



# MODULE: CUSTOMER DISCOVERY

## MENTOR GUIDE

### Checklist

#### Prior to meeting with mentee(s)

- ☐ Familiarize yourself with module materials.
- ☐ Watch the videos regarding customer discovery/interviewing in the PDF handout.
- ☐ Reflect on personal experiences regarding the customer discovery process so you can speak to those during your meeting.
- ☐ Request for student to complete module and assignments ahead of meeting.

#### Discussion with mentee(s)

- ☐ Defining customer discovery
- ☐ Steps in customer discovery process
- ☐ Creating a customer list
- ☐ Crafting interview questions
- ☐ Critique assignment responses
- ☐ 5 minute reflection

### Suggested Schedule

1. Contact students and assign module materials to be completed within a week.
2. Schedule mentor-mentee meeting.
3. Define customer discovery and its importance when developing new ideas.
4. Discuss how to devise an initial plan of action. Who should be interviewed first? What are some follow up interviews that could be done?
5. Discuss how to develop a comprehensive list of questions for the interview, talk about the differences between leading and open-ended questions.
6. Review and discuss written responses to assignments.
7. Discuss 5 minute reflections and any questions the student may have.



## Special Considerations

When discussing interviewing with students, emphasis should be placed on interviewing in person, and (if applicable) within the client's workplace. Many non-verbal cues and details can be attained in person that cannot be ascertained over a phone interview. Additionally, the place at which an interview takes place can be equally valuable. Many details regarding workplace environment can be observed in person that would likely never be discussed over the phone as the interviewee may not even consider the relevance.

### Customer Discovery Answer Key 3/21/20

**Activity 1: Watch this short Youtube video summarizing the customer discovery process:**

**Activity 2: Determining types of interviewing questions.**

For each of the questions listed, determine whether or not they are leading or open ended and state your reasoning. For leading questions, rewrite the question to be open ended.

1. You always go into the office on the weekends, right?

**Answer:** The phrasing naturally implies that the other person always goes into the office on weekends. A more open-ended way to phrase this question is: "When do you go into the office?"

2. What is your favorite part of the day?

**Answer:** This question is non-leading; it does not imply any part of the day is preferred.

3. Isn't it true that the tests were always positive?



# Research Experience and Mentoring

Created under NSF Grant: EAGER CBET 1451319

<http://eqpoint.info/rem>

**Answer:** This question suggests that the results of the test were positive. A non-biased way to ask would be: "What were the results of the test?"

4. Is a screwdriver or a drill the best tool for this job?

**Answer:** The way this question is phrased suggests there are only two different tools that are best suited for the job when there may be another tool better suited. To rephrase this question in an open-ended manner: "What is the best tool for this job?"

5. What is the weather like for this area?

**Answer:** This question is non-leading and does not imply any specific type of weather with the wording.

6. Does it take 30 minutes to complete this task?

**Answer:** A more open-ended question would be: "How long does it take to complete this task?"

7. How many times do you vacation each year?

**Answer:** Does not suggest any particular answer, this is a non-leading question.

## Activity 3: Preparing a list of people to interview and questions for your interview

**Part 1:** You are working in an engineering lab that discovered a novel way to screen blood samples for a diagnostic test. You believe this could have a large impact on medical diagnostic testing but you need to learn more about the current market and potential customer needs. Create a list of potential people you should connect with to learn more about the market (Think from all perspectives...clinical, engineering, financial, etc...)

**Answer:** Some good starting contacts would be making a list of front-end users (doctors, nurses, nurse practitioners, etc..) and then thinking of back end users (medical technicians, medical lab specialists). Once that contact base has been exhausted students should be thinking of how the technology can be manufactured beyond a prototype (product engineers, manufacturing specialists, packaging specialists, etc..). Students can also connect with business and sales leaders that have background selling medical diagnostics in the area (Sales associates/managers, marketing managers/specialists).



# Research Experience and Mentoring

Created under NSF Grant: EAGER CBET 1451319

<http://eqpoint.info/rem>

**Part 2:** Now that you have a list of people in mind, choose one of those people and come up with a list of at least 10 potential questions for that interview. Remember to phrase questions in an open-ended manner or non-leading.

**Answer:** For example, if you had chosen to interview a front-end user of your device some sample questions may be:

- Walk me through an average day in your workplace from your perspective.
- What are some of the diagnostics you are currently using? What do they test for?
- Are there any problems with current testing from your perspective?
- How much time do these test take?
- What are the limitations of these tests?
- How many tests do you run in a day/week/month/year?
- What is the sample size required to run a test?
- Where are your testing samples sent?

**Answer:** If you had chosen to interview a business manager some example questions are:

- What types of diagnostic equipment do you sell?
- What is your highest selling unit?
- What is the list price for these products?
- Are there any upkeep or maintenance costs associated with the products you sell?
- What are some current limitations in the devices you sell?
- What is your primary customer base?
- What are some of the most requested needs from your customers?
- How do you define customer needs?
- How do you find new customers?