

Once you know what you want to learn, you can talk to the right people, ask the important questions, and save a bunch of time. Early on the questions tend to be fairly broad, such as how they're dealing with the issue already today. Later, you'll have more specific questions such as their budgets, purchasing process, and legal requirements.

On this worksheet you will brainstorm questions you can ask about your customer, not your product. Leave your product out of it for now. When you know someone, you have a good intuition for what they want. We want to get to that level with our customers. It's much easier to buy a birthday present for your best friend than for a complete stranger, right? That's because you understand them.

Your Customer Segment

Be specific! Repeat this sheet if you have multiple customer segments or types.

① Problem

How are they currently dealing with (or ignoring) it?

How deep and urgent is this problem for them? Are they actively looking for better ways to solve it?

How much does it cost them to solve or ignore it?

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② Buying Decision

When's the last time they thought about trying a new way to deal with it? How did they search or evaluate options?

Have they googled for a way to solve it? If not, is that because they don't really care that much? If so, what did they search for? Why didn't they find anything they liked?

If they're still using an old-school solution, why did they choose not to use any of the alternatives on the market?

③ Customer

What's their current workflow to accomplish the goal you're helping with?

Do they have a well-defined, rigid budget, or will it be a small discretionary spend?

Is this a major, critical purchase for them, or a minor impulse buy?

Do you only need a single person's buy-in, or are there complex purchasing process? If the latter, who is involved, how long does it take, and do you have access to them?

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④ Market & Trends

Is the problem well-defined and well-known or do you have to educate customers about it?

Do they want to be educated about it? If so, what are they doing and where are they looking? If not, how do you get in front of them?

Are you dealing with early adopters or mainstream customers? If the former, what else influences them? If mainstream, what evidence do they need to feel this is a safe purchase?

⑤ Anything else you need to learn about your customer?

Which critical facts are you missing about your customers' lives, goals, worldviews, workarounds, constraints, and problems?

What do their lawyers think? Their techies? Their spouses? You're not trying to ask an infinite number of questions, but if it's important, it's worth knowing.

Some answers are hard to get from customers, but easy to get elsewhere. For example, while a customer might be reluctant to share their exact budgeting process or internal drama, an industry expert often has all the information you need and is happy to share.

While customers are the only source of certain critical information (like how they make decisions), non-customers are still a valuable source of additional learning. What useful knowledge might you learn from each of these types of people?

1 Insiders

Industry Experts

Use them to learn facts about how the industry works and sensitive information about the purchasing process like budgets, legal hangups, and stakeholder mapping.

Press

While you may need to filter out some hype, they see lots of companies and have a sense of the big trends.

2 Gurus

Investors

Unlike the press, who only talk about the successes, investors have seen all the companies who have tried and failed to do what you're doing now. They also tend to know lots of high-profile customers, experts, partners, and influencers.

Also, if your company is going to rely on funding, it's helpful to know what sort of concerns investors have about your business, as well as the benchmarks they expect you to hit before being able to easily close a round.

Potential Partner or Supplier

Do you rely on partners for manufacturing, promotion, or distribution? If so, you'd be wise to know what they care about as thoroughly as you know your customers.

If you're discussing (or hoping for) some nebulous partnership, what specific milestones do you both need to hit for it to work? How long will the integration take? What are the legals and contracts that will be put in place to protect you both if it goes wrong?

3 Practitioners

Key Hire

Are you looking for a critical employee or cofounder? Do you know what they care about other than money? What do you need to be able to show or offer them for them to drop what they're doing and join you?

Ex-entrepreneur or Competitor

If someone has run a business like yours before, but has since sold, quit, or shut it down, they can be a goldmine of sensitive information.

Part of doing better customer learning in the future is spotting the mistakes you're making at the moment. This isn't a blame game; learning from customers without biasing them is a new skill and everyone messes it up somehow.

This worksheet is about finding opportunities to get more value out of the time you're already spending. Even the best make mistakes just about every time. We'll never be able to get rid of them completely, but at least we can work to be better.

1 Meeting Details

Speaking to _____ on _____
Name, position, etc Date

Were they the right person to talk to? Yes ☐ No ☐

If not, who should we be talking to? _____
Name, position, etc

2 Learning Audit

Did we learn about them before pitching? If so, what did we learn? In this list, are any learnings:

- empty compliments "I love it!"
- hypotheticals "I would totally use that!"
- opinions "I think this part is good/bad"

If it's bad data, are there facts beneath it (like money being spent on a problem or proof of current behaviour), or is it just fluffy bad data?

3 Commitments

If they seemed keen, we can ask for commitments as a way to evaluate whether they're just excited, or whether they're a real potential customer willing to hand over something of value.

You're not expected to fill in every square; just mark the one or two items per column which match what you did, got, and should have done.

	We asked for	We received	We ideally should have asked for
Time Clear next meeting, time with their team, commitment to spend X hours/weeks using the trial			
Reputation Introductions to someone they care about (e.g. their boss or lawyers), willingness to be in a public case study or testimonial			
Money Letter of intent, deposit, pre-order, purchase, etc			
Info about buying process B2E only. Clarity on budgets, timelines, stakeholders, objections, and any behind-the-scenes info			

Teams will often try to be efficient by assigning one person or group to be “in charge” of customer learning. This becomes a problem when the knowledge never leaves their head and gets into those of the folks making day-to-day product, marketing, sales, and strategic decisions.

❶ Who on your team would benefit from having deep customer understanding?

Product Team	Sales / Marketing	Strategy	Anyone else?
Names of people..			

❷ In the lists above, mark the names of your team-members who are currently *missing* out on good customer learning

❸ How do you want to gather your customer learning on an ongoing, day-to-day basis?

❹ How much time will that take per week?

❺ What processes will you use to document and spread the knowledge to the folks who need it but don’t get it firsthand?

❻ How much time will that take per week?

❼ Are those time costs acceptable? If not, how could you make them low enough that it’s worth putting in the time every week?