

Venture Design Template

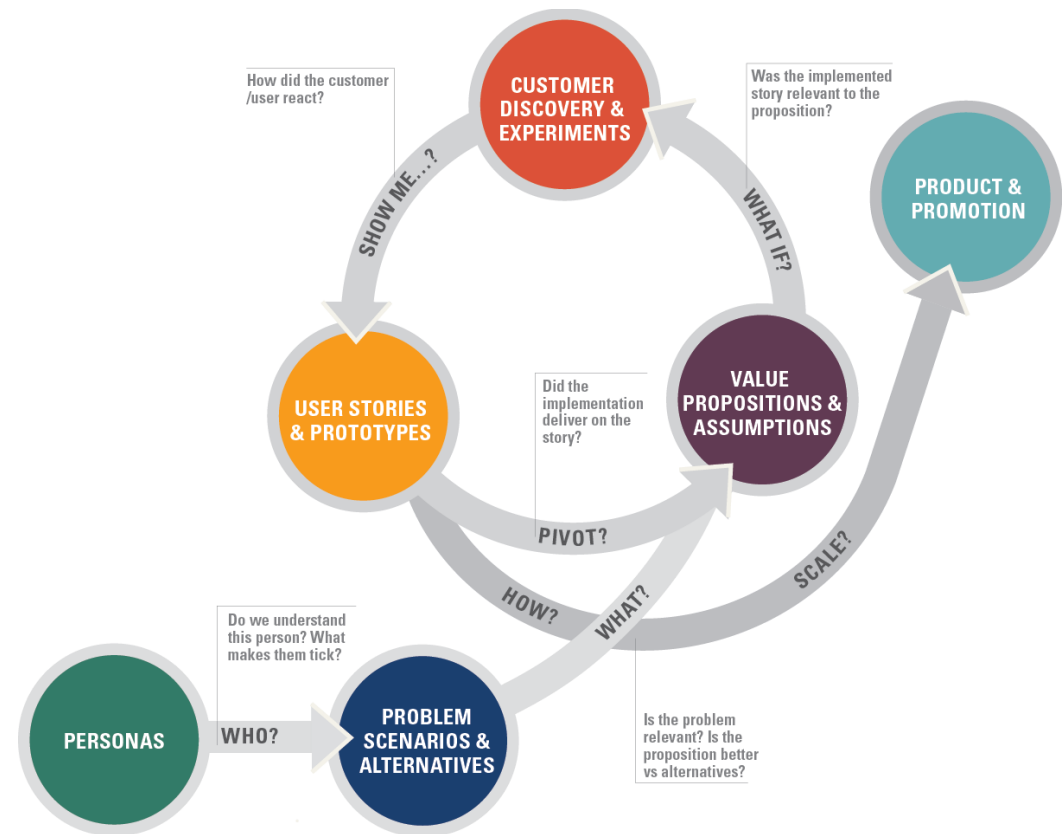


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Background & Introduction

What is this?

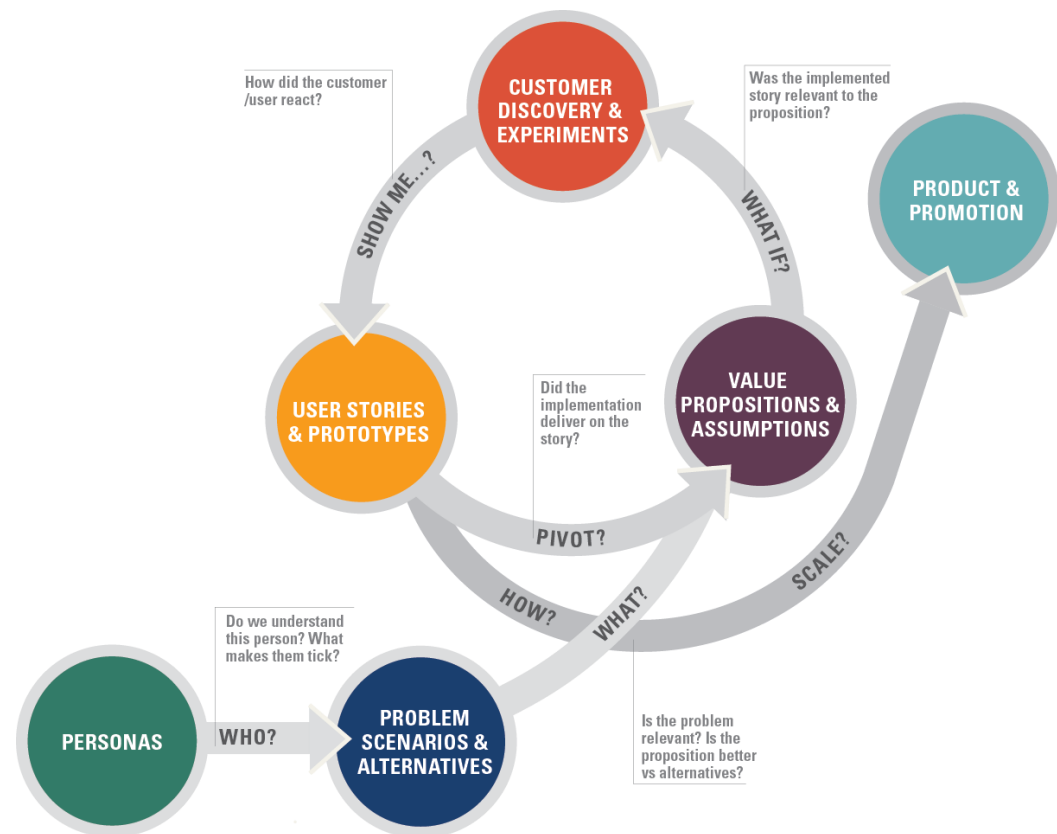
This template supports my [Venture Design](#) curriculum, a systematic process for creating new products and ventures. Venture Design draws on leading frameworks & tools like design thinking, Lean Startup, Business Model Canvas, and agile.

It's not just an amalgam. The key to use these frameworks effectively in the time you have is knowing what to do when, and that's the focus of Venture Design.

I may not be meeting you at the very beginning of your project, but I think you'll find that the framework also works well in reverse. containing tutorials, examples, and workshops.

Who's it for?

This template is for anyone who's looking to organize information about their product/market fit (or product/user fit if an internal IT project) using design thinking and lean principles.



How do you use the Google Doc?

I use (or will use) Google Doc's

If you have Google Doc's, you can just save a copy of this file into your own domain: File >> Make a Copy. If you don't have Google Doc's (Apps) and want it, you can see about setting up [here](#). That said you absolutely do NOT need to set up Google App's to use the template.

I don't use Google Doc's

If you do not have Google Doc's just go to File >> Download As and from there you can save it to MS Word, etc.

Are there any restrictions on using this template?

The template's primary purpose is to help practitioners create better products. You're free to use it and adapt it for internal purposes- building your company and/or product, basically.

You're not free to take it and re-post it elsewhere or create derivative work for general consumption outside the context of your company's internal operations. (You are, of course, free to link here to the original item- sharing is caring.) For the full terms and conditions, please see www.alexandercowan.com/legal.

0. What's the business?

First off, let's make sure we've defined what we think this business is about.

What is the positioning statement?

NOTES

This is a good way to do an early litmus test of how far along you are on formulating the business. You should, of course, feel free to come back to it and revise it often in these early phases.

Geoff Moore (of [Crossing the Chasm](#)) offers this syntax for a positioning statement:

For (target customer) who (statement of the need or opportunity), the (product name) is a (product category) that (statement of key benefit – that is, compelling reason to buy). Unlike (primary competitive alternative), our product (statement of primary differentiation).

EXAMPLE POSITIONING STATEMENT FROM [ENABLE QUIZ](#)

The positioning statement for Enable Quiz is [brackets added to help you connect it with the item below only]:

For [hiring managers] who [need to evaluate technical talent], [Enable Quiz] is a [talent assessment system] that [allows for quick and easy assessment of topical understanding in key engineering topics]. Unlike [formal certifications or ad hoc questions], our product [allows for lightweight but consistent assessments of technical talent].

[Just fill in the 'blanks', indicated by the brackets]

For [target customer] who [statement of the need or opportunity], the [product name] is a [product category] that [statement of key benefit – that is, compelling reason to buy]. Unlike [primary competitive alternative], our product [statement of primary differentiation].

]

1. Personas

In this section, you'll create a humanized view of your customer, be they buyer and/or user of your product. Turns out, this is the most actionable way to anchor just about any development activity.



[TUTORIAL & EXAMPLES](#)



[WORKSHOP](#)

[INSERT Name of Person - 'Andrea the Accountant']

Screening Question: [INSERT- This is a factual question or questions you'll ask a subject to validate that they, in fact, are at representative of your persona]

[INSERT PERSONA DESCRIPTION- *Be vivid; keep it real! What kind of shoes do they wear? How would you recognize them?*]

YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE
YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE YOUR TEXT HERE YOUR
Try to get a candid photo of someone (anonymous) w/ this persona
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Thinks	[INSERT- In your particular area of interest, what are the key thoughts, ideas this persona has?]
Sees	INSERT- [In your particular area of interest, what are the notable observations your persona is making?]
Feels	[INSERT- Regarding your particular area of interest, how do they really feel? What underlying emotions might be driving their point of view and behavior?]
Does	[INSERT- Regarding your particular area of interest, how do they really feel? What underlying emotions might be driving their point of view and behavior?]

2. Problem Scenarios, Alternatives, & Value Propositions

Here you'll lay out the specific problems you're going to solve for the user, be those habits, desires, or jobs to be done. You'll also identify their current alternative(s).



**PROBLEM
SCENARIOS &
ALTERNATIVES**



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[WORKSHOP](#)

Problem Scenarios	Current Alternatives	Your Value Proposition
[INSERT- What problems, needs does the persona have in your area?]	[INSERT- Instead of using your product, what do they do right now to solve this problem/meet this need?]	[INSERT- What product ideas do the problem scenarios and current alternatives give you?]

[add as needed]	[add as needed]	[add as needed]
[add as needed]	[add as needed]	[add as needed]

3. Customer Interview Guide

Here you'll lay out the specific problems you're going to solve for the user, be those habits, desires, or jobs to be done. You'll also identify their current alternative(s).



[TUTORIAL & EXAMPLES](#)

[PERSONA HYPOTHESIS](#)

Question Form	Your Questions HERE
Tell me about [yourself in the role of the persona]?	[your questions here]
Tell me about [your area of interest]?	[your questions here]

(area of interest is the general space that you're looking at- measurement of technical skills in the case of Enable Quiz, for example)	
Tell me your thoughts about [area]?	[your questions here]
What do you see in [area]?	[your questions here]
What do you feel about [area]?	[your questions here]
What do you do in [area]?	[your questions here]

PROBLEM HYPOTHESIS

Question Form	Example Questions from 'Enable Quiz'
How do you currently [operate in area of interest- if you don't have that yet]? OR Here's what I got on [x]- is that right?	[your questions here]
What's [difficult, annoying] about [area of interest]?	[your questions here]
What are the top [5] hardest things about [area of interest]?	[your questions here]
What are the top 5 things you want to do better this year in [general area of interest]?	[your questions here]
Why is/isn't [your specific area of interest on that list]?	[your questions here]

VALUE HYPOTHESIS & CUSTOMER CREATION HYPOTHESIS

For the most part, these need to be established with direct experimentation: concierge MVP's, pre-sales, landing page tests, etc. See here for more on that: [Your Lean Startup](#).

CLOSING AND MISCELLANEOUS

Question Form	Example Questions from 'Enable Quiz'
Casting a Line ("Anything else?")	[your questions here]
Housekeeping and Follow Up	[your questions here]

4. Value Propositions & Assumptions

Here you'll work through value proposition design and laying out the key assumptions you need to test for your new idea to become a successful innovation.



[TUTORIAL & EXAMPLES](#)



[WORKSHOP](#)

What is the product hypothesis?

[Product Hypothesis here in format:

'A [certain person] exists that I understand and can locate...

...and they have [certain problems that are important to them]...

...where they're currently using [certain alternatives]...

...and by [delivering our value proposition] we will be better enough that [consummation of target customer relationship- sale, usage, etc.]'

What are the key assumptions?

#	Priority *	Key Assumption	Needs Proving?	Experimentation
1	[add]	[INSERT- in format 'If we [do something] for [a certain persona] then [they will respond in some measurable way].']	[add]	[add]
2	[add]	[add]	[add]	[add]
3	[add]	[add]	[add]	[add]
4	[add]	[add]	[add]	[add]
5	[add]	[add]	[add]	[add]
6	[add]	[add]	[add]	[add]
7	[add]	[add]	[add]	[add]
8	[add]	[add]	[add]	[add]
9	[add]	[add]	[add]	[add]
10	[add]	[add]	[add]	[add]
11	[add]	[add]	[add]	[add]
12	[add]	[add]	[add]	[add]

13	[add]	[add]	[add]	[add]
14	[add]	[add]	[add]	[add]

* I suggest the following scale-

1: Pivotal assumption. If this is disproven, the venture needs to be canned or go through a fundamental pivot.

2: Child detail of a pivotal assumption.

3: Child of above.

(end truly pivotal assumptions)

4: Extremely important assumption. This assumption substantially affects key profit drivers.

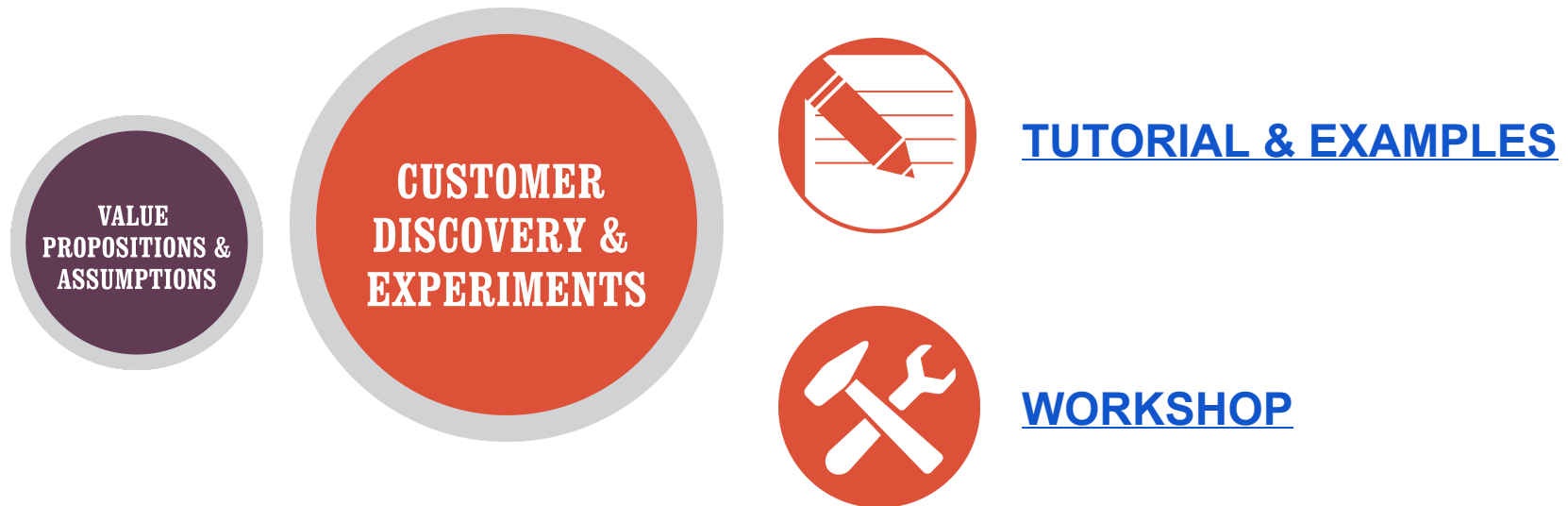
5: Important assumption. This assumption affects key profit drivers.

6-10: Tactical assumptions for incremental improvements in various areas.

X: Not sure of the priority of this assumption. Not being sure of the priority is much better than skipping it!

5. Experiments: Testing Your Assumptions

Here you'll lay out effective experiments to testing your proposition and make sure you're building something that someone wants.



NOTES

The following provide a pair of example experiments around our example company, Enable Quiz.

Enable Quiz- Concierge MVP

**What
assumption will
this test?**

This MVP will test our high-level Value Hypothesis:

If we offer HR managers at companies that hire a lot of engineers a lightweight quizzing app, they will convert to paid

	subscriptions after an unpaid trial.
How will we test it?	<p>We'll start with custom-built quizzes on Google Forms to assess the basic value of the product to the HR manager. We have recruited five HR managers from our customer discovery work who have agreed to participate. Each has 1-2 open positions where we have custom-designed screening quizzes based on the specifics of the open position.</p> <p>The quizzes have been made available to the HR managers and we've finished 0 day/usability testing to validate that they know how to administer the quizzes and find the scores (which we post to a Google Doc for them after grading them by hand).</p>
What is/are the pivotal metric(s)?	Unpacking our high level assumption, we'd like to test-
What is the threshold for true (validated) vs. false (invalidated)?	<p>1: If we create position-specific quizzes for HR managers, they'll use them ~100% of the time and, after two positions, be willing to pay. For this, our metric is [quizzes administered]/[candidates interviewed].</p> <p>We'll measure [quizzes administered] based on the number of position-specific quiz forms we receive. We've added a checkbox for 'this is a test' to help make it easier to discard junk forms. Also, there's a name or initial field which we use to correlate back to the interviews. We screened the HR managers to make sure they have systematic calendaring on the interviews they do so that even if they don't keep track of the count of candidates, we can work with them after the fact to check the count.</p> <p>Our target threshold on this is 90%. Given the hand-help set up, etc., we're providing, if the quiz isn't compelling to the HR managers we've hand held such that they use it for most job candidates, then we'll likely need a substantial pivot.</p> <p>2: If the HR managers use the quiz, they'll send through <1/2 as many candidates. For this, our metric is a comparison on the portion of candidates screened out by the functional manager- baseline vs. with the quiz.</p> <p>This test will be of an approximation. Based on interviews with both HR & functional managers, around 2/3 of candidates are screened out by the functional manager based on some material deficit in skill set. We've provided a working Google Doc for HR managers to use in post-mortems for cases where they don't already have this. We'll check in with them weekly to (gently) work to keep this form up to date, but we expect only moderate upkeep of this.</p>

	<p>We'd like to see the ratio of candidates screened out drop to roughly 1/3. This may be aggressive particularly since we've erred on the side of 'easier' quizzes to avoid false positives (incorrectly screening out candidates with a possibly adequate skill set).</p> <p>3: If we offer the service at [x] price with [y] supplemental assistance, companies that hire a lot of engineers will pay [z]. We will measure this by our ability to sell a package where we charge them \$100 for a subsequent custom-created quiz.</p> <p>We believe this is a better test than a pre-pay for the service since we think such a transaction for a few-hundred dollars would be difficult/not adequately compelling for an HR manager to sell internally.</p> <p>We'd like to see at least 50% of the subjects opt for a subsequent quiz, assuming success on the above two tests.</p>
What will you do next if the result is true? False?	<p>If all three tests validated, we will proceed with a 1.0 of the Enable Quiz software, limited to just a few specific topics (see experiment below for decision-making on that).</p> <p>If 1 & 2 only pass, we will consider the circumstances and reasons for that and review price point, purchaser, and, likely, the actual value proposition itself.</p> <p>If no tests pass, we will step back and consider the a) whether a different take on the value proposition might be relevant and b) whether the problem is truly important.</p>
How much time, money will it take to set up?	<p>Based on the current 5 technical topics we estimated that total set up for all 5 subjects will involve:</p> <ul style="list-style-type: none"> - 20 hours of work by our product lead to set up, user test, and document (for user) the quiz infrastructure on Google Forms - 40 hours of work by our technical lead to formulate and validate (with subjects) the quiz questions across the 5 subjects
Roughly, what will it take for each individual test?	<p>For each subject (5), we think it will take our product lead:</p> <ul style="list-style-type: none"> - 3 hours for initial Q&A and onboarding (including travel, etc.) - 3 hours across the quizzing to answer misc. questions - 3.5 hours to grade the quizzes (assuming 20 quizzes/position) - 1 hour of misc. follow-up by our technical lead
Roughly, how	<p>The interview cycle runs for 3-5 weeks after which we expect to have a full set of results on-hand.</p>

long will it take
for each test to
run and
produce
definitive,
actionable
results?

Enable Quiz- AdWords MVP

What
assumption will
this test?

This MVP will test our assumption about which technical topics are most promising for our hypothetical 1.0. There are many to choose from, and our intuition is that the right topics will a) by popular/in demand with employers b) overlap with the market we can reach and c) be affordable with regard to keyword phrases.

How will we test
it?

We have assembled a list of popular topics and workable keyword phrases 'hire [Ruby] developer', etc. and plan to run comparative Google AdWork campaigns to determine the top 10 most promising topics.

What is/are the
pivotal
metric(s)?

The pivotal metrics here are-
1: Absolute click-through-rate (CTR)
After a few iterations, we'd like to see a **CTR of 2%** on any topic we consider. Below this, we're not sure our current assumptions on our Customer Creation Hypothesis hold together. We'd like to see at least ~100 impressions on each iteration, with an estimate of 2 iterations/topics (this is a blend since we're planning to use similar patterns across topics).

What is the
threshold for
true (validated)
vs. false
(invalidated)?

2: Comparative CTR
Beyond this, we'll initially rank topics by CTR.

What will you
do next if the
result is true?
False?

If true, we will pursue a 1.0 of the product with the top 10 topics.

If false in that none of the CTR's are >2% after we feel we've tested a reasonable set of alternative keywords and ad+landing page combo's, then we'll a) revise our Customer Creation Hypothesis and consider alternative Channels and b) pursue an alternative assessment strategy (example: looking at job postings for target customers).

How much time, money will it take to set up?	Setting up and tuning the campaign (including AdWord & landing page creation and iteration) will take: <ul style="list-style-type: none">- 20 hours by our product lead- 20 hours by our 'growth hacking'/marketing contractor, costing \$1,600
Roughly, what will it take for each individual test?	The above includes both set up and our estimate on tuning. After that, we should have a usable set of results.
Roughly, how long will it take for each test to run and produce definitive, actionable results?	Based on search frequency of our preliminary keywords and the need to iteration, we think we'll need 10 days for each test to run.

[EXPERIMENT NAME]

What assumption will this test?	[Add. You'll probably want to link to something above (Assuming it's not a heading, you can make the assumption link-able with Insert>>Bookmark and then create the link here with Insert >> Link.)]
How will we test it?	
What is/are the pivotal metric(s)?	<p>[Add. If the experiment is supposed to produce some kind of definitive result, this should probably be quantitative.</p> <p>If it's a discovery exercise, then probably not. If not, skip the next item on thresholds, but the remaining items will help you focus, plan, and manage the discovery engagement.]</p>
What is the threshold for true (validated) vs. false (invalidated)?	<p>[Add. Even if you're <i>totally unsure</i> it's still good to take a position on this.</p> <p>That may sound arbitrary or even wasteful, but in practice if you don't get on the deciding-with-metrics-train someplace, it will probably pass you by. If you find your threshold is off (ex: a different threshold constitutes success) then it's perfectly OK to explicitly change your threshold.</p> <p>The point is to get on the train.]</p>
What will you do next if the result is true? False?	<p>[If true/validated, we will then ... which will move us toward our goal of ...]</p> <p>[If false/invalidated, we will then ... which will move us toward our goal of ...]</p>
How much time, money will it take to set up?	<p>[To set up the experiment it will take:</p> <ul style="list-style-type: none"> - [\$] and [y] hours of [type of work by type of person] - [\$] and [y] hours of [type of work by type of person] <p>]</p>
Roughly, what will it take for each individual test?	<p>[For each test which is [x], it will take:</p> <ul style="list-style-type: none"> - [\$] and [y] hours of [type of work by type of person] - [\$] and [y] hours of [type of work by type of person] <p>]</p>
Roughly, how long will	[Each test will take roughly [x time] to produce results...]

it take for each test to
run and produce
definitive, actionable
results?

6. User Stories & Prototypes

Here you'll translate what you've learned and what's right for the product into testable narrative you can use to drive high quality collaboration with your (agile) development team..



**USER STORIES
& PROTOTYPES**



[TUTORIAL & EXAMPLES](#)



[WORKSHOP](#)

User Stories

[PLACE YOUR EPIC STORY HERE] [copy and paste this heading and table as needed for multiple epic + child story sets]

Story	Test Cases
[add]	[add]

[add]	[add]
[add]	[add]
[add]	[add]
[add]	[add]
[add]	[add]
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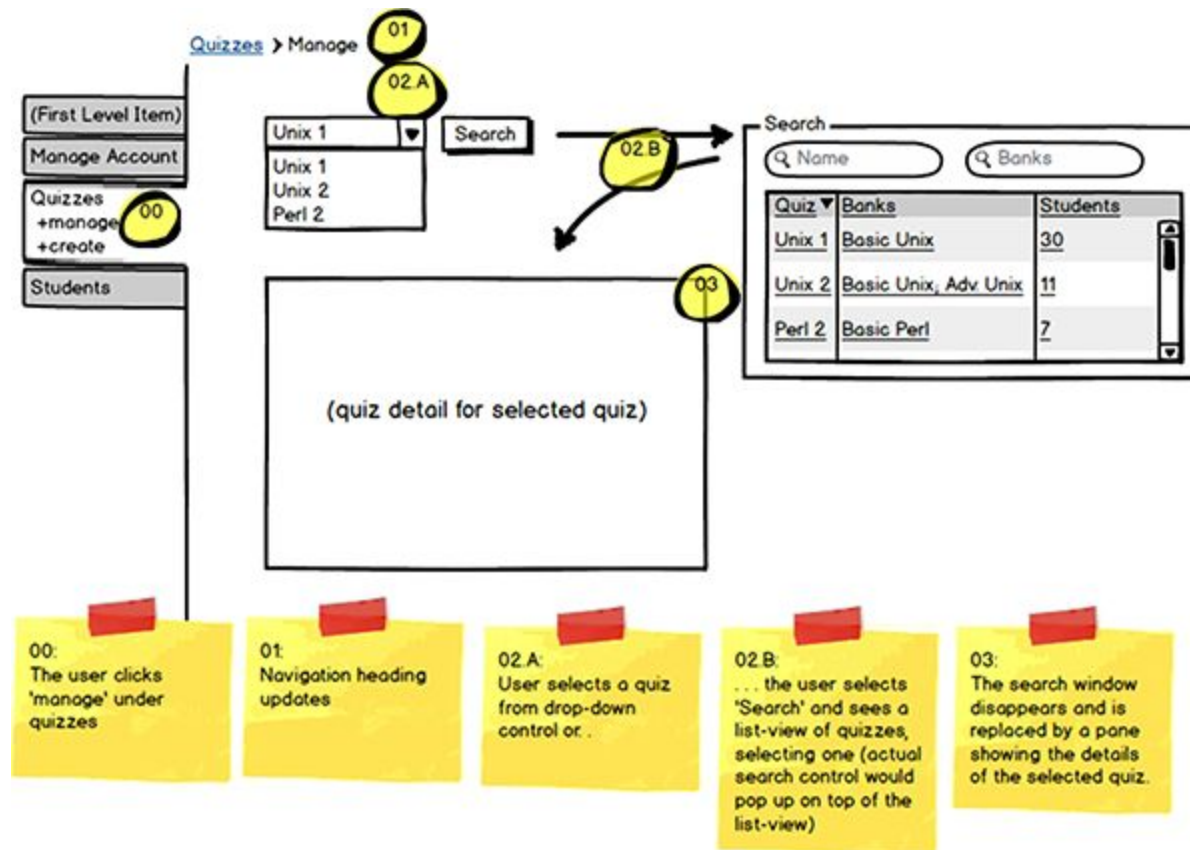
Prototypes

Do we really know what we want? Can we describe it with wireframes and prototypes?

NOTES

Below you'll find an example and notes. For more on this, including a tutorial and the Balsamiq source with the rest of the examples, see: [CREATING YOUR FIRST PROTOTYPE IN 30 MINUTES](#).

Thinking through a few of our stories at Enable Quiz, I (Andrew) sketched out the following idea for navigation and a few of the key controls:



... see this item if you'd like to see the full tutorial and the example Balsamiq files:

[CREATING YOUR FIRST PROTOTYPE IN 30 MINUTES.](#)

How do we test our user interface?

(see Appendix B- Usability Testing)

7. Business Model Canvas

What's the business model?

NOTES

At the foundation of your venture should be your personas & problem scenarios: what is your point of view on the customer and what they want? At the operational core, you have lean style experimentation- an ongoing evidence-based innovation process for both product and promotion. The Business Model Canvas (not mentioned in the items above) is a good way to articulate your business model and the table below shows resources for that. User stories & test cases then guide your executions on product and promotion. These items together provide a high-functioning set of tools and explicit, sharable definitions of what you're doing.

If you then need to write a traditional business plan or investor pitch for a certain audience, go ahead and do that. Just don't make the mistake of having that be your core item for managing the business.

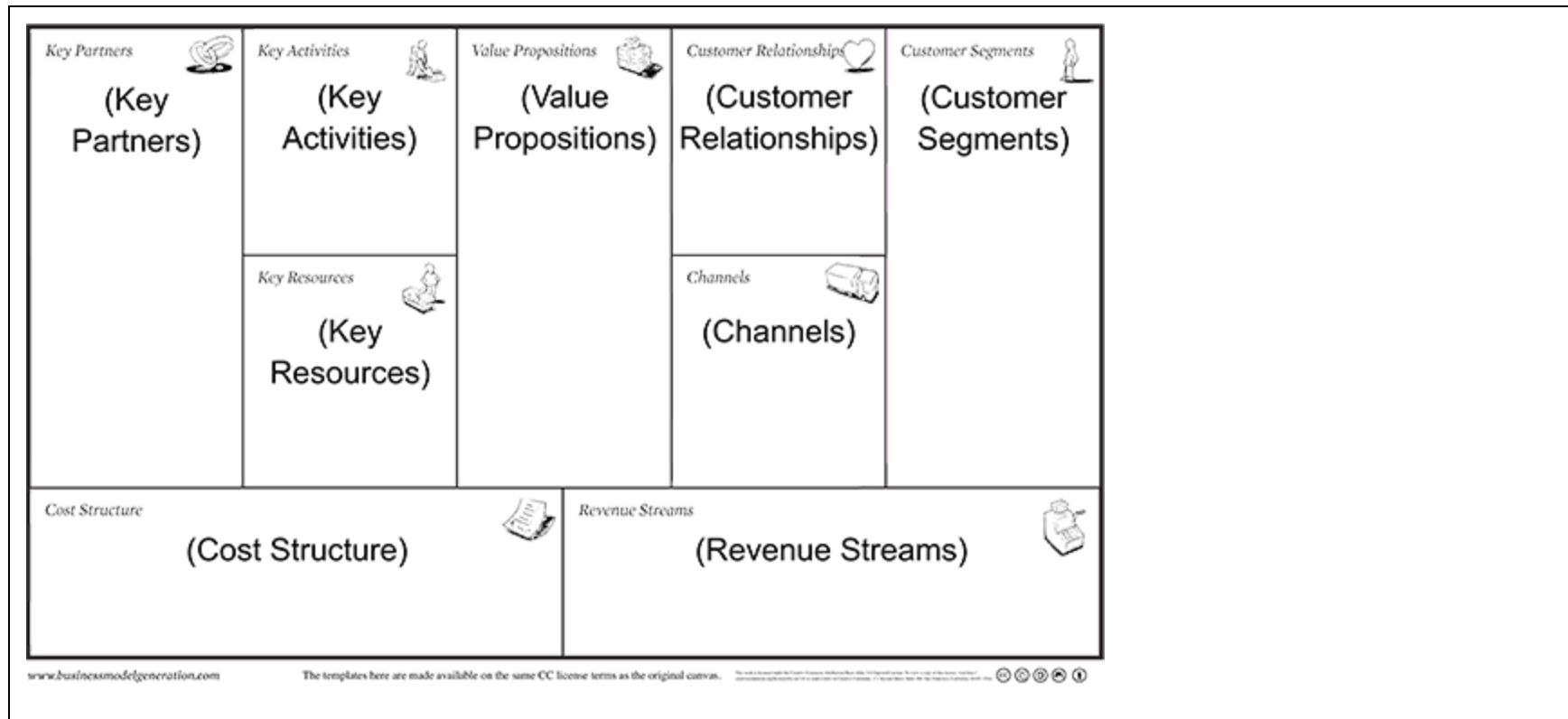
Here are a few items that will help you in this area:

TUTORIAL
[BUSINESS MODEL CANVAS](#)

This links to a page that has a tutorial and a few different templates (PDF, Omnigraffle, Google Doc's/PPT) for creating your business model canvas.

TEMPLATE
[BUSINESS MODEL CANVAS](#)

This is a template in Google Doc's Presentation format.



8. Economics & Financing

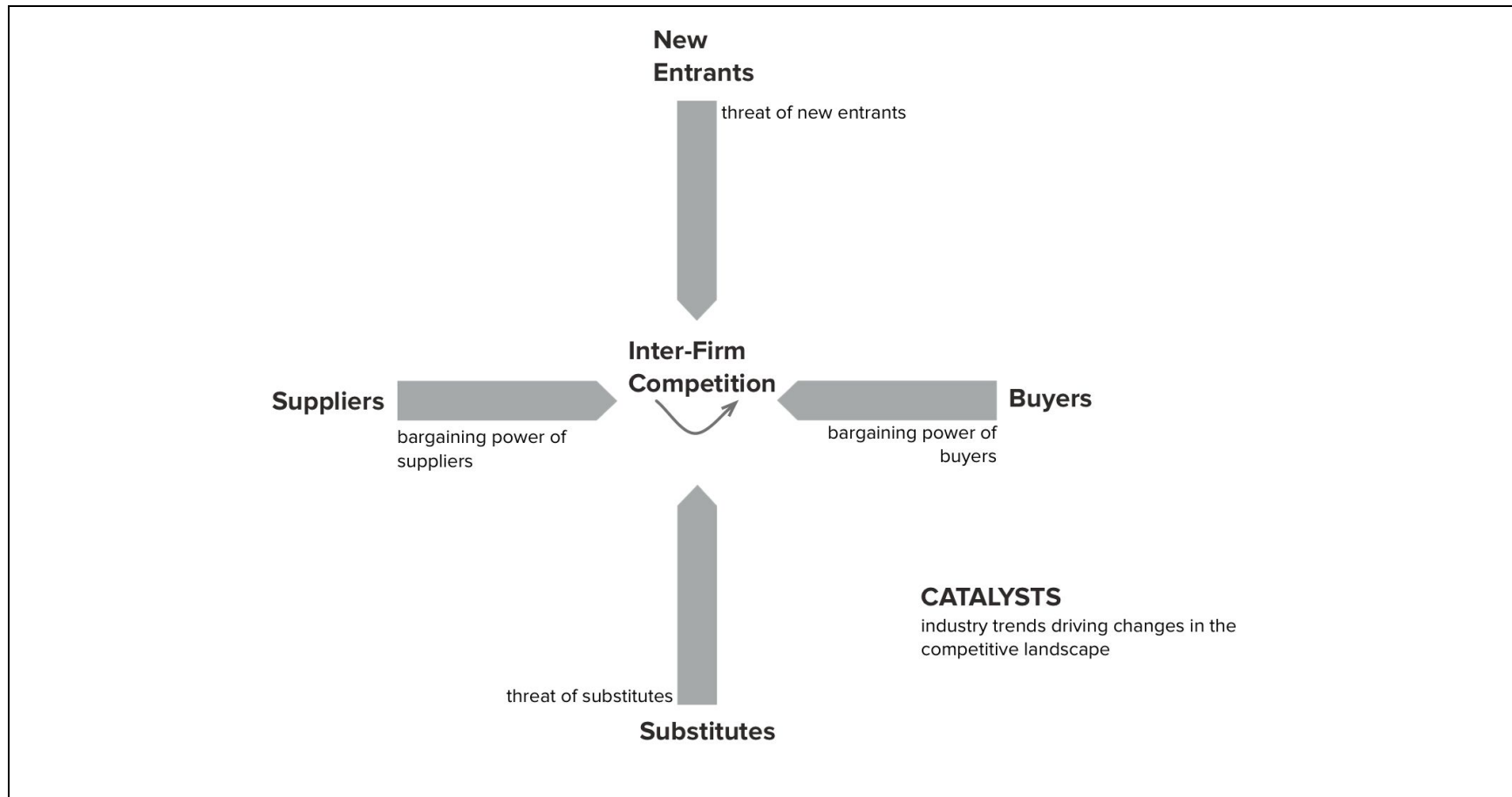
NOTES

Shortly this will have an overview of a lean financial model. Right now that's in 'Coming Soon' status. When it's up, the item will be online here:
[LEAN FINANCIAL MODEL](#).

9. Competitive Environment

NOTES

Shortly this will have a template for doing the Five Forces analysis. For now, please see this tutorial: [FIVE FORCES TUTORIAL](#).



Force	Notes
Threat of New Entrants	[add]
Threat of Substitutes	[add]
Bargaining Power of Buyers	[add]

Bargaining Power of Suppliers	[add]
Intensity of Competitive Rivalry	[add]

Appendix A: Customer Discovery Notes

Visit [Place, Date+Time] (copy as needed)

AUDIENCE (Name? Company? Do they map to a persona?)	[add notes]
VENUE/CIRCUMSTANCE (Where? Why?)	[add notes]
NOTES ON THE PERSONA (What was on their A-list? What were they like? Think-See-Feel-Do?)	[add notes]
NOTES ON PROBLEM SCENARIOS (Which ones did they have? What alternatives? What value propositions might resonate?)	[add notes]
INSIGHTS ON PERSONAS & PROBLEM SCENARIOS (How did the interview prove or disprove key assumptions on your personas and problem	[add notes]

scenarios? How else did they change your point of view)	
OTHER INSIGHTS (Right them down ASAP after you have them! Otherwise, you'll probably forget.)	[add notes]

Appendix B: Usability Testing

For background on what this is and how to use it, please see the section [Usability Hypothesis in the Customer Discovery Handbook](#).

Enable Quiz- Exploratory Suite I

Objectives & Methods

There are three general types of tests:

- Exploratory: for learning about customer problem scenarios in greater detail, sometimes with a paper or working prototype
- Assessment: for testing the usability of an early direction on product implementation
- Validation: for later stage final testing of an implementation

This test suite is exploratory and we're preceding the user testing with customer discovery interviews from [Appendix A](#) to deepen and align our view of personas and problem scenarios with the exploratory test results.

Product Version

We'll be using version [0.1] of the product for this exploratory test. [NOTE: They could easily be using paper or PowerPoint prototypes as this stage as well]

Subjects

Since enabling the HR manager persona to be more effective is central to our value proposition, our target weighting of subjects should reflect that. An ideal total and mix of subjects would be:

[Helen \(or Hank!\) the HR Manager](#) 4

Frank the Functional Manager 1-2

The screening question for both these subjects type are-

[Helen \(or Hank!\) the HR Manager](#)

How many technical job candidates did you screen in the last month?

Research Composition

#	Item	Duration (min.)	Notes
1	Intro. & Explanation	5	Here we will explain the objectives of the test and the parameters of their participation. We'll also obtain the designated release & consent form*.
2	Discovery Questions	20	Using the interview guide, we'll spend a few minutes to discovery to improve our personas, problem scenarios and user stories.
3	Test Tasks	15	We'll introduce the test scenario and then ask them to complete the Test Items.
4	Post-Test Debrief	5	Make sure we ask if it is OK to follow-up with additional questions.

Pre-Session Checklist

#	Item	Notes
1	Make sure have written versions of discovery and test questions to refer to	
2	Make sure test instance is up and functional	- log in - make sure app is on starting page
3	Make sure recording equipment* is up and functional	

Session Design

Intro

Thanks for making time to take part in our study. My name's [name] and this is [observer]. [Explain participation and deal with consent form/obtain written consent]*

We'll be using a test guide through the rest of this, so I hope you won't mind me referring to that.

We're here to learn about [an early version of a solution that allows HR managers to assess the technical skill set of a job candidate through an online quiz].

I'm going to ask you some questions and give you some tasks. Feel free to think out loud if you're comfortable with that. We're not here to test you and there are no wrong answers. Our results just help us better understand our product and its audience.

The session will take roughly [40-60] minutes.

Do you have any questions before we start?

Test Items

#	Research Objective	Est. v. Actual (min.)	Notes
1	Exploratory Intro	5	<u>MODERATOR GUIDE</u> Let's say your job is to create one of these quizzes for an open position. Here's a description of the position [Provide them sample job description and let them review.]. Let me know when you've finished reviewing it and if you have any questions. <u>OUTPUT</u> Validation that the subject understands their goal and the job description, roughly as well as they would in their current position.
2	Assess primary navigation for new quiz creation	2	<u>MODERATOR GUIDE</u> Let's say you want to create a new quiz. What would you do? <u>OUTPUT</u> Assessment of primary navigation for new quiz creation
3	How are we doing on this user story: As an HR manager, I want	5	<u>MODERATOR GUIDE</u> Tell me what you think you're seeing here?

	to match an open position's required skills with quiz topics so I can create a quiz relevant for candidate screening. ?		Let's say you wanted to choose a set of quiz topics for the open position you just reviewed. Show me how you'd do that? <u>OUTPUT</u> An assessment of the user's relationship to the available affordances and their appropriateness to the current user narratives and tasks.
...

NOTES ON TAKEAWAYS

Personas & Problem Scenarios	[...]
UI and User Stories	[...]

Post-Test Debrief

- Thanks so much. We'll be using this to make the product and solution stuff like documentation better.
- Would you mind if we send you follow-up questions?
- (if you're giving them some kind of tangible thank you, make sure that gets done)

* I don't supply legal advice on this site and I don't warrant these notes as fit for legal compliance. As well it should be, recording individuals is subject to various laws and regulations depending on who you are, who they are, where you are, and how the recording will be used and stored (among other factors). It's important that you get advice from your legal counsel and maintain transparency and applicable compliance with your subjects. At a minimum, this means securing written releases for the recordings and making sure that the recordings are stored and accessed securely (if you store them at all). Regarding releases and consent, your specific compliance requirements will vary, but here are a few sample consent forms from US institutions:

[Usability.gov](#)

[Indiana University](#)

FOR THE FULL SET OF EXAMPLES & DESCRIPTION, SEE: [USABILITY TESTING IN THE CUSTOMER DISCOVERY HANDBOOK](#)

[Company Name] [Type of Test {Exploratory, Assessment, Validation}] Suite [#]

Objectives & Methods

[describe]

Product Version

[define]

Subjects

[describe- link to personas above if at all possible; this will help you]

Research Composition

#	Item	Duration (min.)	Notes
1	[...]	[...]	[...]
2	[...]	[...]	[...]
3	[...]	[...]	[...]
4	[...]	[...]	[...]

Pre-Session Checklist

#	Item	Notes
1	[...]	[...]
2	[...]	[...]
3	[...]	[...]

Session Design

Intro

[everything you want to explain to the participant; be sure to obtain legally compliant consent and release as needed]

Test Items

#	Research Objective	Est. v. Actual (min.)	Notes
1	[...]	[...]	<u>MODERATOR GUIDE</u> [...] <u>OUTPUT</u> [...]
2	[...]	[...]	<u>MODERATOR GUIDE</u> [...] <u>OUTPUT</u> [...]
3	[...]	[...]	<u>MODERATOR GUIDE</u> [...] <u>OUTPUT</u> [...]

...

NOTES ON TAKEAWAYS [copy and repeat this section for each subject]

Personas & Problem Scenarios	[...]
UI and User Stories	[...]

Post-Test Debrief

[describe]

Appendix C: Chain of Relevance Check-In

The purpose of this exercise is for the practitioner of [Venture Design](#) to diagnose and focus their executions (be those product or promotion), and decide where and how to best invest their time and effort on subsequent iteration. Here are a few example questions:

Who were we doing this for?
What makes them tick?

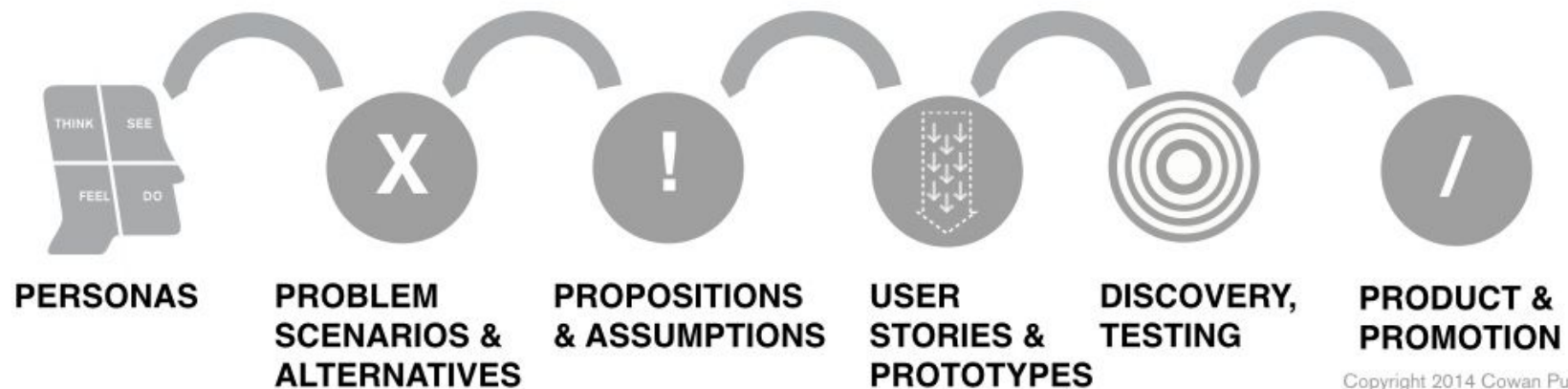
What problem were we solving?
Was it important?
Better vs. alt.?

What were the key propositions?
Assumptions?

What understanding were we implementing?

Did our test predict our outcomes?
Why/not?

Did anyone care?
Like it? Use it?
Respond to it?



Remember, one of the handy things about a Google Doc is the ease of interlinking information (vs. repeating it). You can link to current work (personas, etc.) in your current Venture Design with 'cmd + k' (Mac) or 'Insert >> Link'.

Project Check-In Template

This template is for a quick check-in as you're focusing your work toward some future output, be it a product or promotional iteration.

Item	Notes on Diagnosis
PERSONA CHECK Can we find 10 people that will love the product? Could they lead to 100 more? Then 1,000? Do we know how they relate to our area?	[Does the customer exist and do you know them? An example for Enable Quiz notes here might be: <i>The HR Manager, Functional Manager pairs exist at nearly all the companies where we've done discovery. The HR Manager generally wants to do more and the Functional Manager generally wishes they could do more on recruiting.</i>]
PROBLEM CHECK Does our problem matter enough? Do we hear it as a response to open-ended questions? Do we understand the alternatives in detail?	[Is your problem on their A-list? An example for Enable Quiz notes here might be: <i>We don't hear 'screening candidates' as an answer to 'What's hard about being an HR Manager' but we do hear it from both personas consistently in answer to 'What's hard about the recruiting process for engineers?'].</i>
VALUE HYPOTHESIS CHECK Do we have a tightly defined proposition?	[You'll struggle (read for startup: never) rise above the noise floor if you're an interesting thing to potentially lots of people vs. a bullseye for at least a few people. An example for Enable Quiz notes here might be: <i>Our core value hypothesis is: If we offer HR managers at companies that hire a lot of engineers a lightweight quizzing app, they will convert to paid subscriptions after an unpaid trial.</i> <i>We think this is the right scope and focus to deliver on the problem and loans itself to rapid, high-value testing (see next item).]</i>
VALUE DISCOVERY CHECK How can we test it in the next 48 hours?	[The best tests are quick, creative, and aligned to where you are. An example for Enable Quiz notes here might be: <i>We think a concierge test with quizzes on Google Doc's will allow us to a) test the core value hypothesis and b) better understand the whole customer/customer team interaction with the hypothetical product. 'A' is the most important for obvious reasons but we also have a lot of learning to do on the actual contours of</i>

	<i>the solution.]</i>
PRE-DEV CHECK Do we really need SW to move forward? Are we ready to narrate what the project needs? Test it often to avoid waste?	<p>[Make sure you can articulate all substantial customer interactions with the product- not just the general arc of what the product's supposed to do. The Enable Quiz in the examples above is <i>NOT</i> ready to built software. Let's say they've validated their value hypothesis and learned enough about the quizzing process to build software. One of their epic stories might be:</p> <p><i>'As the HR manager, I want to create a screening quiz so that I can understand whether I want to send possible recruits to the functional manager.'</i></p> <p>They've defined the building blocks they need for this and looked at comparables and UI patterns. Can you describe the functional experiences you want the user to have at least at this level of detail?.]</p>

Post-Mortem Template

Item	Notes on Diagnosis
What was the execution and what constituted success/validation? What actually happened?	<p>[If you were testing a feature pre-release, this would be the customer outcomes you hope to see. For instance, if Enable Quiz was testing a new interface for quiz creation, their answer might be:</p> <p><i>We're building a new quiz interface and we hope to see 90% of HR Manager users creating their first quiz within 7 days without contacting support.</i></p> <p><i>Out of [n] signup's, [x%] of our HR Manager users creating a working quiz within [y] days, constituting [validation, invalidation] of our current execution]</i></p>
Did our testing predict our outcomes?	<p>[At a high level, I like to divide up testing into work that delivers on three main buckets- Persona & Problem Hypothesis: Discovery interviews & observation. Value Hypothesis: MVP & other product proxy testing. Usability Hypothesis: Product usability against specific (supplied) goals. For more, see the 'Customer Discovery Handbook'.</p> <p>Depending on your execution, you may wish to take note on your work of against any or all of these.</p> <p>For example, if Enable Quiz had validated their persona, problem, and value hypotheses and was principally focused on onboarding customers out in 'the wild', their answer might be:</p>

	<p><i>Persona Hypothesis: After interviewing dozens of subjects screening into the 'HR Manager' and 'Functional Manager' personas, we have converged on a consistent set of perspectives and points of view. Future re-segmentation is likely but for an initial offering, we feel we have a solid working validation of what drives these personas.</i></p> <p><i>Problem Hypothesis: Generally in response to broad questions about HR management and hiring by the HR managers and functional managers (respectively), we have consistently heard from HR managers that screening technical candidates is a top problem and for functional managers that spending enough time on recruiting is a top problem. Our current point of view is that this constitutes an adequate working validation of our pivotal problem scenarios.</i></p> <p><i>Value Hypothesis: We have run two MVP vehicles to test our value hypothesis. The first, a concierge MVP, was a set of custom-built paper quizzes for a sample of 5 HR managers involved in technical recruiting. Our 0 day test was to make sure we could create relevant quizzes against their job descriptions (check). Our 30 day test was to see how frequently the HR managers were actually using the quizzes. We knew this because they would email them to us for grading. Usage was in line with our expectations (around 75% of candidates). Our 90 day test was to see if the quizzes were driving better outcomes for their hiring. We're still monitoring these for a more definitive/controlled result but the initial results are positive.</i></p> <p><i>Usability Hypothesis: We moved from exploratory to assessment to (rough) validation testing with the 1.0 interface. 90% of the subjects were able to complete a quiz against an open position in validation testing.</i></p> <p>Testing vs. Actuals: <i>Our testing would have predicted that roughly [x%] to [y%] of the HR manager users would successful create a quiz. In the field, we were at [z%], which is a relatively [good, bad] rate of predictability and we plan to [look at the results more, as applicable].</i></p> <p>NOTE: Your work may have more gaps than this (hypothetical) firm. Don't feel like you have to have all these items nailed- the purpose of this exercise is to identify where you have your most important gaps in understanding and validation.</p>
What understanding we were implementing?	<p>[Here your job is to note the inputs- user stories and (possibly) wireframes. For Enable Quiz this might look something like:</p> <p><i>The user stories and prototypes we implemented against are in sections [X] & [Y] of the Venture Design. We feel these described the implementation reasonably well and [other ideas].]</i></p>
What were the key	<p>[Here your job is to make sure your proposition(s), the definition of what you're doing that's better enough</p>

propositions? Assumptions?	<p>than the alternative at solving user problems, is clearly laid out and linked to the previous items. Here's an example from Enable Quiz:</p> <p><i>The key proposition here was about the value to the HR manager of being able to better screen technical talent and how that would drive both the effectiveness and hiring outcomes for the functional manager. Generally, the assumptions regarding the usefulness of screening to the HR Manager are relatively well validated. The impact (and perception of that impact) and outcomes for the functional manager we're still investigating and testing. The specifics are available in the assumptions section.]</i></p>
What problem were we solving? Was it important? Better than the alternatives?	<p>[Here your job is to clearly lay out the problem scenario(s) and alternative(s) you're addressing. Here's an example from Enable Quiz:</p> <p><i>Our core problem area is the recruitment of technical talent. Under that problem, we're principally interested in problem scenarios around how HR managers screen technical talent at the front end of the recruiting process, where currently they use a patchwork of references and paperwork review (resume, etc.). For more detail see [section herein with problem scenarios].]</i></p>
Who were we doing this for and do we know what makes them tick?	<p>[Here your job is to make sure the above items connect backward and anchor in relevance to one or more personas, be those buyers and/or users of your product. Here's an example for Enable Quiz:</p> <p><i>We have two principal personas: Helen the HR Manager and Frank the Functional Manager. Helen's key motivation is to contribute more to one of her firm's key activities- technical recruiting. We think that our ability to help her do more through lightweight technical screening quizzes is what's pivotal to the purchase and use of our product.</i></p> <p><i>Frank the Functional manager will see substantial benefit once the product is in place in the form of less time wasted on non-qualified candidates and ultimately better recruiting outcomes.]</i></p>

Venture Design Submission (Classes)

This template for you to review the completeness of your submission and focus where you are on things and what has to happens next.

The left column, 'Items- Checklist', is just for you to run through your venture design and make sure everything's in there. The right column, 'Notes on Diagnosis', is for you to make notes on what you've updated and why. The questions in that column you can remove. They're a guideline on what to cover in your diagnosis.

Items- Checklist	Notes on Diagnosis
Persona :: Photos? :: Does the description reflect what you've learned about key facets of what makes them tick? Their day? :: Can you think of at least 5 examples of the persona? :: Does the 'Think' reflect the tension between how they'd like things to be vs. how they are now? :: Does the 'See' reflect the points of contact and influence you've observed? :: Does the 'Feel' speak to the emotional drivers that you think will motivate action? :: Do you know what the persona specifically 'Does' in your area of interest? How much/how often? :: Does your interview guide draw out the answers to the above? :: Does your day in the life shed light on key moments in	[How has your perspective on the persona evolved? What turned out to be important? How did your screener and interview guide work out? What would you/did you change? What would you most like to learn more about?]

<p>their day?</p> <p>:: Did you push yourself to test actionability of the persona with Google AdWord concepts?</p>	
<p>Problem Scenarios</p> <p>:: What are the important problem scenarios? Alternatives?</p> <p>:: How do they look when you think upward in terms of abstraction (why?) and downward (how?)?</p>	<p>[What problems turned out to matter vs. not? Are you able to tie all your user stories back to problem scenarios?]</p>
<p>Value Propositions</p> <p>:: Do you have VP's that deliver against the Problem Scenarios and Personas above?</p> <p>:: Do your Before & After storyboard(s) help you think about and communicate those propositions?</p> <p>:: Did you describe them in the Business Model Canvas (optional)?</p>	<p>[How has your view of the propositions evolved? What's important and likely to be valuable? How does that differ between segments (sides of a marketplace, for example) and personas?]</p>
<p>Your Project as Experiment</p> <p>:: What are your most important assumptions?</p> <p>:: How does your AIDAOR storyboard and journey map help you think through those assumptions?</p> <p>:: Are they framed in testable terms: If we [x == do something] for [y == persona] then they will [z == respond in a certain, measurable way].</p>	<p>[How has your view of the assumptions changed? Beyond your core Value Hypothesis of whether buyers/users will come, what others have emerged as important?]</p>
<p>Testing Motivation</p>	<p>[Based on what you know now, do you see better opportunities or ideas to test motivation before you (or the venture's principals) spend time and money on the venture?]</p>

<p>:: What experiments could you run and are they structured in the template with assumptions, methods, metrics, and post-experiment actions?</p> <p>:: What is the scrappiest thing you could do in the next 48 hours to test customer motivation? (Not that doing so is part of the assignment)</p>	
<p>Narrative Collaboration via User Stories & Wireframes</p> <p>:: Do you have epics and then child stories and test cases that describe them?</p> <p>:: Did you storyboard the key epics to get at detail?</p> <p>:: Did you pull applicable comparables and UI patterns to help you build on best practice for the key stories?</p> <p>:: Did you wireframe the key stories to think about implementation?</p>	<p>[How has your view of the specific customer narratives evolved? Do you think they're ready for implementation? What best practices do you think you can leverage to maximize existing behavior models on the part of the user? Do the user stories tie back to your work elsewhere? Do they tie back to your problem scenarios?]</p>
<p>Usability Testing</p> <p>:: Do you have an exploratory testing design that's anchored in user stories?</p> <p>:: Do your interactive wireframes support it?</p> <p>:: Have you tried it out? What insights did it yield?</p>	<p>[How has your view of how to execute the user testing evolved as you exercised your test suite (stories, wireframes, script, test design)?</p> <p>What changes, focal points did the user testing provide?]</p>

Desc. line 1	
Desc. line 2	
Display URL	
Notes to Self	

Appendix E Document Revision History

Table 1 Document Log

Date	By	Notes
Sept. 30, 2012	A. Cowan	first tracked version
Oct 7, 2012	A. Cowan	updates on using Google Trends
Feb 10, 2013	A. Cowan	updated title updated formatting convention small, misc. edits
Mar 15, 2013	A. Cowan	folded assumptions into main doc moved positioning statement updated, expanded example personas
June 27, 2013	A. Cowan	little clerical clean-up's
July 9, 2013	A. Cowan	structural clean-up's and updates
Aug 11, 2013	A. Cowan	added AIDA section, updates to customer discovery questions and field notes appendix
Aug 17, 2013	A. Cowan	added material on storyboards
Jan 10, 2014	A. Cowan	tweaked customer discovery questions: linked to core customer discovery hypothesis and switched up order a little
Mar 21, 2014	A. Cowan	misc edits updates on interview guide/customer discovery material
Aug 21, 2013	A. Cowan	various updates around the current Venture Design curriculum

(various in 2014)	A. Cowan	(didn't do a great job of tracking changes in 2014; learned that various users actually care about this in a material way; resolved to do better in 2015)
Jan 1, 2015	A. Cowan	changed page orientation to horizontal/landscape added new section 4 on user testing re-serialized applicable headings
Feb 1, 2015	A. Cowan	added new appendix C for 'relevance chain analysis'
Feb 17, 2015	A. Cowan	updated section on test-driven innovation/Lean Startup
Mar 11, 2015	A. Cowan	tactical edits on section 2 on lean, assumptions
Aug 28, 2015	A. Cowan	added screener to persona example and template
Dec 12, 2015	A. Cowan	removed examples, including just the links to that material integrated more of updated Venture Design iconography and terms