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

### Worksheet #1: Summary of Next 10 Customers

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| 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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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 relevant papers | Reduce time spent on literature synthesis for publications by 50% | High | Yes | High | Academic Collaboration Network |
| 7 | **Prof. David Levy** | Foundational research in causality and AI reasoning | Professor | [d.levy@cl.cam.ac.uk](mailto: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](mailto: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](mailto: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-](mailto:a.sharma@techcorp-research.com) [research.com](mailto: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)

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| 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)

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| 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)

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| 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)

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| 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)

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| 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)

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| 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)

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| 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)

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| 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)

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| 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)

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| 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

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| **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) represents key characteristics of a segment within our beachhead. 2. Priorities identified for the Persona (Academic Excellence, Building AI, Innovation) resonate with actual researchers. | Validated (Many individuals, especially PhDs/Postdocs like Petrova, García, Wei, Carter, share similar drives for efficiency, tool building, and research impact). | Use Persona priorities to guide feature prioritization and messaging. Develop 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 exploration aligns with user priorities. | 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). |
| **Other Key Assumptions** | 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). |