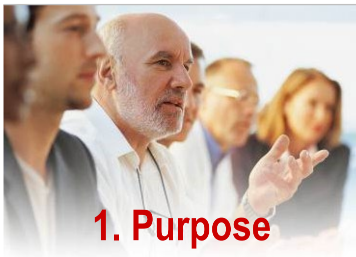
Discovery Interview Quick-Start Card

Tips and Reminders for New Product Blueprinting Discovery Interviews



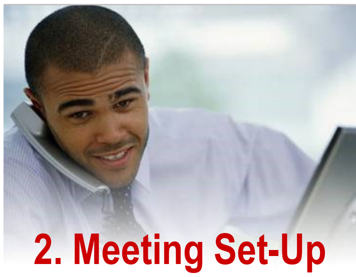
1. Purpose

Discovery Interviews help you enter the world of your customers, prospects and customers' customers. Your goal is to uncover their unspoken—even unimagined—needs… not the same commonly-heard requests your competitors pick up.

After conducting several of these, your team will select the best ideas and return later for Preference Interviews… for a more quantitative assessment of what customers want.

The best Discovery Interviews share the elements to the right…

- The right customer representatives show up—technical, marketing, production, etc.—because they know you're serious and you could help them succeed.
- A laptop & digital projector are used to engage customers.
- A Moderator asks questions while a Note-taker records answers for all to see. An (optional) Observer may capture overall impressions & help as needed.
- The team uncovers outcomes & how they are measured.



2. Meeting Set-Up

When you call to set up an interview, your objective isn't just to get a 'yes' but to get their right people to the meeting and—if possible—secure a tour.

Call with confidence… You are recognizing <u>them</u> as an expert, you want to consider <u>their</u> needs, you're bringing your best people to listen to <u>them</u>, and this may lead to something <u>they</u> will be excited about. This should be about *them*.

Include the points to the right…

- Tell who you will bring (mentioning technical reps often helps)
- Say that specific responses & sources will be kept private, but you'll be glad to share an industry view with them later.
- Ask who they'll invite. If it's a narrow group, mention some of your likely questions that will need other functions to answer.
- Ask for a tour of their operation, preferably given by just your main contact before the others arrive for the main interview.
- Ask for a 2 hour interview in a conference room with a screen… and confirm your meeting with an email & agenda.

3. Pre-Meeting Prep

Consider 3 things before you leave for the airport:
1) Blueprinter® software setup, 2) Roles & 3) Packing list:

1. Blueprinter Setup: Go to the Prep Sheet for your next interview and select your Current-State questions for this interview. Also select your Trigger Maps.

2. Roles: Decide who will be the Moderator, Note-taker and (optional) Observer. Plan who will look for what during the tour using *AMUSE Customer Tour Checklist* downloadable job aid.

3. Packing List:

- Laptop, power adaptor & mouse (optional)
- Extension cord with multiple outlets
- Digital projector, power cord & cable to laptop
- Customer file... background info, contacts, agenda, map
- Other: Flash drive for backup, legal pad, business cards
- Carry-on bag… never put the above in checked luggage

4. Setup & Tour

Make it a strong start…

- Arrive early to set up your equipment. Then you will be able to focus your attention on attendees as they show up.
- The moderator can kick off the meeting with three points…
  1. Explain the purpose of the meeting & its intended benefits.
  2. Explain notes will be projected to make sure you get it right.
  3. Review the meeting agenda (5 parts of the interview below).
- If you give a company overview (because they don't know you), make it < 5 minutes so this doesn't look like a sales call.

If you take a tour of their operation, consider the following…

- Before the tour, ask your key contact to help you make a sketch of their operation that includes major process steps.
- Take the sketch on your tour and—with your guide's help—use it to orient yourself and make notes.
- During the tour, look for ways to:
  - **A**ccelerate activities
  - **M**inimize inputs
  - **U**pgrade outputs
  - **S**implify transitions
  - **E**liminate activities

  (Review AMUSE job aid beforehand)

5. The Interview

Use the following 5-point agenda…

- **Current State**: These questions help you understand their situation today. Don't get bogged down…just 10-15 minutes.
- **Problems**: Record as many of their problems as you can on yellow digital "sticky notes."
- **Ideal State**: Record these on green digital notes.
- **Triggered Ideas**: Display the Outcomes, Benefits or Trends Map. Record their ideas on blue digital notes.
- **Top Picks**: Ask the customer to identify their most important ideas and mark these as TPs. See other tips to the right…

- **Listen hard**: Let the customer speak >75% of the time, try to maintain one conversation and don't go into the selling mode.
- **Just record it *somewhere***: Don't worry if you're using the "wrong" color note… Just capture & probe ideas anywhere.
- **Seek outcomes… not solutions**: Don't solve now… instead make sure you understand the customer's desired Outcomes.
- **Probe**: Probe to convert Background and Solutions into Outcomes... and Outcome Statements. (**See reverse side**.)
- **Next steps**: Explain how you'll follow up: Preference interview, sharing industry results, status reports… (AND DO IT!)

6. Debriefing

Studies show we forget about half of what we learn if we don't recall & review it within 24 hours. Plan to debrief as follows:

- **When**: Debrief immediately following the interview. Schedule flights to allow 2 hours of debriefing time.
- **Where**: Any private spot will do… a casual restaurant, coffee shop or deserted airport gate.
- **Who**: The entire interview team should participate.
- **How**: The note-taker should bring his/her laptop and record additions and corrections. Include the points to the right…

- **How did I do?**: Ask for feedback on your role… what worked well and what you could improve next time.
- **Course corrections**: Discuss any changes for the next interview, e.g. different questions or project scope change.
- **Clean up 'Top Picks'**: Edit your TP sticky notes and ensure you have Outcome Statements for each. (**See reverse side**.)
- **Must-Have Needs**: If some of the ideas on the digital sticky notes were "must-haves," mark them as **MH**.
- **Other**: Check abbreviations, complete partial phrases, etc. Your notes should be understandable to others in 2 years.

Transitions Between Sections of Discovery Interviews

Section		Examples…
Opening	Purpose	We're here to listen. We want to develop a new product that gets *you* excited… not us.
	Projector	We will project our notes for one reason: so you can tell us if we're not hearing you right.
	Agenda	We'll cover 5 parts… Your Current State, Problems, Ideal State, Triggered Ideas & Top Picks.
Before…	Current State	To get started, we had a couple background questions about your business today.
	Problems	The rest is about whatever is important to *you.* What problems would you like to see go away?
	Ideal State	If you could have anything in your ideal world, what would it be?
	Triggered Ideas	Here's a handout that may trigger some more ideas. First… anything we should add or change?
	Top Picks	If you could pick 5-10 favorite ideas, which would they be? In a minute, we'll drag those to the top.
Closing	Thank You	We truly appreciate you taking this time. We'll be giving serious consideration to your needs.
	Copy?	Would you like us to e-mail you a PDF copy of these notes?
	Next Steps	Shall we keep you posted on our progress? Can we check back later with follow-up questions?

Probing for Customer Outcomes

Background
History
Descriptions
Trends
Failure Modes

When you hear Background…

Search for Outcomes…
See if the current state is less than ideal.
Ex: "Any problems with this today?"

When you hear Solutions…

Search for Outcomes…
Look for the purpose of their solution.
Ex: "What would that do for you?"

Solution
Just *one* way to deliver an Outcome. May not be the best.

Outcome
A result that the customer desires. Has obvious value & is stable over time

When you hear an Outcome…

Probe using "What" and "Why"
Convert into Outcome Statement…
Verb… Unit of Measure… Object

Common Verbs		Common Units of Measure
Minimize or **Maximize**	+	**Time**, **Number**, or **Likelihood**

Example: $\underbrace{\text{MINIMIZE}}_{\text{Verb}}\ \underbrace{\text{THE TIME}}_{\text{Unit of Measure}}\ \underbrace{\text{TO DIAGNOSE A DISEASE}}_{\text{Object}}$

- For TPs, record in ALL CAPS in title box of sticky note
- Include only one outcome per sticky note
- No solutions… No combinations… No ambiguity

Top Pick Must Have # Votes 0 Next » 27

MINIMIZE THE TIME TO DIAGNOSE A DISEASE

Sometimes it can take a long time after the medical testing for a diagnosis to be completed. There can be several reasons for this... but all can cause

"What and Why" Probing

WHAT is customer saying?
- Can you **DESCRIBE** this?
- Can you **TELL ME MORE**?
- **WHEN** does this happen?
- **WHERE** do you see this?

WHY is this important?
- **HOW** does it impact you?
- **WHY** is this a problem?

More to learn?
ANYTHING ELSE we should know before we move on?

Next Note
What **OTHER PROBLEMS** are you seeing?