**PMR Worksheets (3):**

**The Primary Market Research Pledge**

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**Pledge to Serve the Interests of the Customer**

I do hereby solemnly swear to follow the lead of potential customers in the pursuit of a product and/or service while starting and building my startup.

I recognize that I am subject to confirmation bias, and as such will approach primary market research as an opportunity to question assumptions and to search for different alternatives.

I understand that it is not a sign of weakness, lack of intellect, or other shortcoming to modify or completely change the idea with which I started. In fact, I acknowledge that failing to make adjustments is a likely sign of such shortcomings, as consistency comes in second when searching for the truth.

This does not mean it is the customer’s job to design the product, because that job is mine. But I will seek to honestly understand the customer’s needs, wants, pain points, pressures, opportunities and much more to design a solution that will create great value for her and minimize any friction it takes for her to adopt it.

Print name: Chrysis Andreou



Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_10/03/2025\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Primary Market Research Worksheet I: Preparation**  **(Make a new copy of this worksheet for each market segment you analyze)** | | | | |
| I. | **Secondary Market Research Sources and Key Lessons Learned:**  A. Academic Journal Articles & Conference Proceedings  - Key Lessons: Many top-tier journals and conferences note that researchers face time-intensive literature reviews and data synthesis. Tools that expedite these tasks can enhance publication speed and research impact.  B. Industry White Papers and University IT Reports  - Key Lessons: Emerging digital platforms are increasingly being adopted in academia. However, integration with existing academic databases and reference management tools is crucial to gain researcher trust.  C. Surveys from Academic Consortia & Research Networks  - Key Lessons: There is a consistent need for cost-effective, user-friendly AI solutions that can adapt to diverse research workflows; researchers value flexibility and human oversight even in automated processes. | | | |
| II. | **What are the profile(s) of the people you want to engage with?** (e.g., description of end user, economic buyer, champion, industry analysts, influencers; description should be enough to help you identify, find & deselect potential candidates. Can include demographics & psychographics – see Step #3 for more info)  A. 1st Targeted Profile Name: Lead Researcher/Professor  Description: Senior academic professionals leading labs or departments. They are experienced in research, face intense publication pressure, and influence departmental purchasing and tool adoption.  B. 2nd Targeted Profile Name: Postdoctoral Researcher  Description: Early-career scientists deeply involved in day-to-day research activities and literature reviews, often tech-savvy and eager for tools that improve efficiency.  C. 3rd Targeted Profile Name: Graduate Student  Description: Active contributors to research projects, juggling coursework and experiments; they value solutions that help streamline research tasks and enhance learning.  D. 4th Targeted Profile Name: Department Chair  Description: Administrative leaders overseeing research priorities and budget allocations; interested in scalable solutions that benefit the entire department.  E. 5th Targeted Profile Name: Research Lab Manager  Description: Operational coordinators managing resources, equipment, and research support systems; focus on ensuring tools integrate smoothly with existing infrastructure. | | | |
| III. | **Your General Recruitment Script (be clear on who you are, why you want to engage, what you are asking for):**  Hello, my name is Chrysis Andreou and I’m working on an AI-driven platform designed specifically to accelerate and enhance scientific research in academic settings. Our solution integrates multi-agent reasoning and reinforcement learning to streamline literature reviews, support hypothesis generation, and expedite experimental workflows—all while preserving critical human oversight. I’d love to hear about your current research challenges and discuss how such a tool might improve your day-to-day operations. Could we schedule a brief conversation to get your valuable feedback? | | | |
| IV. | **Initial Candidate List to Contact** | | | |
|  | Name & Contact Info | Profile Type | Source | Why You Want to Engage with this Person plus Any Other Info to Build Rapport |
|  | Dr. Emily Carter – emily@uni.edu | Lead Researcher/Professor | University website; Conference speaker | Recognized for pioneering research in computational methods; influential in tech adoption in academia. |
|  | Dr. Michael Lee – mlee@techinst.edu | Postdoctoral Researcher | Lab newsletter; LinkedIn | Actively publishes in high-impact journals and frequently discusses workflow improvements in research. |
|  | Sarah Nguyen – snguyen@gradmail.edu | Graduate Student | Departmental forum; Academic advisor referral | Passionate about integrating digital tools in research; provides a fresh perspective on user needs. |
|  | Prof. David Kim – dkim@stateuni.edu | Department Chair | University directory; Industry panelist | Oversees departmental budgeting and tech upgrades; interested in scalable, cost-effective research tools. |
|  | Linda Rodriguez – lrodriguez@lab.org | Research Lab Manager | Networking event | Manages lab operations and procurement; seeks efficient tools that integrate with existing research systems. |

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| **Primary Market Research Worksheet II: Execution**  **(Make a new copy of this worksheet for each market segment you analyze)** | | | |
| **I.** | **Which profile are you engaging with:** Lead Researcher/Professor (Dr. Emily Carter)  **How well does this person fit the profile:**  Dr. Carter is a well-established professor with extensive research experience, leading a multi-disciplinary team and regularly publishing in top-tier journals. She also influences technology decisions in her department.  **Type of engagement (e.g., interview, observation, test, immersion, other):** One-on-one in-depth interview (via video call). | | |
| **II.** | **Your General Script/Framework for Engagement (Guidance: Open-Ended 🡺 Qualitative insights/hypotheses 🡺 (if appropriate) Quantitative insights/hypotheses and data) (approximately 5 key items):**  A. Introduction:  - Briefly introduce myself and explain the purpose of the interview.  - Outline the mission of the AI platform aimed at accelerating research.  B. Understanding the Current Workflow:  - Ask about the current process for literature review, hypothesis generation, and experiment planning.  - Explore challenges related to time, resource allocation, and integration with existing tools.  C. Exploring Pain Points & Opportunities:  - Probe into specific frustrations with manual processes and identify areas where AI could add value.  - Inquire about any past attempts to adopt digital tools and the outcomes.  D. Discussing the Proposed AI Solution:  - Present an overview of the multi-agent and RL framework, emphasizing human oversight.  - Seek feedback on the potential benefits and any reservations they might have.  E. Closing and Next Steps:  - Summarize the key points discussed and ask for any additional insights.  - Request referrals to other potential candidates and gauge interest in follow-up engagements. | | |
| **III.** | **What did you learn?**  The interview revealed that academic researchers, like Dr. Carter, are burdened by time-consuming literature reviews and data synthesis. There is strong interest in AI solutions that can reduce manual workload while still allowing human oversight. The need for seamless integration with existing academic databases and reference management tools was emphasized. Additionally, cost-effectiveness and adaptability to different research workflows emerged as key priorities. | | |
| **IV.** | **What surprised you?**  It was surprising to learn the extent to which researchers are cautious about fully autonomous systems. Despite the enthusiasm for AI, there is a pronounced preference for a hybrid model that preserves human judgment. Moreover, Dr. Carter’s emphasis on the importance of interoperability with current academic infrastructures was more critical than initially anticipated. | | |
| **V.** | **Which hypotheses did you seem to confirm? How and why?**  **-** Hypothesis 1: Researchers face significant delays in manual literature reviews and hypothesis formulation.  Confirmed by Dr. Carter’s detailed description of her team’s struggles with information overload and inefficient processes.  - Hypothesis 2: There is a strong demand for tools that integrate seamlessly with academic databases.  Confirmed as the researcher stressed the need for a system that works alongside current reference management and data sources. | | |
| **VI.** | **Which hypotheses did you seem to invalidate? How and why?**  - Hypothesis: Researchers would adopt a fully autonomous system without human intervention.  Invalidated because Dr. Carter clearly articulated that while automation is welcome, a human-in-the-loop approach is essential for trust and validation in research outcomes. | | |
| **VII.** | **Which hypotheses were you unable to reach conclusions on? Why?**  **-** Hypothesis: The exact budget allocation for new digital tools in academic departments.  The conversation did not yield specific financial figures as budget decisions vary greatly by institution and are influenced by external funding cycles. | | |
| **VIII.** | **What new questions were raised in this engagement?**  - How can the platform be tailored to integrate with diverse academic databases (e.g., PubMed, arXiv, institutional repositories)?  - What are the key features that would most effectively support collaborative research across multi-disciplinary teams?  - How might pricing models be structured to accommodate the varying budget constraints of different academic institutions? | | |
| **IV.** | **Additional Future Candidates List Obtained from Current Candidate** | | |
|  | Name & Contact Info | Profile Type | Why does the current candidate think we should engage with this person, plus any other info to build rapport |
|  | Dr. Rachel Adams – radams@uni.edu | Postdoctoral Researcher | Recommended for her active role in adopting tech innovations in her lab and her recent publication on digital research tools. |
|  | Mr. Brian Thompson – bthompson@lab.org | Research Lab Manager | Known for his expertise in streamlining lab operations and integrating new technologies into existing workflows. |
|  | Dr. Sophie Lin – slin@stateuni.edu | Graduate Student | Suggested as a rising star in research who is eager to experiment with new digital solutions and provide fresh insights. |
| **V.** | **What changes should I make for the next primary market research engagement?** | | |
|  | **Profile Changes:** - Expand outreach to include more junior researchers (postdocs and graduate students) who may be more open to adopting innovative tools. | | |
|  | **Qualitative Insights/Hypotheses Updated (could be more or less than 3):**  A. Greater emphasis on seamless integration with existing academic IT systems is crucial.  B. Budget constraints and funding cycles are more significant than initially thought.  C. Collaborative features that support multi-user environments are highly desirable. | | |
|  | **Quantitative Insights/Hypotheses Updated (Optional – only if appropriate & you are far enough along) (could be more or less than 3):**  A. Explore specific adoption rate metrics if a pilot or free trial is offered.  B. Assess the potential cost savings or time reductions the tool can deliver. | | |
|  | **Script Update:**  A. Refine the introduction to quickly establish credibility by referencing successful pilot results or testimonials.  B. Incorporate specific questions regarding integration challenges with existing academic tools.  C. Streamline the conversation to respect the tight schedules of busy academics.  D. Prepare a brief demo or visual aid to illustrate key features during the interview. | | |
| **VI.** | **Headline for this Engagement:**  "Academic Researchers Demand Integrated, Cost-Effective AI Solutions to Overcome Manual Workflow Bottlenecks" | | |