

1

00:00:00,000 --> 00:00:04,339

In this video we're going to talk about how to run case
在这节课中我们要说一说怎么做案例讨论。

2

00:00:04,359 --> 00:00:08,236

discussions. And the case discussion method we'll be using
以及在讨论案例的时候我们将会用到的一些方法。

3

00:00:08,256 --> 00:00:12,217

in this class. And I'm also going to introduce the idea of
另外，我也会介绍一些商业模式给你们，

4

00:00:12,237 --> 00:00:16,396

business models to you. So case discussion style is very
案例讨论有很多种不同的形式，

5

00:00:16,416 --> 00:00:20,004

different then the style that most scientists and engineers
我现在想花时间讲的这种形式，

6

00:00:20,024 --> 00:00:22,774

will encounter in classrooms, And so, I wanted to spend a
是大多数工程技术人员都会遇到的，

7

00:00:22,791 --> 00:00:26,649

little bit of time talking about what you should expect and
所以我想花一些时间给你们讲解一下，

8

00:00:26,669 --> 00:00:30,233

how you should prepare, as well as how you should write up
让你们了解你们接下来会做些什么，并用什么形式完成你的案例报告。

9

00:00:30,253 --> 00:00:34,146

your case reports. So, in case discussion you as the
所以，在案例讨论中，你和你的同学

10

00:00:34,167 --> 00:00:37,534

students are going to be carrying a lot of the discussion
会进行一系列的讨论和对话，

11

00:00:37,554 --> 00:00:41,902

and the flow of, of the conversation. So you're gonna have
你要认真研读案例，

12

00:00:41,922 --> 00:00:44,732

to read the case very carefully, and come prepared to
并准备好你想讨论的题目。

13

00:00:44,753 --> 00:00:45,753

discuss it.

14

00:00:45,753 --> 00:00:49,380

I'm going to be guiding the discussion, but mainly my role
我会来引导你们的讨论，

15

00:00:49,400 --> 00:00:54,141

will be to ask questions and to provoke you to think more
但我的主要责任是提出问题，并激发你们对案例更深层次的思考，

16

00:00:54,161 --> 00:00:57,729

deeply about the case. But primarily you all will be

但基本上，你们自己要自己进行讨论，

17

00:00:57,750 --> 00:01:01,137

carrying the conversation forward for stretches as long as
把话题延伸到20到25分钟。

18

00:01:01,157 --> 00:01:04,545

ten to twenty minutes at a time. These questions that come
对于案例中的问题，

19

00:01:04,564 --> 00:01:08,343

up in the cases, there's not gonna be a clear right or wrong
不一定非要得出孰是孰非的答案。

20

00:01:08,363 --> 00:01:13,155

answer. And so you must be prepared to argue your side of
并且你随时要做好准备，回答别人对你的论点的弱点的诘问。

21

00:01:13,174 --> 00:01:17,033

the case. There will typically be some dilemma that the
通常，作为领导着或创业者，

22

00:01:17,052 --> 00:01:19,939

protagonist, most of the time the entrepreneur in these
大多数情况下都会遇到像这样进退两难的情况，

23

00:01:19,959 --> 00:01:25,804

cases is facing. And so after you've read the case carefully
所以当你仔细阅读了这些案例后，

24

00:01:25,823 --> 00:01:28,930

you wanna come prepared with the reasons why you would
你应该有充足的理由支持你做出的决定，

25

00:01:28,950 --> 00:01:31,635

choose a certain course of action if you were in the
假设你处在这个创业者或领导者的情况中

26

00:01:31,635 --> 00:01:35,996

entrepreneur shoes or if you were in the protagonist shoes.

27

00:01:36,016 --> 00:01:39,480

These cases are dense and so in the time that we have in
这些案例信息丰富，

28

00:01:39,500 --> 00:01:42,109

class we're not gonna get to discuss all of the case
我们在课堂上可能不能全部覆盖讨论，

29

00:01:42,109 --> 00:01:46,861

necessarily but in your discussion groups you should have
但是在你们的小组讨论中，

30

00:01:46,881 --> 00:01:51,310

time to discuss the case more deeply amongst yourselves.
你应该和你的小组成员充分地深入讨论。

31

00:01:51,330 --> 00:01:55,019

For the online students in the class, you're going to miss
对于网上课程的学生，你们可能会错过

32

00:01:55,039 --> 00:01:58,206

out on some of the interaction and case discussion that we

像我们在课堂上这样面对面讨论的机会，

33

00:01:58,225 --> 00:02:02,036

have in the classroom. But I encourage you, like the
但是我希望你们，和在斯坦福的学生一样，

34

00:02:02,055 --> 00:02:06,155

Stanford students, to come together with your teams or bring
如果你能找到你周边的学生，

35

00:02:06,174 --> 00:02:08,980

a couple of teams together if you're in the same geographic
组成一个小组进行讨论。

36

00:02:08,980 --> 00:02:13,541

area, and discuss the case. You can also use the forum as a
你也可以利用论坛讨论。

37

00:02:13,561 --> 00:02:18,151

mechanism to have case discussions in that way. And so the

38

00:02:18,171 --> 00:02:22,479

Stanford students you bring two teams together and, and your
斯坦福大学的同学，你们可以把两个对组织起来，形成一个大的讨论组，

39

00:02:22,500 --> 00:02:27,131

case discussion groups and together you will write up your
这样你们可以一起讨论我一会儿将要给到你们的案例，

40

00:02:27,151 --> 00:02:30,692

response to the case which I will talk about in a moment as
并记录下你们大组的案例报告

41

00:02:30,712 --> 00:02:32,714

well as discuss the case as a group.

42

00:02:32,734 --> 00:02:36,980

And so there's six criteria that I am looking for in terms
在你们做案例讨论的时候，

43

00:02:37,001 --> 00:02:41,625

of your contributions to the case discussion in class. The
我希望你们达到我接下来提出的六条标准，

44

00:02:41,645 --> 00:02:46,465

first is your clarity and rigor. That is, how well are you
第一条是清楚和准确。这就是说，

45

00:02:46,485 --> 00:02:51,266

able to combine logic, evidence from the case and reasonable
你要把你的观点表达的富有逻辑，有充分来自案例的依据支持你的观点，

46

00:02:51,287 --> 00:02:55,325

assumptions to support your arguments verbally in class?
并且提出合理的假设。

47

00:02:55,346 --> 00:02:59,013

Second is your conciseness, we want as many people
第二点，准而精。

48

00:02:59,033 --> 00:03:02,571

participating as possible so we want you to make your point
我们希望更多的人参与讨论起哄，所以我们希望你的表达准确而简短。

49

00:03:02,591 --> 00:03:08,175

clearly but also concisely. Next is the relevance. And so
第三点，关联性。

50

00:03:08,195 --> 00:03:11,532

you have to think a bit about the fit and the timing. If
所以你要考虑你的观点和讨论的契合度以及讨论的时机。

51

00:03:11,552 --> 00:03:14,759

your comment fits in with the flow of the discussion, then
在何时抛出什么观点才是最合适的（这需要你考虑）

52

00:03:14,780 --> 00:03:16,683

we want to hear it.

53

00:03:16,703 --> 00:03:19,306

[foreign] your comment is something that is best left to a
如果你的讨论在接下来的讨论中抛出更合适，

54

00:03:19,306 --> 00:03:22,687

later part of the discussion then please hold your comments
那么请你暂缓提出它。

55

00:03:22,707 --> 00:03:25,982

about that section of the case until we get to it. What we
等到我们讨论到它的时候再提出来。

56

00:03:26,002 --> 00:03:30,194

really want is some synthesis; we want not just comments for
我们希望达到的是讨论和话题推进的结合，

57

00:03:30,215 --> 00:03:33,812

the sake of commenting and getting your participation grade.
而不只是讨论本身，或者得到讨论的加分。

58

00:03:33,832 --> 00:03:36,999

But we want comments that really take the discussion to a
我们真正希望的是讨论本身能推动话题进入到一个更深

59

00:03:37,019 --> 00:03:41,239

deeper level or abstract away higher level insights from the
更高的层次。

60

00:03:41,259 --> 00:03:46,170

case. These cases can be one particular example, but ideally
这些案例可能是一个具体的例子，

61

00:03:46,191 --> 00:03:50,630

we want to use this one example to extract higher levels
但我们更希望通过这些具体的例子提取出更高层次的

62

00:03:50,650 --> 00:03:54,850

lessons about entrepreneurship, Venture capital and
关于创业，资本和技术的经验。

63

00:03:54,870 --> 00:03:59,300

technology. Then finally creativity, If you can insert some
最后，创造力！

64

00:03:59,320 --> 00:04:03,787

creativity and synthesize comments that have been made so
如果你能在已有的讨论中加入自己的创新观点，

65

00:04:03,807 --> 00:04:06,295

far, build on the discussion. These are the types of
并且搭建起一个新的讨论架构，

66

00:04:06,295 --> 00:04:09,460

comments that will help contribute to our case discussion.
这才是我们希望看到的有建设性的讨论。

67

00:04:09,480 --> 00:04:15,557

Some teams you'll be writing up a case analysis, and so I
有的队会希望写案例分析，

68

00:04:15,577 --> 00:04:18,303

wanted to give some guidelines of what we're looking for in
所以我也会给你们一些如何写案例分析的指导。

69

00:04:18,303 --> 00:04:23,021

these case analyses. First of all we want to see that you've
首先，我希望看到你对这个公司有了一些大致的了解，

70

00:04:23,040 --> 00:04:25,540

gained a basic understanding of the company. From the case
从你的案例分析中，（我希望读到）

71

00:04:25,560 --> 00:04:28,396

you should have understood, what does the company sell and
你已经清楚了这个公司是卖什么的？卖给谁？

72

00:04:28,415 --> 00:04:32,384

to whom? How do people go about buying it? How big are their
为什么人们希望买？他们的营收大约是多少？

73

00:04:32,404 --> 00:04:36,435

revenues? What's the profitability, profitability of the
公司的利润点在哪？

74

00:04:36,454 --> 00:04:39,374

business? Yeah, many of these cases will come with financial
利润点，对，很多案例都会给出公司的财务报告。

75

00:04:39,394 --> 00:04:40,394

statements.

76

00:04:40,394 --> 00:04:44,663

And, I expect you to also read the supporting materials and
我希望你们也会去读一些补充材料，公司的商业报表和财务报告，

77

00:04:44,682 --> 00:04:47,108

the tables and financial statements that come at the end of
这些一般都在案例的最后。

78

00:04:47,108 --> 00:04:50,326

the case. This will help you understand better the financial
这些会帮助你们了解这个公司的财务情况。

79

00:04:50,346 --> 00:04:53,733

situation of the company. And can help diagnose any problems
也会帮你看清这个公司可能面临一些怎样的问题。

80

00:04:53,753 --> 00:04:57,411

that might be going on. How much debt does it have? Do they

公司有多少的债务？

81

00:04:57,430 --> 00:05:02,002

have operational cash flow? Often these issues are extremely
他们有没有足够的运营所需的现金流？

82

00:05:02,021 --> 00:05:05,761

critical at the very early stages of a start up. But my hope
通常这些因素在创业初期都是重要的评价标准。

83

00:05:05,781 --> 00:05:07,846

is that through this class you'll get some basic
我的希望是通过这门课，

84

00:05:07,846 --> 00:05:11,302

understanding of what a cash flow statement is and some of
你能了解什么是公司的现金流报告 (cash flow statement) 和财务报告 (financial statement)

85

00:05:11,322 --> 00:05:14,560

the financial statements in firms. Third, you want to think
第三，你要按照行业标准和竞争者情况来衡量这家公司。

86

00:05:14,580 --> 00:05:17,737

about benchmarking the company against their competitors or

87

00:05:17,757 --> 00:05:21,716

the industry average. How about their profitability? There
他的利润点究竟是什么？

88

00:05:21,736 --> 00:05:24,334

operational efficiency? Most importantly, how are their
他们的运营是不是高校？

89

00:05:24,353 --> 00:05:27,500

products differentiated from that, from those of
他们的产品是不是独一无二，不可替代？

90

00:05:27,520 --> 00:05:31,408

competitors. Then you also might want to think about
然后，你应该想进一步了解这家公司的发展过往，

91

00:05:31,427 --> 00:05:34,685

analyzing the evolution of the company in terms of their
你可以从两个角度了解，

92

00:05:34,705 --> 00:05:38,274

financial situation or in terms of their product development
公司的财务状况以及产品的发展变革。

93

00:05:38,293 --> 00:05:43,456

over time. Other things that you could think about in
还有其他的一些你需要考虑的点包括：

94

00:05:43,475 --> 00:05:48,357

analyzing the cases are, how sustainable is the company? Do
这个公司的持续性和稳定性怎样？

95

00:05:48,377 --> 00:05:52,024

they have a cash burn rate that's going to enable them to
他们烧钱的速度能不能让他们有足够的做出正确决定的时间？

96

00:05:52,044 --> 00:05:55,393

take all the time that they need to make these decisions? Or

97

00:05:55,413 --> 00:05:57,777

are there, is there an important time crunch that they're
或者，他们是不是面临一个关键的时机？

98

00:05:57,777 --> 00:06:01,747

facing? How sustainable is their current cash position and
他目前的现金情况是不是可以确保公司的持续成长？

99

00:06:01,766 --> 00:06:04,002

then their growth?

100

00:06:04,022 --> 00:06:08,004

Next I want you to try and dig deeper. Try and separate what
接下来，我希望你更深入的思考，

101

00:06:08,024 --> 00:06:11,379

are symptoms of the problem from what are, what really the
试图找到真正的问题在什么地方，

102

00:06:11,399 --> 00:06:15,038

underlying problem is. And this can sometimes take a bit
表象下的真正的问题出在哪？

103

00:06:15,057 --> 00:06:17,683

deeper thought in these cases, but I think will enable us to
这些需要你更深层次的思考，

104

00:06:17,683 --> 00:06:21,310

have a more interesting discussion, and you to have a higher
但我觉得这些会引导我们进行些更有趣的讨论

105

00:06:21,329 --> 00:06:23,887

quality write up of the case. And so sometimes you might
你的会写出更有质量的案例报告。

106

00:06:23,887 --> 00:06:26,843

have to actually identify what the key problem in the case
所以有时你需要自己甄别关键问题在哪？

107

00:06:26,862 --> 00:06:29,961

is. You may be presented with the overall situation of the
你需要陈述这个公司的整体情况，

108

00:06:29,980 --> 00:06:33,598

company, but have to diagnose what really the key problems
但是最关键的是你要诊断出它面临的问题是什么，

109

00:06:33,618 --> 00:06:36,726

or key decisions they need to make at this stage are. And
还有他在这个时期应该做出怎样的重要决定。

110

00:06:36,746 --> 00:06:40,194

finally, you should reach some clear decision in the case.
最后，你应该做出准确的判断，

111

00:06:40,214 --> 00:06:43,422

What should the manager or the entrepreneur, what should the
这家公司的创业者，或者CEO，在这种形式下应该做出怎样的判断。

112

00:06:43,442 --> 00:06:47,992

C-E-0 do in this situation? You need to support this course

你要为自己的论点和行动，

113

00:06:48,012 --> 00:06:52,182

of action with a logical argument, with as much evidence and
做出富有逻辑的论述，

114

00:06:52,201 --> 00:06:59,528

supporting arguments as you can. In terms of writing up the
并佐以论据支持。

115

00:06:59,548 --> 00:07:03,947

case, we want you to try and be as concise as possible. You
对于案例报告，我希望你们能做到精简。

116

00:07:03,967 --> 00:07:06,493

can skip a lot of the introduction.

你可以省略很多的背景介绍，

117

00:07:06,513 --> 00:07:10,132

Myself and the teaching team, we've read the case. We want
我应该读过并且很熟悉这个案例了，

118

00:07:10,152 --> 00:07:14,653

to know the questions that you're answering. I want you to
我希望读到你们对于这个问题的解决办法。

119

00:07:14,673 --> 00:07:18,100

build an argument. To not just give the final answer, but,
我希望你提出自己的依据，而不只是给我一个最终的结论。

120

00:07:18,120 --> 00:07:21,106

tell us how you got there. Why you think they should pursue
但是你也让我明白你是如何得出这个结论的。

121

00:07:21,106 --> 00:07:24,725

this course of action. What evidence, what reasons lead you
为什么你认为这家公司应该这么做？

122

00:07:24,745 --> 00:07:28,314

to believe this? So, how you get to your final answer is
是什么理由让你相信他们应该这么做？

123

00:07:28,334 --> 00:07:34,697

imp, as important as what your final recommendation is.
所以你如何得出结论和你最终的结论是同等重要的。

124

00:07:34,717 --> 00:07:37,879

These cases have a lot, a lot of information in them. Not
这些案例里面包含了大量的信息。

125

00:07:37,899 --> 00:07:41,242

at, all of it is necessarily relevant. So you need to learn
这些信息中并不是所有的都有用。

126

00:07:41,262 --> 00:07:44,290

how to filter as you're reading through the cases and pick
所以你要学会如何过滤信息，

127

00:07:44,310 --> 00:07:48,480

out the crucial pieces of information. I'll present some
找到对你来说最重要的信息。

128

00:07:48,500 --> 00:07:51,665

study questions on the website. And so you'll need to answer

我会给你们提出一些问题，这样你就需要回答我的问题，

129

00:07:51,685 --> 00:07:54,552

these study questions, and these will help to point you in
这个过程可以帮助你找到正确的方向，

130

00:07:54,572 --> 00:07:57,949

the right direction in terms of what issues are salient to
你会随着这些问题找到哪些才是我们讨论中的关键点。

131

00:07:57,969 --> 00:08:02,641

our class discussion. Feel free to use outside knowledge or
你完全可以利用外部的知识或者你自己的经验

132

00:08:02,661 --> 00:08:06,810

your own experience, if you have it, to add to the case.
运用到案例的分析中。

133

00:08:06,830 --> 00:08:10,358

But, don't just go on the web and look up the answer. If you
但是不要单纯地上网搜索答案。

134

00:08:10,358 --> 00:08:13,185

just simply go and see what the company did, what decision
如果你只是简单地在网上搜索到了这家公司做了怎样的决定，

135

00:08:13,204 --> 00:08:16,262

they made and then back out your reasons, you're not going
然后根据结论反过来想它这样做的原因，

136

00:08:16,281 --> 00:08:19,439

to learn as much from the case as if you grapple with the
这样不能最大程度地利用这个案例学习，

137

00:08:19,439 --> 00:08:23,105

answer yourself and then after we have the case discussion
讨论后自己找到答案才是最有效的。

138

00:08:23,125 --> 00:08:27,257

I'll give a bit of the update of what subsequently happened
我会稍微告诉你一些这个公司的后续情况。

139

00:08:27,276 --> 00:08:28,276

to the company.

140

00:08:28,276 --> 00:08:36,548

Okay. So next, I want to introduce the idea of the business
接下来，我想给你们介绍关于商业模式的一些知识。

141

00:08:36,567 --> 00:08:40,407

model to you.

142

00:08:40,427 --> 00:08:43,533

So the way we're going to try and strike a balance

所以接下来我们要试着做的是，思考公司的商业模式，

between this is through thinking about the business model

and through thinking about the fact that each piece of the
以及商业模式中的每一个要素。

business model starts out as a hypothesis that you want to
你需要提出一个假设，然后通过考察商业模式中的每一个因素来考证这个商业模式

then go and test in some way and gather real world data on.

这个过程中你还需要收集并加入实际情况中的真实数据。
So initially I want you to focus on this piece of the
所以最开始，我希望你们关注商业模式的最重要的一环，
business model, the customer.
客户。

And so I want you to go out and talk to as many customers as
我希望你们出去和尽可能多的人聊，
you can, gather survey data on them and you want to try and
针对你关心的问题提问，收集你得到的答案。
understand. Which customers want to purchase our product and
什么样的客户希望买我们的产品？

do they really want this product at all? What is the value
他是不是真的希望拥有这款产品？
proposition to them? Value proposition means from the
这款产品对他究竟有什么价值点 (Value Proposition)？

customer's point of view, what value precisely are they

价值点的意思是说，从客户的角度出发，

getting out of your product or service. If this is a product
他们到底看中了你这款产品/服务的什么？

you're selling to another business, how much additional

如果你把这款产品卖给另一家企业，

revenue, how much additional profit is this business going

他们会由此得到怎样的增值？

to earn as a result of purchasing your product? Or if this

在够买了你的产品后，他会为自己产生怎么的价值提升？

is a consumer product, If this a website that the customer
如果这是一款针对消费者本身的产品，比如说这是一个网站，

is going to use, How is it that this new website provides

这个网站会为这名用户提供怎样的额外价值，

additional value to the customer over and above what's

他之前的基础需求是什么？

already out there? And so this is just one piece of the

这只是商业模式中关于客户的一些思考点。

business model here that relates to the customer. And so,

initially you're going to have a first hypothesis about who
最开始，你要提出假设，谁会是你的客户？

those customers are. You might imagine that they're between

你最佳会有一些猜想，比如，你的客户的年龄大约会在20-30岁之间，

the ages of twenty and 30 or that they tend to be more women
可能女性用户会比男性用户多一些

than men or whatever your initial guess might be about who
或者任何关于你客户的一切猜想，

these customers are and why it is that they want your
还有就是为什么会是这部分人群想要你的产品或服务。

product or service.

That's your initial hypothesis. And so then your goal is to

这是你提出的最初假设，接下来你要找出各种方法验证你的猜想。
devise some way to go out and test it, and so this is part

这就是你接下来要去做。
of what you're going to be doing, a large part of what you'

这也是你OAP项目中的大部分功课，
re going to be doing in the OAP project and your

presentations back to the rest of the class. So, you might

另外也是你最后在整个班上做的陈述（presentation）的主要内容。

test this through going out and talking to twenty potential
所以你应该走出去找到至少20个可能成为你客户的人（做调查）

customers, you might also test it through doing some larger
你也许会做大规模的问卷调查，

203

00:12:21,746 --> 00:12:25,403

scale survey, perhaps you can get people to respond to a few
或许你能够得到人们问卷中的一些反馈，

204

00:12:25,423 --> 00:12:28,423

questions on a survey; would they purchase the product, how
比如，他们会不会买这个产品？

205

00:12:28,442 --> 00:12:31,718

much would they pay, why would they purchase this over a
他们会为这个产品付多少钱？

206

00:12:31,738 --> 00:12:35,278

competitor's product. So each of the other aspects of the
为什么他会选择你的产品而不是一个同类的其他产品？

207

00:12:35,298 --> 00:12:39,307

business model whether they might be the source of revenues,
所以商业模式中的其他因素，比如，左右公司营收的因素，

208

00:12:39,326 --> 00:12:44,018

the channels for distribution, the cost structure. What
销售分发渠道，成本核算，

209

00:12:44,038 --> 00:12:47,471

resources or partners you are going to need, what key
你需要的资源，你的合作伙伴，

210

00:12:47,491 --> 00:12:50,862

activities have to take place in the company. Each of these
公司发展的重要事件等等，

211

00:12:50,882 --> 00:12:54,511

are going to have initial hypothesis that your job is to go
所有这些你都需要一个初步假设

212

00:12:54,531 --> 00:12:58,870

out and test in the market, in some way shape or form. And
然后你的工作就是走出去在市场上验证你的假设，并且适当做出定性或调整，

213

00:12:58,890 --> 00:13:02,603

so I just want to play you a short video clip of an
接下来，我会给你们放一小段视频，

214

00:13:02,623 --> 00:13:05,095

experienced venture capitalist talking about the importance
讲的是一位经验丰富的风投者谈到的，走出去
215

00:13:05,115 --> 00:13:09,384
of going out and really understanding who your customers are
了解客户真正在想些什么的重要性，

216
00:13:09,404 --> 00:13:11,669
and why they want to buy your product.
真正了解谁才是你的客户，为什么他们买你的东西的重要性。

217
00:13:11,689 --> 00:13:18,603
So I'm going to exit out of here. And go to the Stanford E
下面我们退出这个页面，进入斯坦福大学Ecorner

218
00:13:18,623 --> 00:13:23,867
corner. And if we mouse over the biography, this is Burke
我们先来看一下Burke Byers的简历

219
00:13:23,887 --> 00:13:27,454
Byers who's been a venture capital investor since 1962, and
他从1962年投身风险投资，

220
00:13:27,474 --> 00:13:32,496
has worked with over 40 new technology-based ventures. And
到现在已经和超过40个科技创业公司共事。

221
00:13:32,516 --> 00:13:39,553
he's with the firm Kleiner, Perkins, Caw field, and Byers.
其中包括著名的Kleiner, Perkins, Cow Field和Byers。

222
00:13:39,573 --> 00:13:42,770
[sound]. If you don't have any customers yet, the most, the
如果你现在还没有任何的客户，

223
00:13:42,790 --> 00:13:45,762
other, I think one of the most important things you need to
我认为你最应该做的就是

224
00:13:45,762 --> 00:13:48,894
do is show that you know who your customers are going to be
了解谁才会是你的客户

225
00:13:48,894 --> 00:13:53,655
and that you have gone out and talked to them.
然后出去找到他们并和他们聊。

226
00:13:53,675 --> 00:13:57,845
Because other than, there, the two fundamental things in a
因为对于公司两个最基本的，

227
00:13:57,865 --> 00:14:01,663
company. One is making something work and being able to ship
一个是做出东西然后把它卖出去，

228
00:14:01,683 --> 00:14:06,514
it. That's what so many people focus on, is all the schedule
这是大多数人关注的，其中包括时间表，技术风险，预算，等等

229
00:14:06,534 --> 00:14:10,603
and technical risk and budgets and all of that stuff. But

230
00:14:10,623 --> 00:14:13,373

the second most important thing is, does anybody want to buy
第二个重要的是，人们是不是真的想买？

231

00:14:13,373 --> 00:14:17,689

it? And no matter what order change you can make in the
不管如果变化，产品的价格或者其他参数，

232

00:14:17,709 --> 00:14:21,558

parameters, cost, or performance or something like that. And
人们是不是还想买？

233

00:14:21,578 --> 00:14:24,686

the thing that's missing from most.

234

00:14:24,706 --> 00:14:28,745

>> Entrepreneurs that we meet is a residence with customers.
创业者这里应该聚集了客户的所有信息，

235

00:14:28,764 --> 00:14:31,942

The fact, there's been any time with customers, and so this

236

00:14:31,962 --> 00:14:33,818

is kind of an, asset test.

所有这就像你在做资产评估。

237

00:14:33,838 --> 00:14:34,838

>> Yeah.

238

00:14:34,838 --> 00:14:36,072

>> Early on.

239

00:14:36,091 --> 00:14:40,451

>> So, I wanted to briefly go back and give you a bit more
下面，我们会简短地做个回顾，并做一下综述，

240

00:14:40,471 --> 00:14:44,539

of an overview and, and framework for how to think about
看一下我们刚才讨论过的9个关键模型，

241

00:14:44,559 --> 00:14:47,987

these nine key models that we discussed previously and I

242

00:14:48,007 --> 00:14:51,697

wanted to kind of group them around this tension between
我希望将他们分组，

243

00:14:51,716 --> 00:15:02,731

planning and experimentation. And so we can think about

244

00:15:02,751 --> 00:15:06,800

these nine models that I presented in the earlier video as

245

00:15:06,820 --> 00:15:10,198

being grouped together in terms of a planning process,
根据规划型和实验型，

246

00:15:10,218 --> 00:15:14,788

experimentation, sales or market segmentation, really

247

00:15:14,808 --> 00:15:20,322

experimenting with the sales or market and reducing risk.
真正地根据市场和销售以及如何降低风险这些饰演阶段进行分类，

248

00:15:20,341 --> 00:15:24,550

And so if we basically think about ventures as being a
所以，如果我们把整个创业过程想象成一个实验推倒的过程，

249

00:15:24,570 --> 00:15:27,096

process of experimentation.

250

00:15:27,116 --> 00:15:32,168

When you have a, an unknown market or a new technology, you
当你面前是一个未知的市场，你拥有一项新技术，

251

00:15:32,188 --> 00:15:35,438

can't know ahead of time all of the parameters that you're
你不能实现知道实验的各项参数，（同时又是重要而不可缺的）

252

00:15:35,455 --> 00:15:38,322

going to need to know. And this makes a traditional planning
这就使得传统的事先规划的方法变得困难和难以操作。

253

00:15:38,342 --> 00:15:43,303

process difficult or impossible to implement. Planning works

254

00:15:43,323 --> 00:15:46,269

just fine if you have a well known market with a known
规划只有在一个充分了解的市场中才能发挥作用，

255

00:15:46,269 --> 00:15:51,150

technology and known customers. But these are not typically
包括你充分了解技术本身和市场上的用户，

256

00:15:51,170 --> 00:15:54,398

the situations that entrepreneurs find themselves in. These
但这些不是创业者通常情况下面临的情况。

257

00:15:54,418 --> 00:15:58,507

are situations that established, mature, large organizations
这些是充分发展的，大型的机构面临的市场。

258

00:15:58,527 --> 00:16:01,814

find themselves in. So if you're in a more unknown,
所以，当你处在一个未知的高风险的市场的时候

259

00:16:01,834 --> 00:16:06,917

uncertain, highly risky environment. Then you need to focus
你需要专注在如何才能降低风险，

260

00:16:06,937 --> 00:16:11,297

more on a process that's going to reduce that risk, and
专注在如何增加确定性。

261

00:16:11,317 --> 00:16:14,293

provide some more certainty. So that process is the
所以这个过程是验证的过程，

262

00:16:14,313 --> 00:16:18,242

experimentation process, and so that's how we reduce risk.
我们通过不断的验证降低风险。

263

00:16:18,262 --> 00:16:21,971

So this is what ties these models together. So we have the
这也是把这些商业模式联系在一起的关键。

264

00:16:21,990 --> 00:16:26,881

models that focus on the planning process. These were the
也有一些商业模式是更关注规划的，

265

00:16:26,901 --> 00:16:33,437

two phases of the class. The buyers and co-author's vision
这就是这节课的两个重要部分。

266

00:16:33,456 --> 00:16:39,370

leading to strategy, leading to execution. In Solomon's
买家需求引领行业导向。

267

00:16:39,389 --> 00:16:43,038

concept of fit, these are all planning models that in some
在Solomon看来，这种规划模型中，你首先完成设计然后加入一些结构形式，

268

00:16:43,057 --> 00:16:46,124

sense you want to plan and add more structure to the

269

00:16:46,144 --> 00:16:49,774

venture. In addition,

270

00:16:49,793 --> 00:16:51,858

[inaudible] three questions every venture capitalist wants

271

00:16:51,878 --> 00:16:57,250

to know is also basically a planning model. We also had
我们也有另外一种模式更侧重风险控制，

272

00:16:57,270 --> 00:17:01,038

models that focused on reducing risk so precisely because

273

00:17:01,058 --> 00:17:03,852

entrepreneurs operate in these markets that have a lot of
因为创业者面临的市场大多数情况下是一个未知的市场，

274

00:17:03,872 --> 00:17:08,346

uncertainty entrepreneurship can be about reducing risk. So
而一个创业者要做的就是不断降低风险。

275

00:17:08,365 --> 00:17:12,916

these were the risk reduction circle, capital and start-up
所以这是风险控制，资本和创业者的竞争。

276

00:17:12,936 --> 00:17:15,932

race that I mentioned.

277

00:17:15,952 --> 00:17:21,685

And then we have one large of risk is the sales and which
然后我们还会面临销售的风险，

278

00:17:21,705 --> 00:17:25,418

market is gonna want the product and so we had a group of
到底什么样的产品是市场需要的，

279

00:17:25,438 --> 00:17:29,604

models that focused on this sort of risk. This was the
我们还有一些商业模型是关于这方面的。

280

00:17:29,624 --> 00:17:35,237

crossing the chasm model. And then, finally, we had models
是这些有交叉的和分叉的模型。

281

00:17:35,257 --> 00:17:39,547

that dealt with experimentation. That running experiments is
最后，我们还有针对预期的商业模型。

282

00:17:39,567 --> 00:17:42,482

one way that we reduce risks and gain knowledge about the
验证过程除了降低风险本身还可以得到有效的经验，

283

00:17:42,502 --> 00:17:49,178

market. So, these were the customer developments process:
这也是发掘客户的过程

284

00:17:49,198 --> 00:17:52,665

[inaudible] starting with action, execution, then leading to
从启动到执行，

strategy and division. So what do we learn in this video. We
然后是商业策略和架构，

learned a bit about the case discussion method. I give you
最后，让我们来看一下我们在这节课中都学到了什么？

an introduction to the business model focusing on the

我给你们简单介绍了不同的商业模型，这些模型的前提都是你相信消费者给你提供的信息，

importance of trusting whether customers actually want your

比如，他们希望你的产品是什么样的，

product and then I give a brief review of the frameworks

然后我们简单看了一下我们之前谈过的

that we talked about earlier.