

## Disciplined Entrepreneurship Workbook

### Step 13: Map the Process to Acquire a Paying Customer

#### Worksheets

Process to Acquire a Paying Customer										
Stage #	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>
General Description of Stage	<b>Determine Need &amp; Catalyst to Action</b>	<b>Find Out about Options</b>	<b>Analyze Options</b>	<b>Acquire Your Product</b>	<b>Pay</b>	<b>Install</b>	<b>Use &amp; Get Value</b>	<b>Determine Value</b>	<b>Buy More</b>	<b>Tell Others</b>
What does the customer do in this stage? (from the Full Life Cycle Use Case)	Evaluates energy bills and identifies inefficiencies in home energy consumption	Customers search for available options in the market for a solution	Compares features, checks user reviews, and contacts vendors for demos	Places an order online or through a representative	Confirms payment details and pays via preferred method	Follows the installation guide or seeks professional help	Configures preferences and monitors energy consumption	Reviews energy bills, assesses user experience, and compares with initial goals	Evaluates upgrades or related products based on their experience	Writes reviews, recommends the product to friends and family, and shares on social media
Who is involved from the DMU?	End User, Economic Buyer, Champion	End User, Economic Buyer, Champion	End User, Economic Buyer, Champion	End User, Economic Buyer, Champion	End User, Economic Buyer, Champion	End User, Economic Buyer, Champion	End User	End User	End User	End User
Budget limits & other considerations	Constraints may include the current budget allocated to smart home devices or competing financial priorities	Customers may be influenced by existing brand loyalty or product compatibility	Budget needs to be balanced with expected returns	Payment terms, shipping costs, and warranties need to be considered	Payment should be secure, and multiple payment methods should be supported	Installation costs or technical skills required may influence the customer's perception	The product should deliver on promised value, otherwise, dissatisfaction might arise	High expectations can affect customer satisfaction if not met	Budget limits or competing financial priorities may affect repeat purchases	Customer advocacy programs can incentivize sharing
How much time will this stage take? (give a range)	At most 2 weeks	Few days	1 week	1 week	At most few hours	1-2 days	All the time	Some months	Variable	Variable
Action plan to accomplish stage	Provide educational content and resources to help customers understand the need and the benefits of a home energy management system	Maintain a strong online presence and provide comparison guides to demonstrate differentiation	Offer free demos	Ensure a seamless ordering process and provide transparent terms	Ensure secure and varied payment options	Provide a clear installation guide and offer optional professional support	Provide onboarding guides and offer tips for maximizing the value	Send follow-up surveys and encourage feedback for improvements	Promote add-ons or subscription services to complement the main product	Encourage user-generated content and offer rewards for referrals
Risks	Insufficient awareness or urgency around	Customer confusion due to a wide	Analysis paralysis due to over	Issues with shipping or unclear	Payment gateway issues or customer	complicated setup or incompatibility with	Low perceived value or	Misalignment between expectations and real-	Perceived lack of new features or	Lack of customer motivation to share

[illegible]

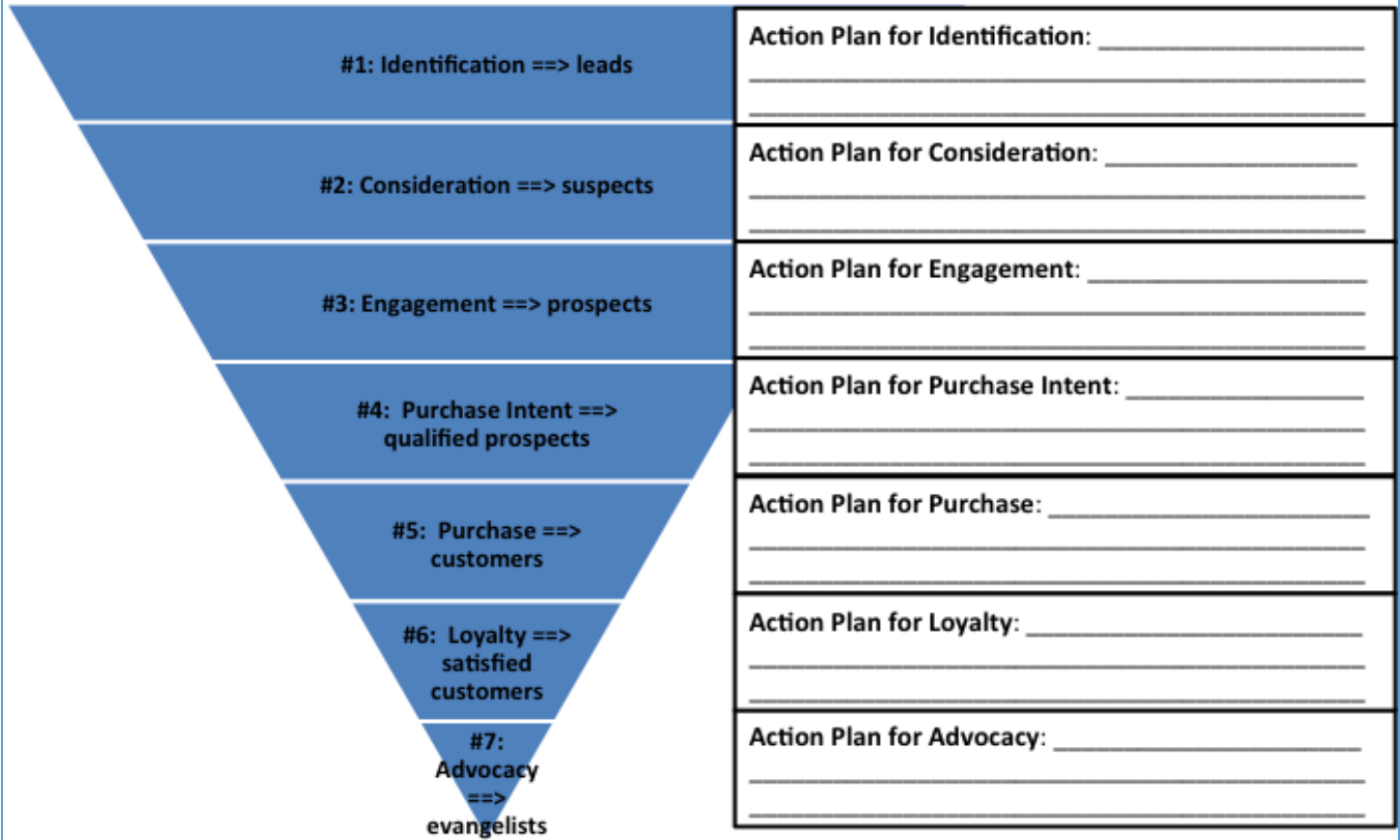
## Convert to a First Draft Sales Cycle Length Analysis Summary

### 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
<b>#1 – Identification:</b> Lead Generation <i>Output: Leads</i>	n/a	At most one month
<b>#2 – Consideration:</b> Create Awareness to Potential Customers <i>Output: Suspects</i>	<i>#1 - Determine Need &amp; Catalyst to Action &amp; #2 - Find Out about Options</i>	Few weeks
<b>#3 – Engagement :</b> Develop Initial Dialogue Output: Prospects & <b># 4 – Purchase Intent:</b> Develop Interest to Intent <i>Output: Qualified Prospects</i>	<i>#3 - Analyze Options</i>	Few days, up to one week
<b>#5 – Purchase:</b> Close Deal & Pay <i>Output: Customers</i>	<i>#4 - Acquire Your Product &amp; #5 – Purchase: Close Deal &amp; Pay Output: Customers</i>	Less than a day
<i>Total time for sales cycle:</i>		Around one month, at most two

# First Draft Sales Funnel



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

The process to acquire a paying customer involves identifying a need for home energy management, generating leads, and raising awareness of the product's benefits. It then moves into engaging with potential customers to provide tailored recommendations, establishing trust, and ultimately closing the deal. By streamlining the sales cycle and providing strong customer support, the process ensures that customers find value quickly and remain satisfied.

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

The engagement phase is clearly defined, with a structured dialogue that ensures customers receive the information needed to make an informed purchase.

The awareness and educational strategies help to effectively guide customers toward understanding the value of smart energy management.

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

Installation and adoption of the system may require additional support and customer education to mitigate potential challenges and deliver promised value.