Lab2Market Week 1 Assignments

Ocean Technology Project

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1. Business Thesis & Value Proposition

Business Thesis & Value Proposition
Lab2Market Ocean Technology Project

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1. Business Thesis (Template 1)

> **"Our [ocean technology solution] helps [offshore operators, ship captains, and marine facility managers] who want to [improve operational safety and efficiency in harsh ocean environments] by [providing real-time monitoring, predictive analytics, and automated compliance reporting] and [reducing operational risk, increasing confidence in decision-making, and ensuring regulatory compliance]."**

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2. Business Thesis (Alternate Format - "X for Y so they can Z")

> **"We do [real-time ocean monitoring and compliance automation] for [offshore energy operators and maritime fleet managers] so they can [predict equipment failures before they happen and pass regulatory audits automatically], and ultimately [reduce downtime costs and eliminate career-ending audit failures]."**

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3. Value Proposition Components

Core Problem We're Solving
Ocean operations face a "trust and verification" gap: Traditional monitoring solutions don't provide the real-time data and automated compliance reporting needed in harsh, remote marine environments.

Customer Segments (Prioritized)

Primary: Offshore Energy Operators
- **Who**: Operations Managers, HSE Directors at offshore oil/gas platforms
- **Job to be Done**: Maintain 24/7 operations in harsh conditions while ensuring safety compliance
- **Functional Pain**: Equipment downtime costs $2M+/day; manual compliance reporting takes weeks
- **Emotional Pain**: Fear of audit failures, career risk, stress from managing remote teams

Secondary: Maritime Fleet Managers
- **Who**: Fleet Operations Directors, Ship Captains (Bulk carriers, container ships)
- **Job to be Done**: Navigate safely and efficiently while meeting IMO/Class society requirements
- **Functional Pain**: Weather routing inefficiencies, fuel waste, slow response to changing conditions
- **Emotional Pain**: Safety anxiety, regulatory pressure, reputation risk

Tertiary: Aquaculture Facility Managers
- **Who**: Farm Managers, Environmental Compliance Officers
- **Job to be Done**: Monitor water quality and environmental impact 24/7
- **Functional Pain**: Manual sampling is slow and incomplete; compliance reporting is labor-intensive
- **Emotional Pain**: Environmental disasters can destroy brand and livelihood

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4. Value Map (Problem -> Solution Fit)

| **Customer Pain** | **Our Solution** | **Value Delivered** |

|-----------------|---------------|-------------------|
| Equipment failure is unpredictable | Real-time sensor analytics with ML-based predictions | Preven
failures before they cause downtime |
| Compliance audits are manual and risky | Automated compliance reporting with immutable audit tr
| Pass audits in minutes, not weeks |
| Weather/ocean conditions change rapidly | Live environmental monitoring dashboard | Make
informed decisions in real-time |
| Remote operations = delayed response | Edge computing + satellite connectivity | Instant alerts ev
in remote locations |

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5. Unique Selling Proposition (USP)

**"The only ocean monitoring platform that combines real-time environmental data with automated
regulatory compliance--purpose-built for the harshest marine environments."**

What Makes Us Different

Competitor Type	**Their Approach**	**Our Advantage**
Traditional Ocean Sensors	Collect data but don't provide insights	We deliver actionable
intelligence, not raw data
Generic IoT Platforms	Not hardened for marine environments	We're built for salt, pressure,
and extreme temps
Manual Compliance Services	Slow, expensive, error-prone	Automated, instant,
blockchain-verified

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6. Business Thesis Testing Questions

Use these in your first 30 interviews to validate/invalidate:

Assumption 1: Pain Intensity
- "On a scale of 1-10, how painful is [equipment downtime / audit prep / weather uncertainty] for you
operations?"
- **Success threshold**: 7+ says "8 or higher"

Assumption 2: Current Solution Cost
- "What do you currently spend annually on [monitoring / compliance / risk mitigation]?"
- **Success threshold**: $500K+ (confirms budget exists)

Assumption 3: Decision Authority
- "Walk me through the approval process for adopting a new monitoring system. Who signs off?"
- **Success threshold**: Can identify the buyer (budget owner) in 8/10 interviews

Assumption 4: Willingness to Pay
- "If a solution could reduce your downtime by 50% and automate your audit reporting, what would
that be worth to you?"
- **Success threshold**: 8/10 say a number ? our target price ($100K+/year)

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7. Elevator Pitch (30 seconds)

> "Offshore operations lose millions when equipment fails unexpectedly, and compliance audits can
take weeks of manual work. We provide a real-time ocean monitoring platform that predicts

equipment failures before they happen and automates regulatory reporting--so operators can preve
downtime and pass audits in minutes instead of weeks. We're currently working with [X] offshore
operators to validate our approach."

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8. Next Steps for Validation

1. **Interview 10 offshore operators** to validate pain intensity
2. **Interview 10 maritime fleet managers** to compare pain points across segments
3. **Map the decision chain**: Who buys? Who uses? Who influences?
4. **Test pricing**: Show mock pricing slide to validate willingness to pay
5. **Identify early adopters**: Who feels the pain most acutely right now?

Note: This thesis is a HYPOTHESIS. Expect to pivot after your first 20-30 interviews based on
what you learn.

2. CRM & Interview Targets

Customer Discovery CRM & Interview Target Research
Lab2Market Ocean Technology Project

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1. Target Customer Segments (Prioritized)

Segment 1: Offshore Energy Operators * PRIMARY
Why this segment: Highest pain intensity, largest budgets, regulatory-driven

Target Titles	**Companies to Research**	**LinkedIn Search Terms**
VP Operations	Equinor, Shell, BP, Chevron, ExxonMobil	"offshore operations" + "director"
HSE Director	Subsea 7, TechnipFMC, Saipem	"health safety environment" + "offshore"
Platform Manager	ConocoPhillips, Aker BP	"platform manager" + "oil gas"
Asset Integrity Manager	Petrobras, Woodside Energy	"asset integrity" + "offshore"

Expected Pain Points to Validate:
- Equipment downtime costs ($2M+/day)
- DNV/ABS audit preparation burden
- Real-time monitoring gaps in harsh weather

Segment 2: Maritime Fleet Managers * SECONDARY
Why this segment: Similar regulatory pressures, established procurement cycles

Target Titles	**Companies to Research**	**LinkedIn Search Terms**
Fleet Operations Director	Maersk, MSC, CMA CGM	"fleet operations" + "maritime"
Marine Superintendent	Hapag-Lloyd, ONE (Ocean Network Express)	"marine superintendent"
Ship Captain (Bulk/Container)	Genco Shipping, Diana Shipping	"ship captain" + "bulk carrier"
Class Society Surveyor	DNV, Lloyd's Register, ABS	"surveyor" + "classification society"

Expected Pain Points to Validate:
- Fuel efficiency losses due to poor weather routing
- IMO compliance reporting complexity
- Crew safety concerns in severe weather

Segment 3: Aquaculture Facility Managers * TERTIARY
Why this segment: Emerging market, environmental compliance focus

Target Titles	**Companies to Research**	**LinkedIn Search Terms**
Farm Manager	Mowi, Ler?y Seafood, SalMar	"aquaculture" + "farm manager"
Environmental Compliance Officer	Grieg Seafood, Cooke Aquaculture	"environmental compliance" + "aquaculture"
Operations Manager	Cermaq, Scottish Sea Farms	"operations" + "salmon" OR "fish farm"

Expected Pain Points to Validate:
- Water quality monitoring gaps
- Environmental impact reporting for regulators
- Disease outbreak early detection

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2. Interview Target List (100 Total)

Week-by-Week Breakdown

Week	**Segment**	**Target #**	**Goal**
1-2	Offshore Energy	30	Validate pain intensity and current solutions
3-4	Maritime Fleet	30	Compare pain points and willingness to pay
5-6	Aquaculture	20	Test adjacent market fit
7-8	Regulators & Influencers	10	Understand compliance landscape
9-10	Follow-ups & Refinement	10	Deep dive with early adopters

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3. CRM Template (AirTable Structure)

Required Columns

Column Name	**Type**	**Purpose**	**Example**
Contact Name	Text	Full name	"John Smith"
Title	Text	Job title	"VP Offshore Operations"
Company	Text	Organization	"Shell Energy"
Segment	Single Select	Customer archetype	"Offshore Energy", "Maritime Fleet", "Aquaculture"
Role Bias	Single Select	Buying influence	"Buyer", "User", "Influencer", "Blocker"
LinkedIn URL	URL	Profile link	https://linkedin.com/in/...
Email	Email	Contact email	john.smith@shell.com
Phone	Phone	Contact number	+1-xxx-xxx-xxxx
Outreach Date	Date	When contacted	2026-01-20
Outreach Method	Single Select	Channel used	"LinkedIn", "Email", "Phone", "Referral"
Interview Status	Single Select	Progress tracker	"Not Contacted", "Reached Out", "Scheduled", "Completed", "Declined"
Interview Date	Date	Scheduled/completed date	2026-01-25
Pain Intensity (1-10)	Number	Self-reported pain level	8
Problem (Verbatim)	Long Text	THEIR words	"We lose $2M every time weather shuts us down"
Current Solution	Long Text	What they use now	"Manual weather reports + spreadsheets"
Current Solution Cost	Currency	Annual spend	$500,000
Key Insight	Long Text	Main takeaway	"DNV compliance is #1 priority, not cost"
Willingness to Pay	Currency	Budget range mentioned	$100,000 - $250,000
Follow-up Date	Date	Next action	2026-02-01
Referrals	Long Text	Who they recommended	"Jane Doe at BP, Mike at Equinor"
Tags	Multiple Select	Quick filters	"Early Adopter", "Skeptic", "Champion"

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4. Research Sources for Building Your List

LinkedIn Advanced Search
Filters to use:
- **Title**: "VP Operations", "Director HSE", "Fleet Manager"
- **Industry**: "Oil & Energy", "Maritime", "Aquaculture"

- **Location**: Norway, UK, Houston (TX), Aberdeen (Scotland), Singapore
- **Company Size**: 1,000+ employees (established budgets)

Industry Conferences (Check Speaker Lists)
- **Offshore Technology Conference (OTC)** - Houston, May 2026
- **Nor-Shipping** - Oslo, June 2026
- **Offshore Wind Europe** - Amsterdam, 2026
- **Aquaculture Europe** - Rotterdam, 2026

Industry Publications (Find Authors & Contributors)
- *Offshore Engineer* magazine
- *Maritime Executive*
- *Fish Farmer* magazine
- DNV/Lloyd's Register whitepapers

Alumni Networks
- Search your university's alumni database for:
- Ocean engineering graduates
- Maritime MBA programs
- Oil & gas professionals

Trade Associations (Membership Directories)
- **International Association of Drilling Contractors (IADC)**
- **International Maritime Organization (IMO)**
- **Global Aquaculture Alliance**

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5. Outreach Strategy (Getting to 15 Interviews/Week)

The Math
- **Goal**: 15 interviews/week
- **Conversion Rate**: 10-20%
- **Required Outreaches**: 75-150/week

Weekly Outreach Mix
Channel	**# Per Week**	**Expected Conversion**	**Interviews**
LinkedIn Messages	50	15%	7-8
Email	40	12%	5
Phone/Voicemail	30	10%	3
Referrals	10	50%+	5+ (gold!)
TOTAL	130	~15% avg	**15-20**

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6. Sample Outreach Templates

LinkedIn Message Template
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Hi [Name],

I'm a researcher at [University] working on ocean monitoring technology as part of the Canadian Lab2Market program. I noticed your work in [specific project/area] and thought you might have valuable insights to share.

I'm NOT selling anything--just looking to learn from industry experts like yourself about the challeng

you face with [monitoring/compliance/operations] in offshore environments.

Would you be open to a 15-minute call this week or next? I'm happy to work around your schedule.

Thanks for considering,
[Your Name]
[Contact Info]
```

Email Template
```

Subject: 15-min chat about offshore monitoring challenges?

Hi [Name],

My name is [Your Name], and I'm a [degree] student at [University] participating in the Lab2Market program. I'm researching how offshore operators handle real-time monitoring and compliance reporting.

As [their title] at [Company], I imagine you have firsthand experience with these challenges--and I'd love to learn from your perspective.

Key point: I'm not selling anything. I'm purely in learning mode right now.

Would you have 15-20 minutes for a quick call in the next two weeks? I can work around your availability.

Best regards,
[Your Name]
[Email | LinkedIn]
```

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7. AirTable Setup Instructions

Step 1: Create Your Base
1. Go to airtable.com
2. Click "Create a base"
3. Name it: "L2M Customer Discovery - [Your Project Name]"

Step 2: Set Up Your Table
1. Create columns using the template in Section 3 above
2. Use the correct field types (Single Select, Date, Currency, etc.)

Step 3: Create Views
- **View 1**: "This Week's Outreach" (filter: Outreach Date = this week)
- **View 2**: "Interviews Scheduled" (filter: Interview Status = Scheduled)
- **View 3**: "Completed Interviews" (filter: Interview Status = Completed)
- **View 4**: "Follow-ups Needed" (filter: Follow-up Date ? today)

Step 4: Share with Facilitator
1. Click "Share" button (top right)
2. Click "Invite by email"
3. Enter your facilitator's email
4. Set permission to "Editor" or "Commenter" (ask your facilitator which they prefer)
5. Send invitation

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8. First 30 Contacts to Add (Action Item)

This Week's Goal: Populate CRM with 30 qualified contacts from Segment 1 (Offshore Energy)

Recommended Approach:
1. Spend 2 hours on LinkedIn finding 30 VP/Director-level offshore operators
2. Add them to AirTable with all available info (LinkedIn, company, title)
3. Draft personalized outreach messages (use AI for first draft, then humanize)
4. Send 10 messages per day for 3 days
5. Track responses and schedule interviews

Next Steps
- [ ] Set up AirTable base
- [ ] Add first 30 contacts (Offshore Energy segment)
- [ ] Share AirTable with facilitator
- [ ] Send first 10 outreach messages
- [ ] Schedule goal: 3 interviews by end of Week 2

3. Business Model Canvas

Business Model Canvas - First Draft
Lab2Market Ocean Technology Project

Based on Osterwalder's Business Model Generation framework

Overview

This is your **first draft** Business Model Canvas. Every box contains **hypotheses** (guesses) that must be tested through customer interviews. Expect this to change significantly after your first 30 interviews.

The 9 Building Blocks

1 Value Proposition * START HERE

Which customer problems are we trying to solve?
- **Primary**: Unpredictable equipment failures in offshore operations causing $2M+/day downtime
- **Secondary**: Manual compliance reporting taking weeks and creating audit risk
- **Tertiary**: Poor weather/ocean condition visibility leading to safety incidents

What value do we deliver?
- **Functional Value**:
- Real-time predictive analytics -> Prevent failures
- Automated compliance dashboard -> Pass audits in minutes
- Live environmental monitoring -> Better operational decisions
- **Emotional Value**:
- Reduced anxiety about safety incidents
- Career protection (no audit failures)
- Confidence in decision-making

What are the key features of our product?
- IoT sensor network (hardened for marine environments)
- ML-powered predictive maintenance engine
- Blockchain-verified compliance audit trail
- Real-time dashboard accessible via satellite

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2 Customer Segments * TEST THIS

Who are our most important customers?

Segment	**Priority**	**Size**	**Archetype**
Offshore Energy Operators	PRIMARY	~500 global platforms	"The Risk-Averse Operator"
Maritime Fleet Managers	SECONDARY	~1,000 major fleets	"The Efficiency Optimizer"
Aquaculture Facility Managers	TERTIARY	~200 large farms	"The Environmental Guardian"

What are their archetypes?
- **The Risk-Averse Operator**: Prioritizes safety/compliance over cost. Budget: $500K-$2M/year.
- **The Efficiency Optimizer**: Wants fuel savings and route optimization. Budget: $100K-$500K/year.
- **The Environmental Guardian**: Needs real-time water quality data for regulators. Budget:

$50K-$150K/year.

What job do they want us to get done for them?
- Prevent catastrophic equipment failures
- Automate regulatory compliance reporting
- Enable data-driven decisions in harsh conditions

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3 Channels

Through which channels do our customer segments want to be reached?

Awareness (How do they learn about us?):
- Industry conferences (OTC, Nor-Shipping)
- LinkedIn thought leadership (whitepapers on offshore safety)
- Trade publications (Offshore Engineer, Maritime Executive)
- Referrals from early adopters

Evaluation (How do they assess our value?):
- Pilot programs (3-month trial on one platform)
- ROI calculator tool (input downtime costs -> see potential savings)
- Case studies from similar operators

Purchase (How can they buy?):
- Direct sales (enterprise sales team)
- Channel partners (e.g., equipment vendors, class societies)

Delivery (How do we deliver the value?):
- SaaS platform (cloud dashboard)
- On-site sensor installation by certified partners
- Remote monitoring center (24/7 support)

After-sales (How do we support them?):
- Dedicated account manager
- Quarterly business reviews
- Training programs for operators

Hypothesis to Test: Do they prefer buying direct or through existing equipment vendors?

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4 Customer Relationships

How will we get, keep, and grow customers?

Acquisition:
- Personal sales calls (high-touch B2B)
- Free pilot programs (prove value before full contract)
- Referral incentives (discount for introductions)

Retention:
- Quarterly business reviews showing ROI
- Continuous platform improvements based on feedback
- Annual compliance reports (prove value to executives)

Growth (upsell/cross-sell):
- Start with one platform -> Expand to entire fleet

- Add-on modules (e.g., crew safety tracking, fuel optimization)

Hypothesis to Test: Will they commit after a 3-month pilot, or do they need 6-12 months of proo

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5 Revenue Streams

How do we make money? What's the revenue model? Pricing tactics?

Revenue Stream	**Model**	**Price Point**	**Justification**
Enterprise SaaS License	Annual subscription	$100K-$250K/year	Access to dashboard and analytics platform
Per-Asset Monitoring Fee	Usage-based	$10K/asset/year	Scales with number of monitored platforms/ships
Installation & Setup	One-time	$50K-$100K	Sensor deployment and integration with existing systems
Premium Support	Annual subscription	$25K/year	24/7 monitoring center + dedicated account manager
Data Insights Package	One-time reports	$10K-$50K/report	Custom analytics for specific operations challenges

Total Annual Contract Value (ACV): $150K-$400K per customer

Pricing Anchor: Manual compliance prep costs $200K+/year in labor; equipment downtime = $2M+/incident

Hypothesis to Test:
- Is annual subscription preferred over monthly?
- Will they pay per-asset or prefer flat enterprise fee?
- What's the maximum they'll pay for "automated compliance"?

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6 Key Partners

Who are our key partners?

Partner Type	**Examples**	**What We Get**
Sensor Manufacturers	Emerson, Honeywell	Hardware for harsh marine environments
Installation Partners	Subsea 7, TechnipFMC	Deployment expertise on offshore platforms
Class Societies	DNV, Lloyd's Register, ABS	Regulatory credibility and certification
Cloud Infrastructure	AWS, Microsoft Azure	Scalable computing for ML models
Channel Partners	Equipment vendors (e.g., GE, Siemens)	Access to existing customer relationships

Who are our key suppliers?
- IoT sensor suppliers (critical path)
- Satellite connectivity providers (for remote operations)

What are we getting from them?
- **Sensors**: Certified equipment
- **Class Societies**: Regulatory approval (huge barrier removal)
- **Cloud**: Infrastructure without capex

Hypothesis to Test: Will class societies partner with us or see us as a threat?

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7 Key Activities

What key activities do we require?

Manufacturing/Production:
- None (we don't manufacture sensors, we integrate them)

Software/Platform Development:
- ML model training (predictive analytics engine)
- Dashboard development (real-time monitoring UI)
- Blockchain integration (compliance audit trail)

Supply Chain/Distribution:
- Sensor procurement and quality assurance
- Installation logistics (ship sensors to remote locations)

Marketing/Sales:
- Attending industry conferences
- Publishing thought leadership content
- Running pilot programs

Service Delivery:
- 24/7 monitoring center operations
- Customer success / account management

Hypothesis to Test: Can we outsource installation, or do we need to build that capability in-hous

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8 Key Resources

What key resources do we require?

Financial:
- Initial funding: $2M for MVP development + first 10 pilots
- Runway: 18-24 months to reach revenue

Physical:
- None initially (asset-light model)
- Later: Monitoring center facility (Year 2)

Intellectual Property:
- ML algorithms for predictive maintenance
- Proprietary compliance reporting templates
- Sensor integration protocols

Human Resources:
- **Co-founders**: Ocean engineer + software/ML expert
- **Core team (Year 1)**: 5-8 people
- Lead ML engineer
- Sales/BD lead (industry veteran)
- Customer success manager
- DevOps engineer
- **Advisory board**: Class society expert, offshore operator (former)

Hypothesis to Test: Can we hire a credible sales lead from the industry, or do we need a

co-founder with that background?

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9 Cost Structure

What are the most important costs inherent in our business model? Fixed? Variable?

Fixed Costs (Year 1):
- **Team salaries**: ~$600K (6 people @ $100K avg)
- **Cloud infrastructure**: ~$50K/year
- **Office/admin**: ~$50K/year
- **TOTAL FIXED**: ~$700K/year

Variable Costs (per customer):
- **Sensor hardware**: $20K-$50K (one-time per installation)
- **Installation labor**: $30K-$50K (outsourced)
- **Customer support**: $10K/year per customer (scales with # customers)

R&D Costs (Pre-revenue):
- **MVP development**: $500K (Year 0)
- **Pilot programs**: $200K (10 pilots @ $20K each)

Customer Acquisition Cost (CAC):
- Estimate: $50K per customer (sales cycles = 6-12 months)

Hypothesis to Test:
- What's the true cost of running a pilot? (sensor + labor + support)
- Can we reduce CAC by leveraging channel partners?

Summary: Key Hypotheses to Validate

Riskiest Assumptions (Test These First!)

1. **Pain Intensity**: Do offshore operators rate equipment downtime as an 8+/10 problem?
- **Test**: Ask "On a scale of 1-10..." in first 10 interviews
- **Threshold**: 8/10 must say "8 or higher"

2. **Willingness to Pay**: Will they pay $150K+/year for this solution?
- **Test**: Show pricing slide in interviews 11-20
- **Threshold**: 7/10 say "this is in our budget range"

3. **Decision Authority**: Can we identify the buyer in 6 months?
- **Test**: Ask "Who signs off on technology purchases like this?"
- **Threshold**: Can map decision chain in 8/10 interviews

4. **Channel Preference**: Do they want to buy direct or through existing vendors?
- **Test**: Ask "How do you typically purchase monitoring systems?"
- **Threshold**: Clear pattern emerges by interview 30

5. **Class Society Partnership**: Will DNV/ABS partner with us?
- **Test**: Set up exploratory meetings with 2-3 class societies by Week 6
- **Threshold**: 1+ expresses serious interest in collaboration

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Next Steps

1. **Print this canvas** (or use a large whiteboard)
2. **Color-code each box**:
- ? Green = Validated (evidence from 8+ interviews)
- ? Yellow = Partially validated (some evidence, needs more)
- ? Red = Invalidated (need to pivot)
- ? White = Not yet tested (still a guess)
3. **Update weekly** based on interview findings
4. **Share with team** for alignment

Remember: This entire canvas is a HYPOTHESIS. Expect 50%+ of it to change after your first 3 interviews.

4. AirTable Setup Guide

AirTable CRM Setup Guide
How to Share with Your Facilitator

Step-by-Step Instructions

Step 1: Create Your AirTable Account
1. Go to **airtable.com**
2. Click **"Sign up for free"**
3. Use your university email (easier for your facilitator to verify)

Step 2: Create Your Base
1. After logging in, click **"Start from scratch"** or **"Create a base"**
2. Name it: **"L2M Customer Discovery - [Your Project Name]"**
- Example: "L2M Customer Discovery - Ocean Monitoring Tech"

Step 3: Set Up Your Table Structure

Use the columns from the **CRM_Interview_Targets.md** document I created for you. Here's the quick setup:

Required Columns (in order):

Column Name	**Field Type**
Contact Name	Single line text
Title	Single line text
Company	Single line text
Segment	Single select (options: "Offshore Energy", "Maritime Fleet", "Aquaculture")
Role Bias	Single select (options: "Buyer", "User", "Influencer", "Blocker")
LinkedIn URL	URL
Email	Email
Phone	Phone number
Outreach Date	Date
Outreach Method	Single select (options: "LinkedIn", "Email", "Phone", "Referral")
Interview Status	Single select (options: "Not Contacted", "Reached Out", "Scheduled", "Completed", "Declined")
Interview Date	Date
Pain Intensity (1-10)	Number (0-10 scale)
Problem (Verbatim)	Long text
Current Solution	Long text
Current Solution Cost	Currency (USD)
Key Insight	Long text
Willingness to Pay	Currency (USD)
Follow-up Date	Date
Referrals	Long text
Tags	Multiple select (options: "Early Adopter", "Skeptic", "Champion", "Decision Maker")

Step 4: Create Useful Views

AirTable "Views" are filtered/sorted versions of your data. Set these up:

1. **View: "This Week's Outreach"**
- Filter: `Outreach Date` is `this week`
- Sort: Outreach Date (ascending)

2. **View: "Interviews Scheduled"**
- Filter: `Interview Status` is `Scheduled`
- Sort: Interview Date (ascending)

3. **View: "Completed Interviews"**
- Filter: `Interview Status` is `Completed`
- Sort: Interview Date (descending)

4. **View: "Follow-ups Needed"**
- Filter: `Follow-up Date` is `on or before` `today`
- Sort: Follow-up Date (ascending)

5. **View: "Kanban Board"** (optional but useful)
- Group by: `Interview Status`
- Shows cards moving from "Not Contacted" -> "Reached Out" -> "Scheduled" -> "Completed"

Step 5: Add Sample Data

Before sharing with your facilitator, add **3-5 sample contacts** so they can see how you're using i

Example:
Contact Name	Title	Company	Segment	Interview Status
John Smith	VP Operations	Shell	Offshore Energy	Reached Out
Jane Doe	Fleet Manager	Maersk	Maritime Fleet	Not Contacted

Step 6: Share with Your Facilitator

Option A: Share via Email (Recommended)
1. Click the **"Share"** button (top-right corner of your base)
2. Click **"Invite by email"**
3. Enter your facilitator's email address
4. Set permission level:
- **Editor**: They can view and edit (use this if they want to add notes)
- **Commenter**: They can view and comment (read-only with feedback)
- **Read-only**: They can only view (good for privacy)
5. Click **"Send invite"**

Ask your facilitator which permission level they prefer!

Option B: Share via Link
1. Click the **"Share"** button
2. Click **"Create a shareable link"**
3. Set link permission (Editor, Commenter, or Read-only)
4. Copy the link

5. Send it to your facilitator via email or Slack

Step 7: Notify Your Facilitator

Send them an email like this:
```
Subject: AirTable CRM Access - L2M Customer Discovery

Hi [Facilitator Name],

I've set up my AirTable CRM for tracking customer discovery interviews. I've shared it with you at th
[Editor/Commenter/Read-only] level.

Here's the link: [paste link if using Option B]

The base is called "L2M Customer Discovery - [Your Project Name]"

Currently, I have [X] contacts loaded and I'm targeting [Y] interviews this week.

Let me know if you have any issues accessing it or if you'd prefer a different permission level.

Thanks,
[Your Name]
```

Step 8: Keep It Updated

Daily habit:
- Add new contacts as you find them
- Update "Interview Status" as you progress
- Log "Key Insights" immediately after each interview (while fresh!)

Weekly review:
- Check "Follow-ups Needed" view
- Count completed interviews for your weekly check-in
- Update any stale data

Troubleshooting

"My facilitator can't access the base"
- Check if they're using the correct email
- Verify the invite didn't go to spam
- Try sharing via link instead of email invite

"I want to change the permission level"
1. Click "Share"
2. Find their email in the list
3. Click the permission dropdown
4. Change to desired level

"Can I use Google Sheets instead?"
- Technically yes, but AirTable is **strongly recommended** because:
- Better views and filters

- Kanban boards for visual tracking
- Easier collaboration
- Industry standard for L2M

Next Steps After Setup

1. [X] Share with facilitator
2. Add your first 30 contacts from the research in `CRM_Interview_Targets.md`
3. Start outreach using templates
4. Log every interaction immediately
5. Review weekly with your team

Good luck!