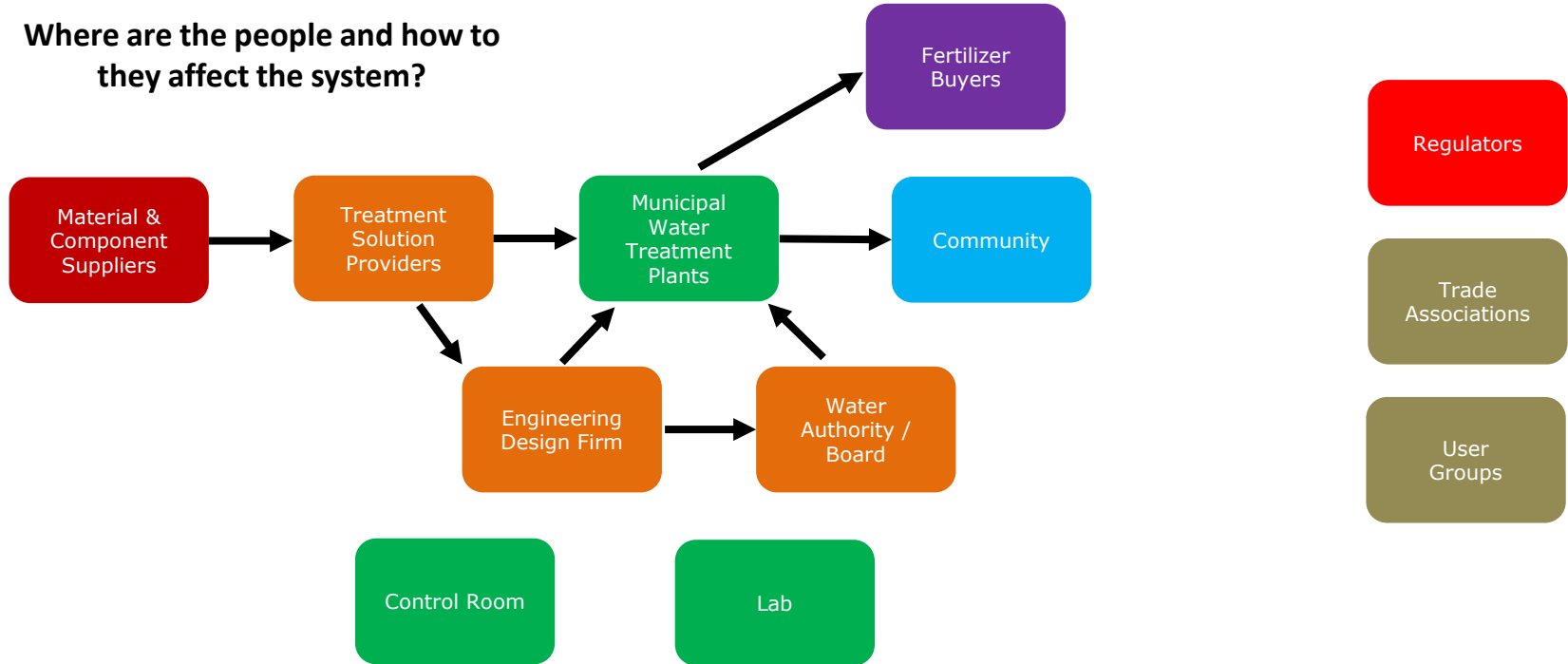
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Where are the people and how to they affect the system?



Municipal Water Treatment Ecosystem

Where are the people and how to they affect the system?



Interview Objectives*

What are you trying to learn? Do you have incoming hypotheses (guesses) to test?

1.

2.

3.

4.

5.



*Your interview objectives will depend on the role of the interviewee (User, Decision Maker, et al) and phase of discovery.

Final Thoughts...

In person is always better – observations!

Take two people if possible (*one takes notes*)

Listen more than you talk

Differentiate between *FACT* and *OPINIONS*

Dive deep – ask the *Killer Question*

You have *nothing to sell* – so don't try

Avoid talking about your solution

DOCUMENT quickly and completely