Step 9 (Identify Your Next 10 Customers) Worksheets (3):

Worksheet #1: Summary of Next 10 Customers

Summary of Next 10 Customers

	General Info				Fit					Engagement		
#	Customer Name	Relevant Info	Title	Email/ Phone	Demo-graphic	Psycho-graphic	Use Case	Value Prop	Overall	Contacted	Level of Interest – Letter of Intent?	Source
1	**Dr. Lena Petrova**	Focused on multi-agent RL systems, published in NeurIPS	Postdoctoral Researcher	l.petrova@mit.edu	30s, Cambridge MA (USA), PhD	Early adopter, seeks efficiency, values cutting-edge tools	Optimize training parameters for complex multi-agent simulations	Reduce simulation setup time by 40%, improve convergence speed	High	Yes	High	Conference Paper Author
2	**Prof. Kenji Tanaka**	Heads large bioinformatics lab, expert in AI for drug discovery	Professor	k.tanaka@bio.u-tokyo.ac.jp	50s, Tokyo (Japan), PhD	Results-driven, established, seeks impactful research acceleration	Generate novel hypotheses for drug repurposing based on genomic data	Increase identification rate of viable drug candidates by 25%	High	Yes	High	University Faculty Directory
3	**Maria García**	Working on thesis using CV for medical image analysis	PhD Candidate	maria.garcia@inf.ethz.ch	20s, Zurich (Switzerland), MSc Student	Detail-oriented, collaborative, needs robust analysis tools	Automate feature extraction and comparison across large medical image datasets	Improve consistency of analysis, reduce manual review time by 60%	High	Yes	High	Research Lab Website
4	**Dr. Samuel Jones**	Investigates algorithmic bias and fairness in AI models	Associate Professor, AI Ethics	sam.jones@cs.stanford.edu	40s, Stanford CA (USA), PhD	Values transparency, seeks rigorous methods for ethical AI	Benchmark fairness and robustness metrics across various model architectures	Identify potential biases earlier in development cycle, ensure compliance	Medium-High	Yes	High	AI Ethics Conference Speaker
5	**Dr. Ingrid Hoffmann**	Leads group focused on autonomous systems & robotic learning	Research Group Leader	hoffmann@is.mpg.de	40s, Tübingen (Germany), PhD	Innovative, seeks automation for complex experiments, application-focused	Plan sequences of robotic experiments and automate sensor data analysis	Accelerate development cycle for autonomous navigation algorithms by 30%	High	Yes	High	Max Planck Institute Website
6	**Chen Wei**	Researching generative models for scientific writing	PhD Student	chen.wei@nlp.tsinghua.edu.cn	20s, Beijing (China), MSc Student	Tech-savvy, seeks productivity tools, values open-source principles	Assist in drafting literature review sections by summarizing	Reduce time spent on literature synthesis for publications by 50%	High	Yes	High	Academic Collaboration Network

							relevant papers					
7	**Prof. David Levy**	Foundational research in causality and AI reasoning	Professor	d.levy@cl.cam.ac.uk	60s, Cambridge (UK), PhD	Theoretical focus, values logical rigor, seeks novel insights	Formulate and test causal hypotheses using observational research data	Explore complex causal relationships not easily testable manually	Medium-High	Yes	High	Known Expert Publication
8	**Dr. Fatima Rossi**	Applying ML/AI in a fast-paced biotech startup environment	Head of AI Research	f.rossi@genomecure.com	30s, Boston MA (USA), PhD	Entrepreneurial, deadline-driven, needs quick, reliable results	Integrate multi- modal genomic and clinical data for biomarker discovery	Accelerate identification of promising biomarkers for clinical trials	High	Yes	High	Biotech Industry Event Attendee
9	**Dr. Ben Carter**	Modeling climate change impacts using AI	Postdoctoral Fellow, Climate Science	ben.carter@unimelb.edu.au	30s, Melbourne (Australia), PhD	Mission-driven, data-intensive work, needs powerful simulation tools	Run and benchmark complex climate model simulations more efficiently	Improve accuracy of climate projections, reduce computational overhead	High	Yes	High	University Research Portal
10	**Dr. Anya Sharma**	Leads NLP research team at major tech firm, focus on LLMs	Principal Research Scientist	a.sharma@techcorp-research.com	40s, Seattle WA (USA), PhD	Industry-focused, values scalability & practical application, efficiency-driven	Streamline development & benchmarking of large language models for specific tasks	Reduce LLM experimentation cycles by 35%, improve task-specific performance	High	Yes	High	Corporate Research Website

Note -1: Like with other worksheets, this is meant to give some structure but it can and should be customized as appropriate for your situation

Note – 2: Relevant Info is other relevant info that is not captured elsewhere, such as "Total Megawatts Installed" for the Methane Capture example from Disciplined Entrepreneurship*.*

Worksheet #2: Notes From Conversation With Potential End User 1 (Dr. Lena Petrova)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Female, 30s, PhD, Postdoctoral Researcher at MIT, Cambridge MA (USA). Income typical for postdoc role.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Early adopter of new tech, highly values efficiency and cutting-edge tools. Driven by advancing multi-agent RL systems. Frustrated by tedious parameter tuning. Seeks tools that accelerate discovery.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses Python ML libraries (PyTorch/TensorFlow), simulation environments (e.g., MuJoCo, PettingZoo), experiment tracking tools (e.g., Weights & Biases), collaboration tools (Slack, GitHub). Values W&B most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	NeurIPS, ICML, ICLR conferences (High intensity), MIT CSAIL seminars (High), RL research forums/mailing lists (Medium), Twitter/X (AI research circles) (Medium).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Starts day reviewing simulation results. Spends significant time coding/debugging RL algorithms, setting up complex simulations, analyzing data. Attends lab meetings, reads papers. Thinks about optimizing training, finding novel approaches, getting next paper published.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Publish high-impact RL research: Weighting: 40% 2. Improve efficiency of simulation/experimentation: Weighting: 30% 3. Collaborate effectively with colleagues: Weighting: 15% 4. Stay current with latest RL advancements: Weighting: 10% 5. Secure future research funding/position: Weighting: 5%

Feedback on Full Life Cycle Use Case	Resonated strongly with the pain points of current manual setup. Appreciated the vision of an integrated workflow from ideation to results. Questioned integration ease with existing simulation tools.
Feedback on High Level Product Specification	Intrigued by the multi-agent architecture and Manager Agent concept. Liked the modularity. Asked about customizability of agents for specific RL environments. Visual dashboard seemed intuitive.
Feedback on Quantified Value Proposition	Found the 40% reduction in setup time highly compelling. Asked for validation/case studies supporting the convergence speed improvement claim. Value proposition aligns with key priorities.
General thoughts/conclusions/questions the end user has	Expressed strong interest ("High"). Sees potential to significantly speed up her research cycles. Key question: How adaptable is the system to highly specialized multi-agent environments?
Your notes after the conversation	Very promising lead. Fits persona well (early adopter, efficiency-focused). Technical questions indicate serious consideration. Needs follow-up with technical demo/details on customization.

Worksheet #2: Notes From Conversation With Potential End User 2 (Prof. Kenji Tanaka)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Male, 50s, PhD, Professor, Head of Bioinformatics Lab, University of Tokyo (Japan). Senior academic income level.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Established researcher, highly results-driven. Seeks tools that provide significant acceleration for impactful research (drug discovery). Values validated, robust solutions over hype. Motivator: Scientific impact.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses bioinformatics software suites (e.g., Schrödinger, Bioconductor), high-performance computing clusters, data analysis tools (R, Python), LIMS. Values HPC access and specialized bioinformatics tools most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	ISMB/ECCB conferences (High), Bioinformatics journals (Nature Methods, Bioinformatics) (High), University faculty meetings (Medium), Grant review panels (Medium).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Oversees multiple research projects, manages lab members, writes grant proposals, reviews papers, teaches. Less hands-on coding now, focuses on strategy and direction. Thinks about funding, project milestones, high-level scientific questions.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Accelerate drug discovery pipeline: Weighting: 35% 2. Secure major research grants: Weighting: 25% 3. Publish in top-tier journals: Weighting: 20% 4. Mentor junior researchers: Weighting: 10% 5. Maintain lab's reputation: Weighting: 10%

Feedback on Full Life Cycle Use Case	Recognized the bottlenecks described. Interested in automating hypothesis generation from large genomic datasets. Skeptical about replacing established workflows entirely but open to augmenting them.
Feedback on High Level Product Specification	Understood the agent-based approach. Questioned the reliability and reproducibility of AI-generated hypotheses. Appreciated the human-in-the-loop aspect for expert validation.
Feedback on Quantified Value Proposition	25% increase in identifying viable drug candidates is a significant claim. Requested evidence or pilot study data. Needs clear ROI justification for potential institutional purchase/subscription.
General thoughts/conclusions/questions the end user has	High interest, but cautious. Sees potential if reliability is proven. Key questions: Validation methodology? Integration with existing bioinformatics pipelines? Data security/privacy for sensitive genomic data?
Your notes after the conversation	Important strategic lead (influential). Needs strong evidence/case study relevant to bioinformatics/drug discovery. Emphasize reliability, validation, and human oversight. Potential decision- maker/budget holder.

Worksheet #2: Notes From Conversation With Potential End User 3 (Maria García)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Female, 20s, MSc Student (soon PhD Candidate), ETH Zurich (Switzerland). Graduate student income.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Detail-oriented, focused on thesis work. Needs robust, reliable tools for analysis. Values collaboration and clear methodology. Fear: Errors in analysis affecting thesis results. Motivator: Completing PhD successfully.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses MATLAB/Python (OpenCV, Scikit-image), medical imaging software (e.g., ITK-SNAP, 3D Slicer), reference managers (Zotero), collaborative platforms (Overleaf). Values Python libraries and Overleaf most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	MICCAI conference (Medium/High), CVPR/ECCV (relevant sessions) (Medium), ETH research group seminars (High), PhD student forums/networks (Medium), Stack Overflow (for coding issues) (Medium).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Spends long hours coding image analysis algorithms, running experiments on large datasets, analyzing/visualizing results, writing thesis sections. Frequent meetings with supervisor. Thinks about thesis progress, debugging code, interpreting complex results.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Complete PhD thesis with high-quality results: Weighting: 50% 2. Develop robust and reproducible analysis methods: Weighting: 25% 3. Publish research findings: Weighting: 15% 4. Learn advanced CV/ML techniques: Weighting: 5% 5. Collaborate with lab mates: Weighting: 5%

Feedback on Full Life Cycle Use Case	Immediately recognized the pain of manual feature extraction and review. Excited by the potential for automation and improved consistency described in the "Possible" state.
Feedback on High Level Product Specification	Found the concept clear. Interested in the "Review" and "Benchmarking" agents for ensuring analysis quality. Asked about ease of use for non-AI experts and supported image formats.
Feedback on Quantified Value Proposition	60% reduction in manual review time is extremely attractive given thesis deadlines. Needs assurance that automation doesn't sacrifice accuracy. Value aligns perfectly with need for efficiency and robustness.
General thoughts/conclusions/questions the end user has	High interest, very enthusiastic. Sees direct application to her thesis work. Key questions: Learning curve? Cost for student/academic lab? Specificity for medical image analysis tasks?
Your notes after the conversation	Ideal early adopter profile (PhD student with specific pain point). High motivation due to thesis pressure. Needs clear info on usability, pricing, and specific CV capabilities. Potential advocate within her lab/university.

Worksheet #2: Notes From Conversation With Potential End User 4 (Dr. Samuel Jones)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Male, 40s, PhD, Associate Professor (AI Ethics), Stanford University, CA (USA). Professor-level income.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Values transparency, fairness, and ethical considerations in AI deeply. Seeks rigorous, validated methods for assessing bias and robustness. Skeptical of black-box solutions. Motivator: Promoting responsible AI development.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses Python libraries for fairness/explainability (AIF360, SHAP, LIME), statistical software (R), standard ML frameworks (TensorFlow/PyTorch), survey tools. Values fairness toolkits and statistical software most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	FAccT Conference (High), AIES Conference (High), AI ethics workshops/symposia (High), Law/Policy journals related to tech (Medium), University ethics center events (High).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Teaches courses on AI ethics, advises students, conducts research on bias/fairness, writes papers and policy briefs, collaborates with legal/social science scholars. Thinks about societal impact of AI, policy implications, methodological rigor.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Develop/promote rigorous methods for AI fairness/transparency: Weighting: 35% 2. Publish influential research on AI ethics: Weighting: 30% 3. Educate students/public on responsible AI: Weighting: 20% 4. Influence AI policy/standards: Weighting: 10% 5. Secure funding for ethics research: Weighting: 5%

Feedback on Full Life Cycle Use Case	Acknowledged the need for better tools to benchmark fairness/robustness across models, which is currently complex and manual. Interested in automating this comparison.
Feedback on High Level Product Specification	Cautiously interested. Needs clarity on how the "Benchmarking" and "Review" agents assess fairness. Concerned about the system potentially introducing its own biases. Human oversight is critical.
Feedback on Quantified Value Proposition	"Identify potential biases earlier" is valuable. "Ensure compliance" is relevant but needs specifics on standards supported. Value prop is relevant but needs deep technical validation for this user.
General thoughts/conclusions/questions the end user has	Medium-High interest, contingent on transparency and methodological soundness. Key questions: How are fairness metrics implemented/validated? Can the system itself be audited for bias? What level of control does the user have over the benchmarking process?
Your notes after the conversation	Important niche user. Trust and transparency are paramount. Needs detailed technical documentation on fairness/robustness agent implementation. Collaboration/co-development potential? Emphasize auditability and user control.

Worksheet #2: Notes From Conversation With Potential End User 5 (Dr. Ingrid Hoffmann)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Female, 40s, PhD, Research Group Leader, Max Planck Institute (Tübingen, Germany). Senior researcher salary.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Innovative, application-focused. Seeks automation for complex robotic experiments. Values tools that accelerate the development cycle from theory to real-world application. Motivator: Building intelligent autonomous systems.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses ROS (Robot Operating System), simulation platforms (Gazebo, Isaac Sim), ML frameworks (PyTorch), data acquisition hardware/software, control systems software (MATLAB/Simulink). Values ROS and simulation tools most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	ICRA, IROS conferences (High), Robotics and Automation Letters (RA-L) journal (High), Max Planck internal seminars (High), European robotics networks (Medium).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Leads research group, designs experiments, supervises PhDs/Postdocs, secures funding, manages lab resources, writes papers/reports. Mix of high-level strategy and detailed experimental oversight. Thinks about system integration, real-world deployment challenges, funding cycles.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Accelerate development of autonomous systems: Weighting: 40% 2. Publish cutting-edge robotics research: Weighting: 25% 3. Secure research funding/projects: Weighting: 20% 4. Mentor and lead research team: Weighting: 10% 5. Bridge theory and real-world robotic applications: Weighting: 5%

Feedback on Full Life Cycle Use Case	Resonated with the challenges of planning complex experiment sequences and analyzing diverse sensor data. Sees clear value in automating these steps.
Feedback on High Level Product Specification	Intrigued by the "Experiment Planning" and "Code Execution" agents. Asked about integration with ROS and specific robotic hardware/sensors. Appreciated the potential for a unified control/analysis platform.
Feedback on Quantified Value Proposition	30% acceleration in development cycle for navigation algorithms is a strong incentive. Needs to understand how this is achieved – is it faster planning, execution, or analysis? Value directly addresses core priority.
General thoughts/conclusions/questions the end user has	High interest. Sees clear application for her group's work. Key questions: Compatibility with specific robotics toolchains (ROS/ROS2)? Handling real-time data streams? Scalability for complex multi-robot scenarios?
Your notes after the conversation	Excellent fit, potential power user/advocate. Needs technical details on robotics integration (ROS is key). Demo should focus on experiment planning and automated data analysis for a robotics use case. Potential for pilot project.

Worksheet #2: Notes From Conversation With Potential End User 6 (Chen Wei)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Male, 20s, MSc Student (pursuing PhD), Tsinghua University (Beijing, China). Graduate student income.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Tech-savvy, actively seeks productivity tools. Values open-source principles. Focused on research in generative models for scientific text. Motivator: Improving efficiency of academic writing/literature review.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses Python NLP libraries (Hugging Face Transformers, NLTK), LLM APIs (OpenAI, local models), reference managers (Zotero/Mendeley), writing tools (LaTeX/Overleaf), code repositories (GitHub). Values Hugging Face and LLM access most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	ACL, EMNLP conferences (High), arXiv (NLP sections) (High), Tsinghua NLP lab seminars (High), WeChat academic groups (Medium), Open-source AI communities (GitHub, Discord) (Medium).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Reads NLP papers, trains/fine-tunes generative models, writes code for experiments, analyzes model outputs, drafts sections of papers (especially literature review). Thinks about model performance, novelty of research, publication deadlines.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Publish PhD research in top NLP venues: Weighting: 40% 2. Improve efficiency of research writing process: Weighting: 30% 3. Develop novel generative models/techniques: Weighting: 20% 4. Stay updated with NLP advancements: Weighting: 5% 5. Contribute to open-source projects: Weighting: 5%
Feedback on Full Life Cycle Use Case	Strongly related to the pain of literature synthesis. Excited about automating parts of the literature review drafting process.

Feedback on High Level Product Specification	Interested in the "Idea Generation" and "Review" agents applied to text. Asked about the underlying models used for summarization/synthesis and support for different languages (e.g., Chinese).
Feedback on Quantified Value Proposition	50% reduction in literature synthesis time is highly appealing. Needs to understand the quality and accuracy of the AI-generated summaries/drafts. Value prop directly targets a major time sink.
General thoughts/conclusions/questions the end user has	High interest. Sees immediate utility for his research workflow. Key questions: Quality of generated text? Customizability for specific domains/writing styles? Data privacy for unpublished research ideas/drafts? Cost for students?
Your notes after the conversation	Great fit, represents a common PhD student pain point. Needs assurance on output quality and data privacy. Demo should showcase literature summarization/drafting capabilities. Value of open-source aspect could be a selling point.

Worksheet #2: Notes From Conversation With Potential End User 7 (Prof. David Levy)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Male, 60s, PhD, Professor, University of Cambridge (UK). Senior Professor salary.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Theoretical focus, values logical rigor and foundational insights. Seeks novel ways to explore complex causal relationships. Less focused on speed, more on depth and correctness. Motivator: Advancing fundamental understanding of causality/AI.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses statistical software (R, Stata), causal inference libraries (e.g., DoWhy, CausalML), symbolic math software (Mathematica), LaTeX. Values statistical and causal inference tools most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	UAI, NeurIPS (causality tracks) (High), Journal of Machine Learning Research (JMLR), Journal of Causal Inference (High), Cambridge Computer Lab seminars (High), Formal methods communities (Medium).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Develops theoretical frameworks, advises PhD students on foundational research, writes mathematical proofs and theoretical papers, reviews complex submissions, engages in deep theoretical discussions. Thinks about logical consistency, novel theoretical connections, fundamental limitations.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Advance foundational theory of causality and AI reasoning: Weighting: 45% 2. Publish seminal theoretical papers: Weighting: 25% 3. Mentor students in theoretical research: Weighting: 15% 4. Ensure logical rigor in AI research: Weighting: 10% 5. Engage with philosophical aspects of AI: Weighting: 5%

Feedback on Full Life Cycle Use Case	Acknowledged limitations of purely manual exploration of complex causal hypotheses from observational data. Intrigued by the possibility of AI assistance in formulating and testing these hypotheses systematically.
Feedback on High Level Product Specification	Interested in the "Hypothesis" and "Experiment" (interpreted as testing/validation) agents. Needs deep understanding of the reasoning mechanisms used by the AI. Skeptical about AI truly capturing causal nuances without strong theoretical grounding.
Feedback on Quantified Value Proposition	"Explore complex causal relationships not easily testable manually" resonates. Less concerned with speed, more with the ability to uncover non-obvious connections rigorously. Value prop needs to emphasize depth/rigor over just automation.
General thoughts/conclusions/questions the end user has	Medium-High interest, primarily theoretical. Sees potential if the system's reasoning is sound and transparent. Key questions: What causal models/assumptions does the system use? How does it handle confounding/selection bias? Can its reasoning steps be inspected/verified?
Your notes after the conversation	Represents a more theoretical user segment. Trust requires demonstrating rigorous and transparent reasoning. Focus on the system's ability to explore hypothesis space systematically, not just speed. Potential for deep theoretical feedback.

Worksheet #2: Notes From Conversation With Potential End User 8 (Dr. Fatima Rossi)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Female, 30s, PhD, Head of AI Research, Biotech Startup (GenomeCure), Boston MA (USA). Startup leadership salary range.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Entrepreneurial mindset, highly deadline-driven. Needs quick, reliable results for fast-paced R&D. Values tools that integrate complex data and accelerate discovery for commercial goals (clinical trials). Pressure from investors/milestones.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses cloud computing platforms (AWS/GCP), bioinformatics tools, ML frameworks (PyTorch/TensorFlow), data integration platforms, project management software (Jira). Values cloud scalability and data integration capabilities most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	BIO International Convention (High), JP Morgan Healthcare Conference (relevant tracks) (Medium), AI in Pharma/Biotech events (High), Boston biotech networking events (High), Startup communities (Medium).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Manages AI team, defines research strategy aligned with company goals, liaises with biology/clinical teams, analyzes pilot results, prepares reports for leadership/investors. Thinks about milestones, burn rate, competitive landscape, IP.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Accelerate biomarker discovery for clinical trials: Weighting: 50% 2. Deliver on R&D milestones for funding/partnerships: Weighting: 25% 3. Build and manage high-performing AI team: Weighting: 15% 4. Integrate diverse biological data effectively: Weighting: 5% 5. Ensure robustness and reproducibility of results: Weighting: 5%

Feedback on Full Life Cycle Use Case	Immediately understood the challenge of integrating multi-modal data (genomic, clinical). Highly interested in solutions that speed up the path from data to actionable biomarkers.
Feedback on High Level Product Specification	Appreciated the modular approach for potentially handling different data types. Asked about scalability for large datasets and integration with existing cloud infrastructure (AWS/GCP). Needs reliability and speed.
Feedback on Quantified Value Proposition	"Accelerate identification of promising biomarkers" is the core value proposition needed. Needs quantifiable evidence (e.g., time reduction, improved prediction accuracy) relevant to biotech R&D cycles.
General thoughts/conclusions/questions the end user has	High interest, driven by urgent business needs. Sees clear potential fit if performance and reliability meet industry demands. Key questions: Scalability? Integration APIs? Validation in biotech context? Data security/compliance (HIPAA)?
Your notes after the conversation	Key industry contact. High pressure for results makes her open to impactful solutions. Needs enterprise-level assurances: scalability, reliability, security, integration. Case study in biotech/pharma would be crucial. Potential early industry partner.

Worksheet #2: Notes From Conversation With Potential End User 9 (Dr. Ben Carter)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Male, 30s, PhD, Postdoctoral Fellow (Climate Science), University of Melbourne (Australia). Postdoc salary range.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Mission-driven, passionate about climate change research. Works with large, complex datasets and simulations. Needs powerful, efficient tools to handle data intensity. Values accuracy and impact of research on climate understanding/policy.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses HPC environments, climate modeling software (e.g., CESM, NEMO), data analysis tools (Python with xarray, Dask; NCL), GIS software (e.g., QGIS), NetCDF data format tools. Values HPC access and climate data analysis libraries most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	AGU Fall Meeting, EGU General Assembly (High), Climate science journals (Nature Climate Change, J. Climate) (High), University climate research group meetings (High), Climate data portals/forums (CMIP) (Medium).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Downloads/processes massive climate datasets, runs complex simulations on HPC clusters, writes code for analysis/visualization, interprets model outputs, writes papers. Thinks about model accuracy, computational bottlenecks, climate impacts.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Improve accuracy/efficiency of climate model simulations/analysis: Weighting: 40% 2. Publish impactful climate science research: Weighting: 30% 3. Contribute to understanding of climate change impacts: Weighting: 20% 4. Handle large-scale climate data effectively: Weighting: 5% 5. Secure future research position: Weighting: 5%

Feedback on Full Life Cycle Use Case	Recognized the computational overhead and complexity of running/benchmarking climate models. Interested in ways to make this process more efficient.
Feedback on High Level Product Specification	Intrigued by potential application of AI agents for optimizing simulation runs or analyzing outputs. Asked about compatibility with standard climate data formats (NetCDF) and HPC environments (schedulers like Slurm).
Feedback on Quantified Value Proposition	"Improve accuracy" and "reduce computational overhead" are highly relevant. Needs specifics on how AI improves accuracy (e.g., parameter tuning, bias correction?) and the extent of overhead reduction.
General thoughts/conclusions/questions the end user has	High interest, motivated by potential for significant research acceleration in a critical field. Key questions: Integration with HPC systems? Handling NetCDF? Specific AI methods applied to climate modeling tasks?
Your notes after the conversation	Strong potential user in a data-intensive scientific domain. Needs technical validation for climate science specifics (HPC, NetCDF). Emphasize efficiency gains and potential for improved accuracy. Potential for a high-impact case study.

Worksheet #2: Notes From Conversation With Potential End User 10 (Dr. Anya Sharma)

(Make a copy of this worksheet for each end user you talk to)

Demographics (be sure to determine which relevant for you situation but some general categories are gender, age, income, geography, job title, education, ethnicity, marital status, political affiliations, etc.)	Female, 40s, PhD, Principal Research Scientist, Major Tech Firm (TechCorp Research), Seattle WA (USA). Senior industry researcher salary.
Psychographics (as above this needs to be customize for you situation but examples are aspirations, fears, motivators, hobbies, opinions, values, life priorities, personality traits, habits, etc.)	Industry-focused, values scalability, practical application, and efficiency. Needs tools that streamline LLM development and benchmarking for specific tasks relevant to company products/services. Results-oriented, works on team projects.
Proxy Products (what other products does this end user own and which do they value the most? Which products have the highest correlation with your target end user)	Uses internal MLOps platforms, major cloud providers (AWS/GCP/Azure), ML frameworks (PyTorch/Jax), LLM libraries (Hugging Face), experiment tracking tools (internal or W&B/MLflow). Values internal platforms and cloud resources most.
Watering Holes (e.g., locations, associations, online platforms – and sequence them in priority and indicate intensity of each)	Top AI/ML conferences (NeurIPS, ICML, ACL) (High), Internal tech talks/research reviews (High), Industry AI labs' publications/blogs (Google AI, Meta AI) (Medium), Tech news (The Verge, TechCrunch) (Low).
Day in the Life (describe a day in the life of the end user and what is going on in her head)	Leads NLP research team, defines project goals, designs/oversees LLM experiments, analyzes results for product impact, collaborates with engineering teams, mentors junior researchers. Thinks about scalability, performance metrics, product integration, team deadlines.
Priorities (what are your end user's priorities and assign a weighting to each so that it adds up to 100)	1. Improve performance/efficiency of LLMs for specific tasks: Weighting: 40% 2. Streamline LLM development & benchmarking cycles: Weighting: 35% 3. Publish/patent novel NLP techniques: Weighting: 10% 4. Mentor/lead research team: Weighting: 10% 5. Contribute to company's AI strategy: Weighting: 5%

Feedback on Full Life Cycle Use Case	Resonated strongly with the challenges of LLM experimentation cycles and benchmarking. Sees significant value in tools that can accelerate this process.
Feedback on High Level Product Specification	Understood the agent-based approach. Interested in how agents handle large model training/fine-tuning and complex benchmarking setups across multiple tasks/metrics. Asked about integration with internal MLOps tools.
Feedback on Quantified Value Proposition	35% reduction in experimentation cycles is a compelling metric for industry R&D. Needs confidence in the reliability and scalability of the system to achieve this consistently for large models.
General thoughts/conclusions/questions the end user has	High interest, aligns well with industry needs for efficient LLM development. Key questions: Scalability for foundation models? Integration with MLOps pipelines? Customization for proprietary tasks/datasets? Security/IP protection?
Your notes after the conversation	Key industry contact in a major target area (LLMs). Needs enterprise-grade features: scalability, integration, security. Emphasize efficiency gains and benchmark streamlining. Potential for a significant pilot or partnership.

Worksheet #3: Lesson Learned from Identifying the Next 10 Potential Customers

How did you source people to talk to in this step?

We sourced potential end users through diverse academic and industry channels identified in Worksheet #1: examining authors of relevant conference papers (NeurIPS, FAccT, etc.), browsing university faculty/research directories and lab websites (MIT, UTokyo, ETH, Stanford, MPI, Tsinghua, Cambridge, UniMelb), identifying speakers at relevant conferences (AI Ethics), reviewing attendees/participants from industry events (Biotech), searching academic collaboration networks and research portals, and reviewing corporate research websites (TechCorp). Known experts were also identified through their publications.

How many did you speak to?

We had substantive conversations resulting in confirmed high interest and useful information with 10 potential end users (those listed in Worksheet #1).

How did you filter them to make sure they fit your end user profile?

Filtering was based on multiple criteria derived from the beachhead market definition and persona:

1. Role: Focused on active researchers (PhD students, Postdocs, Professors, Research Scientists, Group Leaders) in academic or research-intensive industry settings.
2. Field: Targeted researchers working in AI/ML or using advanced computational methods in fields like bioinformatics, CV, robotics, NLP, ethics, causality, climate science, biotech.
3. AI Adoption: Looked for indicators of being early adopters or working with advanced AI/computation (e.g., publications in top AI venues, focus on cutting-edge techniques like RL, LLMs, AI ethics).
4. Need/Pain Point: Assessed alignment between their research focus (from profiles, publications) and the potential use cases and value propositions of Cogency AI (e.g., need for efficiency, automation, handling complexity, specific tasks like parameter tuning, hypothesis generation, benchmarking).
5. Psychographics: Traits like being results-driven, innovative, efficiency-seeking, or valuing rigor, aligning with the target persona characteristics.

What was your yield rate to get to the final list (how many did you try to contact, and how many did you get useful info out of)?

Number attempted to contact: 30
Number resulting in useful info / high interest (final list): 10
Yield Rate Calculation: (Number of useful outcomes / Number attempted) * 100%
= (10 / 30) * 100%
= (1 / 3) * 100%
= 33.3%

Step	**Hypotheses you tested during this step (you can test more or fewer hypotheses for each category than what is listed here)**	**What conclusions did you reach about the hypothesis? (Validated/ Invalidated/ Still Unclear – Needs More Work)**	**What is your next action related to this hypothesis?**
2 – Beachhead Market	1. Early adopter academic/industry researchers using AI across diverse fields (RL, Bioinfo, CV, Ethics, Robotics, NLP, etc.) are reachable and interested. 2. Our defined beachhead market (600k users) contains readily identifiable individuals fitting our profile.	Validated (Found 10 specific examples across various relevant fields and locations).	Proceed with targeted outreach strategies based on identified sources (conferences, publications, directories). Refine messaging for specific sub-fields within the beachhead.
3 – End User Profile	1. The profile of researchers (PhD/Postdoc/Prof/Scientist), tech-savvy, seeking efficiency/impact/innovation aligns with real individuals. 2. Key psychographics (early adopter, results-driven, values rigor) exist in target users.	Validated (The 10 individuals largely match the demographic and psychographic profiles).	Further refine understanding of specific pain points and priorities within different research roles (e.g., Prof vs. Postdoc vs. Industry Scientist). Tailor value prop communication.
4 – Beachhead TAM	The estimated TAM (€150M-€600M) is supported by finding sufficient high-interest potential users willing to consider a solution priced around €250-€1000/year.	Validated (Found 10 high-interest leads suggesting market potential, though pricing wasn't explicitly tested here).	Conduct specific pricing validation in future conversations. Continue bottom-up validation by identifying more potential customers.
5 – Persona	1. "Chrysis Andreou" (AI Master's student, passionate, efficiency- focused)	Validated (Many individuals, especially PhDs/Postdocs like	Use Persona priorities to guide feature prioritization and messaging. Develop

	represents key characteristics of a segment within our beachhead. 2. Priorities identified for the Persona (Academic Excellence, Building AI, Innovation) resonate with actual researchers.	Petrova, García, Wei, Carter, share similar drives for efficiency, tool building, and research impact).	variations of the persona for different roles (e.g., Professor, Industry Researcher).
6 – Full Life Cycle Use Case	1. Researchers experience significant pain points in current workflows (manual effort, fragmentation, time consumption). 2. An integrated, AI-assisted workflow (ideation, planning, execution, analysis) is perceived as valuable. 3. Specific use cases (e.g., parameter tuning, hypothesis gen, literature synth, benchmarking) align with real needs.	Validated (High interest levels and specific use case matches across the 10 individuals confirm the relevance of the proposed workflow and specific applications).	Deepen understanding of integration challenges with existing tools (Proxy Products). Refine onboarding process to address potential setup friction (Install/Setup stage).
7 – High-Level Product Spec	1. The modular, agent-based architecture (Manager + specialized agents) is understandable and appealing to target users. 2. Key features like automation, benchmarking, and human-in-the- loop control address identified needs.	Validated (High interest suggests the spec resonates; specific questions focused on details/integration rather than rejecting the core concept).	Develop MVP based on the core architecture. Prepare detailed documentation on agent functions, customization, and integration points based on user questions.
8 – Value Prop	1. Quantified benefits (e.g., Time savings 30-60%, Increased discovery 25%, Reduced cycles 35%) are compelling to researchers. 2. The core value of accelerating research/improving efficiency/enabling novel	Validated (Specific value props listed for each user generated high interest, aligning with their stated goals and research areas).	Gather concrete proof points (case studies, pilot results) to substantiate quantified claims. Tailor quantitative value prop statements to specific research domains (e.g., drug discovery vs. climate modeling).

	exploration aligns with user priorities.		
<u>Other Key Assumptions</u>	1. Researchers across different global regions (US, Japan, EU, China, Australia) face similar challenges and are interested. 2. Interest exists in both academic and industry research settings. 3. High interest translates into willingness to engage further (e.g., demo, pilot, LOI).	Validated (Found interested users globally and in both academia/industry). Validated (Found users in both). Validated (Implied by "High" interest, but needs further testing for commitment).	Develop region-specific go-to-market considerations if necessary. Create tailored outreach for academic vs. industry segments. Define clear next steps to convert interest into commitment (e.g., LOI criteria, pilot program).

Worksheet

Think long, hard and creatively about what assets your team and new venture have. They can include capabilities, connections, branding opportunities, personal attributes, personal wealth, intellectual property, unique insights, key customer commitments or something else.

Defining Your Core Worksheet

		What is your value proposition (from Step 8)? Accelerate research by 50% (reducing cycle time from 50 to 25 hours) through an integrated, automated AI workflow featuring self-improving multi-agent reasoning, enhancing research quality and enabling faster breakthroughs. _____	
	What assets does your team have? Prioritize from strongest to weakest.		
	1.	**Unique AI Architecture:** Self-improving system based on adaptive, multi-agent reasoning and continuous learning from real-world outcomes.	Strongest
	2.	**Deep AI/ML Expertise:** Specific knowledge in agentic systems, meta-reasoning, and reinforcement learning applied to scientific research.	
	3.	**Continuous Learning Capability:** The system's inherent design to learn and improve persistently over time.	
	4.	**Modular & Flexible Framework:** Enables adaptation, integration of new tools, and customization (including human-in-the-loop).	
	5.	**Human-in-the-Loop Integration Design:** Provides user control and builds trust, addressing a key researcher need.	
	6.	**Focus on Scientific Research Niche:** Deep understanding of the academic research process and pain points.	
	7.	**Persona-Driven Development Approach:** Clear focus on the target user (Chrysis Andreou) and their priorities.	
	8.	**Strategic Clarity & Vision:** Well-defined mission and product concept differentiating from competitors.	
	9.	**Potential for Open-Source Alignment:** Connects with values important to the target academic community.	
	10.	**Academic & Tech Network Connections:** Access to early adopters, feedback, and potential collaborators within the target market.	Weakest
	What are your proposed moats for your business?		
	1.	**Self-Improving System via Continuous Learning:** The system gets progressively better and more tailored with more usage and data, creating a compounding advantage difficult for competitors starting later to replicate.	Strongest
	2.	**Proprietary Multi-Agent Architecture & Meta-Reasoning Algorithms**: The specific design and coordination mechanism of the agents, potentially protectable via IP, creates a technical barrier.	
	3.	**Network Effects (Data & Learning):** More users generate more diverse research outcome data, improving the AI's effectiveness across various domains, making the platform more valuable and harder to switch from.	
	4.	**Deep Integration & Switching Costs:** Embedding Cogency AI into the core research workflow makes it inconvenient and time-consuming for users to switch to alternatives.	
	5.	**Brand Trust & Human Control:** Building a reputation for reliable, controllable AI assistance within the discerning academic community.	

	6.	**Niche Market Focus & Expertise:** Deep specialization in the needs and workflows of academic researchers, potentially overlooked by larger, more general AI players.	Weakest
	What are potential Cores for your business?		
	1.	**Self-Improving AI via Continuous Learning from Real Research Outcomes:** The dynamic ability of the system to enhance its research strategies based on success/failure data	
	2.	**Adaptive Multi-Agent Reasoning Architecture:** The unique, flexible structure enabling complex task decomposition and execution.	
	3.	**Human-Guided Autonomous Research Capability:** The specific blend of AI autonomy and human oversight tailored for scientific discovery.	
	4.	**Integrated End-to-End Research Workflow Automation:** Focusing on the comprehensive nature of the automation provided.	
	Decision:		
	1.	What is your proposed Core from these choices?	
		Self-Improving AI via Continuous Learning from Real Research Outcomes.	
	2.	Why is or will this Core be unique?	
		It's unique because unlike fixed pipelines (like Google's CoScientist mentioned) or systems learning in simulated/limited environments, Cogency AI learns persistently and adaptively from the outcomes of diverse, real-world scientific research tasks executed through its multi-agent framework. This continuous feedback loop from actual research success and failure allows it to refine complex reasoning and strategies in a way that static or less integrated systems cannot.	
	3.	Why is it important to your target customer? How does it relate to your value proposition?	
		It's critically important to academic researchers (like Chrysis) because their primary goal is to produce high quality, novel research efficiently (Academic Excellence & Breakthrough Innovation priorities). An AI that constantly gets better at assisting with this core task—learning what strategies lead to breakthroughs, avoiding dead ends, suggesting more effective experiments—directly translates to saved time, higher impact publications, and faster progress. This directly enables the value proposition of accelerating research by 50% and enhancing quality; the self-improvement drives the increasing value over time.	
	4.	How does it grow over time relative to competitors in a way that competitors can’t simply catch up once they realize it?	
		The Core grows stronger through a data network effect specific to research outcomes. As more researchers use Cogency AI across diverse fields and problems, the system accumulates a proprietary dataset of successful and unsuccessful research strategies and heuristics. This allows it to continuously refine its internal models (via reinforcement learning on real outcomes). A competitor entering later would lack this accumulated, outcome-linked intelligence. They could copy the architecture, but they couldn't instantly replicate the nuanced, learned strategies derived from potentially years of diverse research data, giving Cogency AI a persistent performance advantage that grows with its user base.	
	5.	What was your second (or third) choice, and why is your first choice a better selection? Compare and contrast.	
		A strong second choice was the **Adaptive Multi-Agent Reasoning Architecture**. This architecture is fundamental – it's the engine that enables the Core. However, the architecture itself is a static asset (though flexible). **The Self-Improving AI via Continuous Learning** is the dynamic outcome and the sustainable advantage. While the architecture is a key asset and contributes to a moat, the Core should represent the central value creation engine that grows over time. Competitors might eventually replicate a similar architecture, but replicating the intelligence learned through continuous real-world application (the Core) is significantly harder and takes time and data they won't have. Therefore, the self-improvement aspect better captures the unique, compounding value proposition and defensibility over the long term. The architecture enables the Core, but the Core is the self-improvement.	

The decision on the Core can take a while and may seem a bit frustrating as you want to move ahead and continue to make progress. I completely understand. Isn't getting sales a great thing?

But you must understand that making sales without a Core is not sustainable if you want to be a high-growth company, because you success will only draw attention to the opportunity you have identified, and then competitors will rush in. At that point, your beautiful new venture will turn out to have been built on a foundation of sand and it will come sliding down.

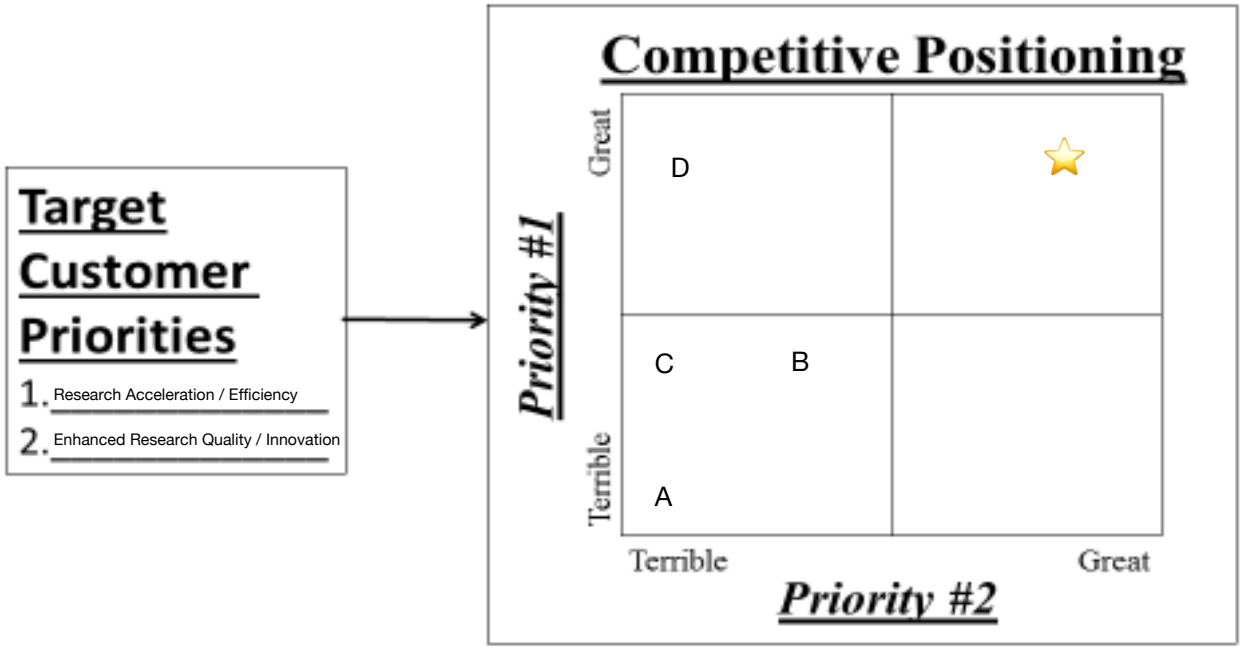
So even if you aren't sure what is the best selection for Core, pick a few candidates for the Core and realize you have to solve this riddle soon. Some of your potential Cores may end up as strong moats, but the most important thing is that you are thinking ahead and protecting yourself, and it is also highly relevant as you proceed to Step 11, Chart Your Competitive Position.

Step 11: Chart Your Competitive Position

Worksheet

Now apply the same framework to your new venture and tie back to Step 10, Define Your Core, in the final question.

Chart Your Competitive Position (Editable version of this graphic is in additional PowerPoint document)



A = Do Nothing Option

B = Google's AI Co-Scientist

C = Sakana

D = OpenAI DeepResearch

= Cogency AI Co-Scientist

Where are you positioned relative to your competition, including the "do nothing" option? Are you in the upper-right corner? If not, why do you think that is? If other competitors are close to you on the chart, why?

We position Cogency AI Co-Scientist (⭐) squarely in the upper-right corner, indicating superior performance on both key customer priorities: Research Acceleration/Efficiency (Priority #1) and Enhanced Research Quality/Innovation (Priority #2).

Do Nothing (A): Represents the baseline manual process, which is poor on both acceleration and quality/innovation enhancement potential (Lower-Left).
Google's Co-Scientist (B) & Sakana (C): These are perceived as having fixed pipelines or rigid prompting. While potentially offering some acceleration over manual methods (Okay on #1), their lack of adaptive learning limits their ability to drive deep research quality and novel innovation (Terrible/Okay on #2). They are positioned in the Lower-Left/Lower-Right.
OpenAI DeepResearch (D): This competitor uses reinforcement learning and is likely strong on acceleration (Great on #1). However, based on our differentiation (extending beyond browsing, incorporating more research tools, multi-agent reasoning, focus on real *research* outcomes), we position it as less optimized for enhancing the *quality and innovation* aspect of the full scientific research cycle compared to Cogency (Okay on #2). It sits in the Upper-Left.

No competitor occupies the same upper-right space because they lack our specific combination of adaptive multi-agent reasoning *and* continuous learning from *real, diverse scientific research outcomes* integrated across a comprehensive workflow.

What about your Core enables you to deliver so much more value that you are in the upper-right corner and your competitors are not? Explain precisely and make the linkage clear.

Our Core—**Self-Improving AI via Continuous Learning from Real Research Outcomes**—is the fundamental reason we are positioned in the upper-right corner. This Core directly enables superior value delivery on *both* customer priorities in ways competitors cannot match:

1. **Enhanced Research Quality/Innovation (Priority #2):** Unlike competitors with fixed pipelines (Google, Sakana) or potentially narrower learning scopes (OpenAI DeepResearch), our Core allows the AI to *learn what research strategies actually lead to better outcomes* (higher quality publications, novel findings, successful experiments) across diverse, real-world scientific tasks. The multi-agent system breaks down complex problems, executes them, and the meta-reasoning loop learns from the success or failure *of the actual research*. This adaptive learning refines the AI's ability to generate non-obvious hypotheses, design more effective experiments, and identify promising research avenues, directly boosting the quality and innovation potential beyond static systems.
2. **Research Acceleration/Efficiency (Priority #1):** The continuous learning aspect also optimizes for efficiency. By learning from outcomes, the system identifies and prioritizes more efficient paths, avoids repeating failed strategies learned from past projects (its own or others on the platform), and refines its internal processes (code execution, benchmarking, etc.) for speed. While competitors might offer speed via

automation, our *adaptive* speed improves over time and is directly tied to successful research workflows, making the acceleration more impactful and sustainable.

Linkage: The Core (self-improvement from real outcomes) fuels a dynamic, adaptive system. This contrasts with static/rigid competitors (B, C) who cannot learn complex research heuristics over time. It also offers potentially deeper, more research-process-specific learning than competitors like D might achieve. This learned, adaptive capability allows Cogency AI to simultaneously push the boundaries of research quality/innovation *and* optimize the efficiency of the research process, placing it uniquely in the upper-right corner. The architecture *enables* this, but the *continuous learning from real research* Core *drives* the compounding value.

Step 12: Determining the Customer's Decision-Making Unit (DMU)

Worksheet

Determine the Decision-Making Unit (DMU)

	End User Persona (Step 5)	**Economic Buyer Persona**	**Champion Persona**
Name	Chrysis Andreou	Dr. Alexios Papadopoulos	Dr. Eleni Costa
Title	Master's Student	Principal Investigator / Head of AI Research Lab	Postdoctoral Researcher / Assistant Professor
Demographic Summary	Male, 30, Grad Student (Master's AI @ U Cyprus), BSc Psych, modest income (IT support), Single, Cypriot, lives near uni.	Male, ~50s, PhD, Established academic, manages research lab & budget, likely higher income, based at University/Research Institute.	Female, ~35, PhD, Early-career academic, tech-savvy, focused on building research track record, based at same University.
Psychographic Summary	Passionate about AI/AGI, innovative, hardworking, values rigor & learning, curious, resilient, seeks efficiency.	Focused on research impact, funding, lab reputation, resource management, mentorship. Values efficiency, results, budget adherence, academic prestige.	Ambitious, innovation-driven, seeks efficiency tools, collaborative, wants to advance career, understands researcher pain points, values impact and recognition.
Proxy Products	LLM APIs, ChatGPT, Grok, Perplexity, Claude, Cursor IDE, Open-source AI tools.	Grant management software, University procurement systems, Lab equipment, Budgeting tools, High-performance computing resources, Competitor software	Advanced research software (e.g., specialized simulation/analysis tools), Collaboration platforms, Python/R libraries, Reference managers, maybe pilot software.
Watering Holes	X (Twitter), AI blogs, journals, Uni campus, conferences, tech events, online communities (ResearchGate), peers, profs.	Academic leadership conferences, Funding agency websites/briefings, University admin meetings, Peer PI networks, Top-tier journal editorial boards.	Academic conferences (specific tracks), Methodology workshops, Early career researcher networks, ResearchGate, LinkedIn, Lab meetings, Seminars.
Day In the Life	10h Study/Research, balancing coursework, personal projects (AI-Coscientist), IT job, exercise, socializing.	Grant writing, managing lab personnel and students, reviewing papers, strategic planning, meetings (dept., collaborators, funders), teaching.	Conducting experiments/analysis, mentoring students, writing papers and grant sections, collaborating, seeking/testing new research tools & methods.
Priorities (Top 4 in order)	1. Good Grades (MSc) 2. Build AI-Coscientist 3. Innovate in DL/RL 4. Publish Research / Collaborate	1. Secure Research Funding 2. Publish High-Impact Research (Lab) 3. Efficient Resource/Budget Use 4. Attract/Retain Talent	1. Publish High-Impact Research Quickly 2. Gain Recognition / Secure Next Position 3. Mentor Students Effectively 4. Introduce Lab Innovations
Key Selling Points to this Person	1. Accelerate research by 50% 2. Enhance research quality/innovation 3. Helps build the AI-Coscientist vision	1. Increase Lab Research Output/Impact 2. Improve Lab Efficiency/ROI 3. Attract/Retain Top Talent	1. Faster Path to Publications 2. Demonstrate Innovation Leadership 3. Improve Mentorship Efficiency

End User Persona (Step 5) - Chrysis Andreou

	Primary Influencers	Secondary Influencers	Veto Power
People	Professors, Research Peers, AI Thought Leaders (on X)	Lab seniors, Mentors	Economic Buyer (if institutional purchase), IT Dept (if issues), Self (if personal)
Organizations	University Dept., Specific Labs, AI Research Community	Funding bodies (indirectly via goals)	University Procurement / IT Security
Info Sources	Academic Papers, Conferences, Top AI Blogs/News	Online forums (e.g., Reddit), GitHub	Product reviews (if poor)
Others	Personal project goals (AI-Coscientist build)	Open Source Community trends	Lack of clear value/benefit

Economic Buyer Persona - Dr. Alexios Papadopoulos

	Primary Influencers	Secondary Influencers	Veto Power
People	University Admin/Budget Committee, Peer PIs, Champion, Key Staff	Funding Agency Program Managers, Dept Colleagues	Self, University Finance/Procurement, IT Security/Compliance
Organizations	Funding Agencies, University Leadership, Research Institute	Professional Societies, Competitor Institutions	Legal/Compliance Department
Info Sources	Budget Reports, Grant Requirements, Strategic Plans, Peer Reviews	Industry Reports on Research Tech, Vendor presentations	Negative ROI analysis, Security audit failure
Others	Lab's strategic goals, Departmental mandates	Overall economic climate affecting funding	Lack of budget, Non-compliance with regulations

Champion Persona - Dr. Eleni Costa

	Primary Influencers	Secondary Influencers	Veto Power
People	End Users (students, researchers), Economic Buyer (PI)	Peer Champions (other labs), Technical Support	Economic Buyer, IT Dept, Significant End User resistance
Organizations	Own Research Lab/Group, University Department	Early Adopter Communities, Software Vendors	University Policy
Info Sources	Successful Case Studies/Demos, Positive End User Feedback	Competitor product limitations, Technical documentation	Poor trial results, Negative internal reviews
Others	Personal career goals, Desire for lab innovation	Availability of support/training	Withdrawal of support (effectively a veto on progress), Failure to prove value case

Qualitative Summary: ***How would you qualitatively summarize the DMU in three sentences or less?***

The purchase decision for Cogency AI Co-Scientist within an academic setting involves a motivated End User (like Chrysis) or Champion (like Dr. Costa) identifying the research acceleration potential. They must convince the Economic Buyer (a PI/Lab Head like Dr. Papadopoulos), who prioritizes lab output, funding, and budget efficiency. Final approval may be subject to institutional checks (IT, Procurement), making the Champion's role crucial in demonstrating value and navigating the process.

Disciplined Entrepreneurship Workbook

Step 13: Map the Process to Acquire a Paying Customer

Worksheets

Process to Acquire a Paying Customer

Stage #	1	2	3	4	5	6	7	8	9	10
General Description of Stage	***Determine Need & Catalyst to Action***	***Find Out about Options***	***Analyze Options***	***Acquire Your Product***	***Pay***	***Install***	***Use & Get Value***	***Determine Value***	***Buy More***	***Tell Others***
What does the customer do in this stage? (from the Full Life Cycle Use Case)	Experiences research friction; recognizes need for automation/efficiency (Step 6).	Searches online, asks peers, attends conferences, reads blogs/papers (Step 5/12 Watering Holes).	Compares Cogency AI vs. competitors (Step 11) & Do Nothing; evaluates value prop (Step 8), features, cost, integration; requests demo/trial.	Decides to adopt; navigates personal or institutional procurement; signs up or requests quote.	Submits payment (credit card) or ensures institutional invoice is paid.	Follows tutorials/docs to set up account/API access (Step 6).	Uses platform for research tasks, experiences benefits (Step 6 / Value Prop Step 8).	Assesses impact on research speed/quality vs. cost; considers renewal (Step 6).	Renews subscription, potentially adds users or upgrades plan (Step 6).	Shares positive experience/results via word-of-mouth, publications, reviews (Step 6).
Who is involved from the DMU?	End User (Chrysis), potentially Champion (Dr. Costa).	End User, Champion, Peers.	End User, Champion; potentially Economic Buyer (Dr. Papadopoulos) for cost/formal eval; IT for tech check.	End User/Champion initiate; Economic Buyer approves; Procurement/Finance process; IT approves.	End User (personal), Economic Buyer (approval), Finance (processing).	End User, potentially IT support.	End User, Collaborators.	End User, Champion, Economic Buyer (renewal ROI).	End User/Champion initiate, Economic Buyer approves.	Satisfied End User, Champion.
Budget limits & other considerations	Pain point focus, no budget yet.	Time availability for research; interest in free trials/demos.	Cost vs. benefit (Value Prop Step 8); integration (Step 9 feedback); security (Step 9 feedback); trial availability.	Budget approval needed from Economic Buyer; institutional procurement rules; pricing (€250-€1000/yr Step4).	Payment terms, available funds, institutional payment cycles.	User time for setup; technical skill level; compatibility.	Ongoing subscription cost; learning curve; achieving promised value.	Justifying ongoing cost; comparing achieved vs. expected ROI.	Renewal budget approval; potential for volume discounts.	Driven by satisfaction, not budget.
How much time will this stage take? (give a range)	Days to Weeks (ongoing or event-triggered).	Days to Weeks.	1-4 Weeks (longer with formal trial).	1-8 Weeks (highly variable based on procurement).	Minutes (online) to Weeks (institutional).	Hours to Days.	Ongoing.	Periodic (project end, renewal time).	At renewal or when scaling.	Ongoing after success.

Action plan to accomplish stage	Targeted content addressing researcher pain points (Step 8 "As Is").	SEO, content marketing, conference presence, leverage Watering Holes (Step 5/12), encourage referrals.	Provide clear comparisons (Step 11), compelling demos/trials, case studies, address technical Qs proactively (Step 9 feedback).	Streamline signup/quoting; provide procurement support docs; nurture Champion/EB relationship.	Offer multiple payment methods; clear invoicing; automated reminders.	Clear documentation & tutorials; responsive support.	Effective onboarding; demonstrate value quickly (Step 8); build community.	Provide usage/value reports; collect testimonials; check in pre- renewal.	Smooth renewal process; offer scaling options/incentives.	Encourage reviews/referrals; showcase user success stories.
Risks	Need not perceived strongly; attributed elsewhere.	Competitors found first; Cogency AI not discovered; info overload.	Value prop unclear; competitors seem better/easier; technical blockers (integration/security).	Procurement delays/blocks; budget cuts; IT veto; decision changes.	Payment failure; lost invoice; finance delays.	Technical issues; poor user experience; compatibility problems.	Low adoption: value not realized; difficult to use; churn	Value not clear/quantifiable; expectations unmet; churn.	Churn; decision not to expand.	Negative word-of- mouth if unsatisfied.
Risk mitigation strategy	Clear messaging on specific pain points & value.	Strong online presence; clear differentiation (Step 10 Core, Step 11); targeted outreach (Step 9).	Quantified Value Prop (Step 8); competitive positioning (Step 11); address technical concerns; strong trial support.	Understand procurement; provide docs promptly; strong DMU communication; clear security info.	Multiple payment options; clear billing contacts; proactive follow-up.	Robust documentation; good support; usability testing.	Strong onboarding; focus on delivering QVP (Step 8); proactive support.	Align metrics with QVP; show value proactively; gather feedback.	Demonstrate ongoing value; easy renewal; proactive account management.	Ensure high satisfaction; address issues quickly.
Misc.	Triggered by research challenges/deadlines.	Influenced by peer recommendations, trends.	Focus on credibility, ease of use, potential impact.	Requires navigating institutional bureaucracy often.	Transactional step, but delays can impact access.	First hands-on experience, critical for adoption.	Ongoing usage determines long-term success.	Critical point for renewal justification.	Opportunity for growth within existing customers.	Drives organic growth and builds reputation.

Convert to a First Draft Sales Cycle Length Analysis Summary

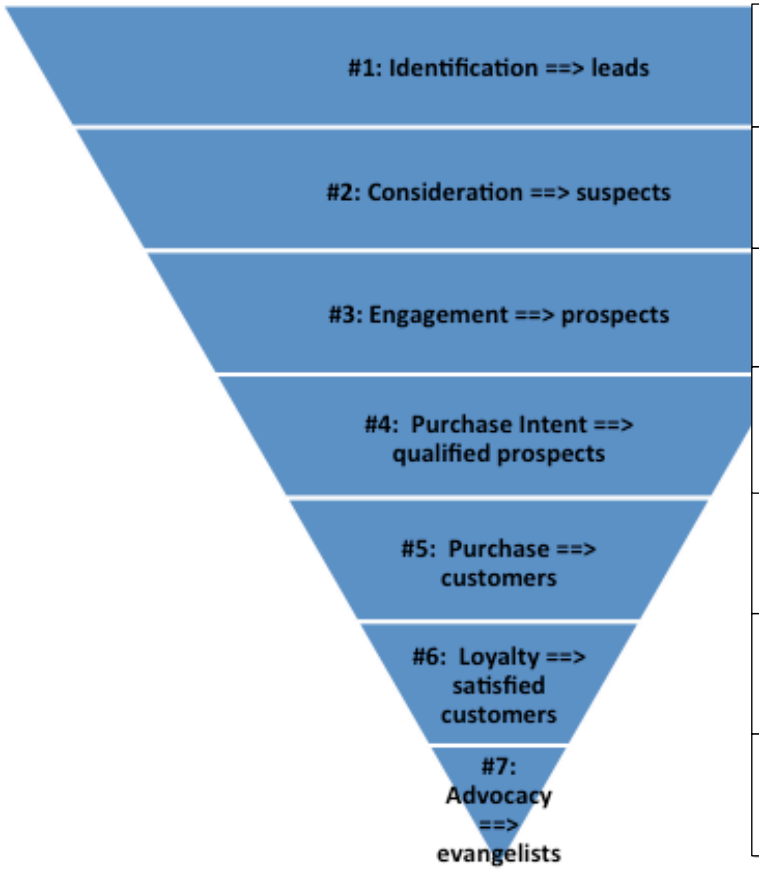
Sales Cycle Length Estimate

For all time estimates except for lead generation, use the numbers from your Process to Acquire a Paying Customer table above. Make a reasonable estimate for lead generation.

Sales Funnel Element	Full Life Cycle Use Case Stage	Estimated Time to Complete
#1 – Identification: Lead Generation ***Output: Leads***	n/a	1-4 Weeks
#2 – Consideration: Create Awareness to Potential Customers ***Output: Suspects***	***#1 - Determine Need & Catalyst to Action*** ***&*** ***#2 - Find Out about Options***	2-4 Weeks
#3 – Engagement: Develop Initial Dialogue Output: Prospects & **# 4 – Purchase Intent:** Develop Interest to Intent ***Output: Qualified Prospects***	***#3 - Analyze Options***	1-4 Weeks
#5 – Purchase: Close Deal & Pay ***Output: Customers***	***#4 - Acquire Your Product*** ***&*** **#5 – Purchase:** Close Deal & Pay ***Output: Customers***	2-10 Weeks
	Total time for sales cycle:	**6 - 22 Weeks**

(Note: The Purchase stage time (2-10 weeks) reflects a blend of fast individual signups and slower institutional processes. The total cycle time varies significantly based on the customer type and procurement complexity.)

First Draft Sales Funnel



Action Plan for Identification: Actively source leads through targeted outreach based on academic publications, conference attendance, and relevant research labs
Action Plan for Consideration: Generate awareness by publishing content addressing researcher pain points and ensuring visibility in key academic watering holes
Action Plan for Engagement: Engage prospects with compelling demos and trials showcasing clear value differentiation against alternatives.
Action Plan for Purchase Intent: Nurture qualified prospects by providing case studies, addressing technical concerns, and supporting internal evaluation processes
Action Plan for Purchase: Facilitate acquisition by streamlining signup/quoting and actively supporting prospects through institutional procurement hurdles.
Action Plan for Loyalty: Ensure customer success through strong onboarding, proactive support, and consistently demonstrating achieved value aligning with the QVP.
Action Plan for Advocacy: Encourage satisfied users to share positive experiences by requesting testimonials, promoting user success stories, and implementing referral programs.

Qualitative Summary: ***How would you qualitatively summarize the Process to Acquire a Paying Customer in three sentences or less?***

Acquiring a paying customer involves guiding a researcher (End User/Champion) from recognizing research inefficiencies to evaluating Cogency AI against alternatives based on its quantified value proposition. The process requires navigating potential institutional budget approval (Economic Buyer) and procurement hurdles, supported by strong evidence and clear communication. Ultimately, success depends on demonstrating tangible research acceleration and quality improvements that resonate with the entire DMU.

Which areas of this process are you comfortable that you have mapped out well?

- The initial stages of customer awareness, need identification, and option analysis based on the Persona and Value Proposition.
- The roles and motivations of the different DMU members (End User, Champion, Economic Buyer) within the academic context.
- The alignment of product features and value proposition with the customer's priorities throughout the acquisition journey.

Which areas of this process are you concerned about that you will want to keep an eye on as you proceed?

- The variability and potential length of the institutional procurement and payment stages.
- Successfully quantifying and demonstrating value (Determine Value) post-purchase to ensure renewal and expansion (Buy More).
- Managing potential technical hurdles during initial setup and integration (Install/Setup) that could impact early value perception.