<buried\_wins\_findings\_criteria>

<definition>

<description>A Finding is a discrete, noteworthy observation or customer quote extracted from the response data table, which reveals a material issue, opportunity, or actionable insight for a B2B SaaS client. It stands out from general sentiment or codes because it is likely to influence executive decision-making or product/market strategy.</description>

<minimum\_requirement>A Finding should meet at least two of the following criteria</minimum\_requirement>

<priority\_note>The more criteria a record meets, the higher its priority as a finding</priority\_note>

</definition>

<evaluation\_criteria>

<criterion id="novelty">

<name>Novelty</name>

<description>The observation is new/unexpected for the client, challenging assumptions or established beliefs.</description>

<trigger\_question>Is this something the client has not previously recognized?</trigger\_question>

</criterion>

<criterion id="actionability">

<name>Actionability</name>

<description>The observation suggests a clear step, fix, or action the client could take to improve outcomes (e.g., change a process, add a feature, address a risk).</description>

<trigger\_question>Could this directly inform a roadmap item or go-to-market plan?</trigger\_question>

</criterion>

<criterion id="specificity">

<name>Specificity</name>

<description>The finding is precise, detailed, and not generic. It references a particular feature, workflow, market condition, or user group.</description>

<trigger\_question>Is this about a concrete product aspect, metric, or process?</trigger\_question>

</criterion>

<criterion id="materiality">

<name>Materiality</name>

<description>The finding has meaningful business impact—affecting revenue, customer satisfaction, retention, or competitive positioning.</description>

<trigger\_question>Does this affect a key business KPI or customer segment?</trigger\_question>

</criterion>

<criterion id="recurrence">

<name>Recurrence</name>

<description>The same observation (or near-identical quote) appears across multiple interviews or sources, suggesting a theme.</description>

<trigger\_question>Is this echoed by two or more stakeholders/roles?</trigger\_question>

</criterion>

<criterion id="stakeholder\_weight">

<name>Stakeholder Weight</name>

<description>The observation comes from a high-influence decision maker (e.g., C-suite, VP, lead buyer) or a critical user persona.</description>

<trigger\_question>Does the source matter to the client's business priorities?</trigger\_question>

</criterion>

<criterion id="tension\_contrast">

<name>Tension/Contrast</name>

<description>The finding exposes a tension, tradeoff, or significant contrast (e.g., "We love X, but can't use it because of Y"), revealing friction or opportunity.</description>

<trigger\_question>Does this highlight a dilemma, blocker, or gap vs. competitors?</trigger\_question>

</criterion>

<criterion id="metric\_quantification">

<name>Metric/Quantification</name>

<description>The finding is supported by a tangible metric, timeframe, or quantifiable outcome (e.g., "Churn increased by 15% after X change").</description>

<trigger\_question>Is there a number or business measure that makes this impactful?</trigger\_question>

</criterion>

</evaluation\_criteria>

<practical\_examples>

<context>B2B SaaS Context</context>

<example id="1">

<quote>Integration with Salesforce required a $20k custom build. We nearly dropped the project.</quote>

<criteria\_met>Specificity, Materiality, Actionability</criteria\_met>

</example>

<example id="2">

<quote>Three out of five buyers cited lack of SOC 2 compliance as a dealbreaker.</quote>

<criteria\_met>Recurrence, Materiality, Stakeholder Weight</criteria\_met>

</example>

<example id="3">

<quote>The onboarding process is the best we've seen—our team was live in two days.</quote>

<criteria\_met>Novelty, Metric/Quantification</criteria\_met>

</example>

<example id="4">

<quote>We're actively considering switching due to inconsistent API documentation, which slows our development sprints by a week every release.</quote>

<criteria\_met>Actionability, Specificity, Tension</criteria\_met>

</example>

<example id="5">

<quote>Churn rose 10% quarter-over-quarter after the UI redesign; users complained about hidden features.</quote>

<criteria\_met>Metric/Quantification, Materiality</criteria\_met>

</example>

<example id="6">

<quote>Product Marketers need the ability to self-serve reports—waiting on data teams costs us hours every week.</quote>

<criteria\_met>Stakeholder Weight, Actionability</criteria\_met>

</example>

</practical\_examples>

<analysis\_instructions>

<step number="1">

<action>Review each coded response record</action>

</step>

<step number="2">

<action>For each record, check how many criteria are met (from the list above)</action>

<conditions>

<condition>If a record meets at least two criteria, flag as a "finding"</condition>

<condition>If it meets three or more, mark as "priority finding"</condition>

</conditions>

</step>

<step number="3">

<action>For flagged findings, add brief justification</action>

<example>Referenced by 4 customers, affects revenue, specific to API performance</example>

</step>

<step number="4">

<action>Carry forward findings to the next step—pattern recognition and theme development</action>

</step>

</analysis\_instructions>

<training\_consistency>

<optional\_tools>

<tool>Provide analysts or prompt engineers with a "finding checklist"</tool>

<tool>Embed the criteria as system messages for your LLM</tool>

</optional\_tools>

</training\_consistency>

<reporting\_integration>

<finding\_eligibility>

<rule>Only findings (not all codes) are eligible for inclusion in the main deck of reports</rule>

</finding\_eligibility>

<traceability\_requirements>

<requirement>All findings must be traceable to source data</requirement>

<requirement>When possible, attributed to a specific participant role and deal status</requirement>

</traceability\_requirements>

<theme\_development>

<definition>Themes in reports are collections of validated, recurring findings</definition>

<labeling\_categories>

<category>Barrier</category>

<category>Opportunity</category>

<category>Strategic</category>

<category>Functional</category>

</labeling\_categories>

</theme\_development>

</reporting\_integration>

</buried\_wins\_findings\_criteria>