

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	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 (from the Full Life Cycle Use Case)	Notices inefficiencies or outdated info in legal research, realizes a better solution is needed.	Learns about RISO via LinkedIn, legal newsletters, bar events, peer referrals.	Compares features, pricing, ROI, trustworthiness of tools.	Requests a demo or signs up for a free trial.	Pays via subscription or firm procurement process.	Receives login details, sets up account and roles.	Uses AI tools to research case law, receive updates, generate documents.	Tracks time saved, research quality, and client response time.	Adds licenses, upgrades plan, explores advanced modules.	Shares product through legal networks, bar talks, and LinkedIn.
Who is involved from the DMU?	Lawyers, junior associates	Lawyers, tech-savvy colleagues	Partners, procurement	Lawyers, admin staff	Lawyer, finance contact	IT, admin staff	Lawyer, paralegals	Lawyer, managers	Admin team, firm partners	Firm leaders, influencers
Budget limits & other considerations	Frustration may not trigger budget planning immediately	Must be discoverable and credible	Tool must fit existing budget and meet compliance/privacy needs	Clear value to justify trial/demo	Transparent pricing, contract terms needed	Quick setup minimal IT support preferred	Must prove efficiency and trust quickly	ROI should be measurable within weeks	Budgeting cycle affects scaling	Advocacy depends on satisfaction level
How much time will this stage take? (give a range)	1–2 days	2–3 days	5–7 days	Same day	1–2 days	Few hours	Daily/weekly use	2–4 weeks	Quarterly	Ongoing
Action plan to accomplish stage	SEO content, newsletters, educational campaigns	LinkedIn Ads, bar association partnerships	Offer product comparisons, demos, case studies	Easy sign-up, demo booking automation	Subscription portal, procurement support	Guided onboarding, tooltips, tutorials	Ensure product stability and accuracy	Dashboards for performance metrics	Email nudges, usage reports, upgrade prompts	Prompt testimonials, speaking invites, referral bonuses
Risks	No urgency felt, “status quo” accepted	Lost among competitors or unknown	AI skepticism, fear of inaccuracies	Friction in sign-up or demo request	Delay in purchase approval	Setup complexity may lead to drop-off	Low adoption if UX or value isn’t clear	ROI isn’t obvious or measurable	Budget constraints, ROI doubts	Low advocacy or engagement
Risk mitigation strategy	Highlight pain points in messaging	Build brand authority with trust badges	Emphasize data accuracy and citations	Provide white-glove onboarding	Offer flexible pricing options	Simplify onboarding flow	Collect feedback, optimize UX	Show time-saving examples	Offer cost-benefit dashboards	Incentivize referrals, showcase power users
Misc.	Often triggered after audit or high-pressure task	Peer influence plays major role	Include compliance checklists	UX should mimic familiar tools	Address security concerns	Role-based access helps larger firms	Ensure platform updates are visible	Use Net Promoter Score (NPS) to track value	Usage-based pricing helps	Build community & recognition

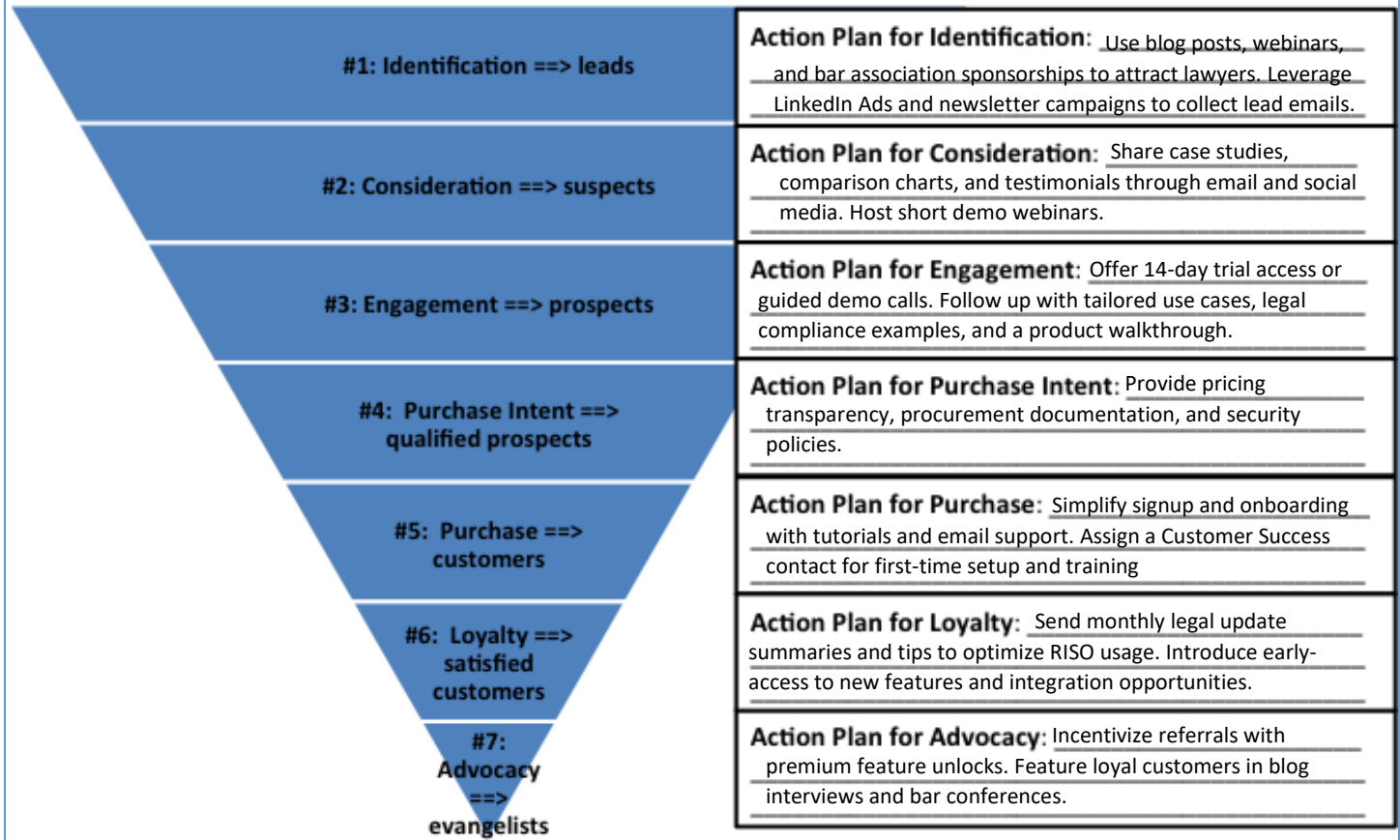
Convert to a First Draft Sales Cycle Length Analysis Summary

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 <i>Output: Leads</i>	n/a	2–5 days
#2 – Consideration: Create Awareness to Potential Customers <i>Output: Suspects</i>	#1 - Determine Need & Catalyst to Action & #2 - Find Out about Options	3–5 days
#3 – Engagement : Develop Initial Dialogue Output: Prospects & # 4 – Purchase Intent: Develop Interest to Intent <i>Output: Qualified Prospects</i>	#3 - Analyze Options	5–7 days
#5 – Purchase: Close Deal & Pay <i>Output: Customers</i>	#4 - Acquire Your Product & #5 – Purchase: Close Deal & Pay <i>Output: Customers</i>	1–2 days
Total time for sales cycle:		11–19 days (approximately 2–3 weeks)

First Draft Sales Funnel



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

The RISO customer acquisition process begins when legal professionals experience inefficiencies in traditional research workflows. They discover RISO through trusted legal channels, evaluate its AI-driven capabilities, and quickly adopt it through seamless onboarding and transparent pricing. Usage grows as value becomes evident, leading to repeat business and word-of-mouth referrals within legal communities.

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

We are confident in the early funnel stages, including problem recognition, awareness-building, and demo engagement. Additionally, the onboarding and usage stages are well-supported with automated workflows and customer success touchpoints.

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

We are concerned about the evaluation stage, where skepticism about AI accuracy and legal compliance may delay decisions. Additionally, the determination of value post-purchase can be ambiguous if ROI isn't immediately obvious, especially in smaller firms. We'll also monitor advocacy and referral behaviors, which may require stronger incentivization and trust-building.