

## Table of Contents

<b>Instructors .....</b>	<b>2</b>
<b>Program Dates.....</b>	<b>2</b>
<b>Program Description .....</b>	<b>2</b>
Goals.....	3
Program Culture .....	3
<b>Tools &amp; Resources .....</b>	<b>3</b>
Workbook .....	3
Required Texts.....	4
Additional Resources .....	4
Innovation Within.....	4
Lead Generation .....	4
<b>Assignments .....</b>	<b>5</b>
Session 1: Customer Discovery Best Practices (Due before 9AM on 1/21) .....	5
Session 2: Customer Archetypes & Value Propositions (Due before 9AM on 1/28) .....	6
Session 3: Customer Archetypes (Due before 9AM on 2/4).....	7
Session 4: Commercialization Plans (Due before 9AM on 2/11) .....	8
Session 5: Finances (Due before 9AM on 2/25) .....	9
Session 6: Storytelling for Pitching (Due before 9AM on 3/11).....	10
Session 7: Practice Pitches (Due before 9AM on 3/25).....	11

## Instructors

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## Program Dates

Zoom links will be provided for all sessions beforehand. Please sign on 15 minutes early to test your settings and get settled.

Session Topics	Date	Time
Orientation	Jan 8	1-2PM CT
1:1 Intro Sessions	Jan 9-21	
Session 1: Customer Discovery Best Practices	Jan 22	1-4:30PM CT
Session 2: Value Propositions	Jan 29	1-4PM CT
Session 3: Customer Archetypes	Feb 5	1-4PM CT
Session 4: Commercialization Plan	Feb 12	1-4PM CT
Session 5: Finances	Feb 26	1-4PM CT
Session 6: Storytelling for Pitching	Mar 12	1-4PM CT
Session 7: Practice Pitches	Mar 26	1-4PM CT
Draft commercialization plan outlines due (optional)	September 4	

## Program Description

This program will play a critical role to help you learn and apply the Lean Startup framework allowing you to test/advance/improve your business idea and commercialization plan while meeting SBIR Advance payment milestones. You will be:

- Identifying your riskiest assumptions based on your assessment of prior IP, competitive landscape, and additional secondary market assessments
- Applying that learning to assess your riskiest assumptions and strategies via interviews and customer behavior experiments
- Learning where the gaps, risks, and greatest unknowns are in your business model
- Discovering that what you think you know is incomplete, or wrong.
- Building strong arguments and data to support your Phase II commercialization plan.

You are expected to talk with customers, partners, and competitors as you encounter the chaos and uncertainty of building a business based on your new technology. The experience of doing this is demanding, but time and again, we have seen teams that commit to this process transform their business assumptions. This direct interaction with potential users and customers is essential to commercialize science (whether to license the technology or launch a startup.)

***This process can't be outsourced.*** This same process is used in NIH and NSF I-Corps programs, and evidence shows the Lean Startup approach of talking to 50+ customers/stakeholder is the most effective program for commercializing science. The learning from discovery interviews can provide powerful arguments and support for the assertions you make in your commercialization plan. Statements that are backed up by quality interviews carry a lot of weight for your SBIR Phase II proposal. Beyond the proposal, companies that have used these techniques have saved years of time and millions of dollars for themselves and the U.S. taxpayer. The ultimate objective is for your company to accelerate the commercialization of your technology.

## Goals

1. Gain an experiential learning opportunity to help determine the commercial readiness of your product/service.
2. Learn to address only the most critical business assumptions and devise tests to confirm the learnings through high quality, high quantity interviews and minimum viable experiments (MVEs).
3. Learn to make clear go/no go decisions regarding commercial viability of your idea.
4. Develop a plan to move your product/service forward to market.
5. Develop a **winning SBIR Phase II Commercialization Plan**.

## Program Culture

In this program we will work together to develop a learning community that is **actively** engaged while remaining **inclusive** and **respectful**. Dedication to inclusiveness requires respecting what others say, their right to say it, and the thoughtful consideration of others. Both **speaking up and listening** are necessary tools for furthering thoughtful, enlightening discussions. Respecting one another's individual differences is critical in transforming a collection of diverse individuals into an equitable, collaborative and excellent learning community. Active, thoughtful, and respectful participation in all aspects of the program will make our time together as productive and engaging as possible. We value your participation in this process.

## Tools & Resources

### Workbook

The PowerPoint-based workbook has exercises that will participants put learnings into practice and will be a core part of the sessions. Teams will complete the noted worksheets ahead of the session and be prepared to share their screen with the cohort during the session. Note that there are often additional instructions or guidance given in the Notes section, so be sure that section is visible when you are working in the file. You may notice that the workbook activities relate to the previous week's topic. This is to ensure that you have time to collect evidence from your interviews and other experiments as you fill out the assignments.

## Required Texts

[Talking to Humans](#)

[Testing with Humans](#)

## Additional Resources

[Startup Owner's Manual](#) (book)

[Business Model Generation](#) (book)

[VentureWell Customer Discovery videos](#)

[LinkedIn for Customer Discovery](#) (video)\*

\*LinkedIn Premium and/or Sales Navigator are acceptable uses of funds.

## Innovation Within

A key component of the program is documenting and analyzing your customer interviews. It is important that each team systematically capture the demographics of the interviewee as well as the key insights gained from the conversation. To assist with this process, we will be using a tool called Innovation Within. You will receive login information prior to the start of the classes, though we will also have time during the first class to go through how best to use the tool. Please look at it in advance and come prepared with questions.

## Lead Generation

[WiSolve](#) can support you in interview lead generation. The UW-Madison scientist/consulting group has helped past SBIR Advance awardees. CTC recommends them to support deliverables due in August.

Email finders like [Hunter.io](#), [RocketReach](#), and [Apollo.io](#) as well as LinkedIn Premium, LinkedIn Sales, and virtually any other support tools for salespeople are great uses of funds to assist in identifying interview candidates and getting accurate contact information.

## Assignments

Please complete the assignments listed **BEFOREHAND**, no later than 9AM the day of the session. Thus, the assignments under session 1 must be complete before the program begins. Watch the videos and complete the readings before beginning any other assignments.

### Session 1: Customer Discovery Best Practices (Due before 9AM on 1/22)

The lecture portion of the first class will focus on how to conduct customer discovery. Topics will include why we do interviews, interview sourcing, crafting questions, and using Innovation Within.

#### Reading & Viewing

- *Talking to Humans* pages 31-65
- Read [A Startup is Not a Smaller Version of a Large Company](#) – Steve Blank
- Optional: Watch [LinkedIn for Customer Discovery](#) (23 min) and [Market Research Tips](#) (34 min) videos for help on recruiting techniques

#### Customer Discovery

- Begin compiling a list of target interviewees. These should be people who are not familiar with what your company does in any detail.
- Begin scheduling interviews, especially for between Sessions 1 and 2
- Do NOT do any interviews beforehand as they will not count toward your 50 interview requirement!

#### Workbook Assignments

- **Team Profile** – a quick overview of who is on your team and what you do
- **Skinny Canvas** – a place to list the core assumptions about your product/market fit
- **Business Thesis** – a one sentence elevator pitch for your business
- **Who Matters Most** – a list of types of people that are significant players in your ecosystem. You will likely want to interview people from every category you list.
- **Outreach Language** – the copy you are using to ask for interviews
- **Interview Script** – the list of questions that you plan to ask during your interviews

#### Miscellaneous

- Complete this [questionnaire](#) at least 2 business days prior to your individual meeting with the CTC team.
- Log into [Innovation Within](#) and begin familiarizing yourself with the platform.

## Session 2: Customer Archetypes & Value Propositions (Due before 9AM on 1/29)

The lecture portion will cover the importance of defining a specific archetype so that you can determine what values (not features!) you can provide that will motivate them to become customers. We will discuss how critical it is to define the unmet need and understand how that need compares with other challenges the customer segment faces.

### Reading & Viewing

- Read [4 Steps to Building a Compelling Value Proposition](#) – Forbes
- Watch the [Milkshake Test](#)
- Watch this [example interview](#)

### Customer Discovery

- Conduct 5+ interviews before Session 2
- Record at least one interview and upload the audio file to Innovation Within for transcription
- Mark insights in Innovation Within ensuring you link those insights to your Canvas

### Workbook Assignments

- **Weekly Insights** – a one-slide reminder of who you are, how many interviews you did since the previous session, and the top three insights you gained from those interviews
- **Value Proposition Test Cards 1-6** – these six cards are designed to further extract the core assumptions about your business and highlight areas where you still do not have all the answers
- **Ranking Problems** – a visualization of all the customer problems that customer faces and how the ones you can solve compare to the ones that you are not addressing
- **Outreach Language Update**
- **Interview Script Update**

### Miscellaneous

- Fill out the Canvas on Innovation Within. Take your best guess on the boxes.
- Schedule office hours

### Session 3: Customer Archetypes (Due before 9AM on 2/5)

As you understand more about your customer archetype from your interviews, you will also start to learn how best to reach those people. You will learn how to test hypotheses in experiments other than interviews, though interviewing will still be a critical component of your work.

#### Reading & Viewing

- Read [What is a customer archetype and how do you make one?](#) – Brafton

#### Customer Discovery

- Conduct 5+ additional interviews
- Record notes and mark insights in Innovation Within
- Update Canvas in Innovation Within

#### Workbook Assignments

- **Weekly Insights** – a one-slide reminder of who you are, how many interviews you did since the previous session, and the top three insights you gained from those interviews
- **Customer Types** – the various roles that people can play while you are trying to sell into the company
- **Customer Archetypes** – the specific details about a particular customer type. We will focus on decision makers and end users (if they are different) initially.

#### Miscellaneous

- Schedule office hours

## Session 4: Commercialization Plans (Due before 9AM on 2/12)

As you continue to understand your problem/solution fit, we will start delving deeper into product/market fit. We will explore how you deliver your product to your customers as well as what kind of partnerships will be necessary for your business to grow as quickly as possible.

### Reading & Viewing

- Look at these examples of ecosystem diagrams and start thinking about what yours might look like:
  - [Netflix Example](#)
  - [Digital Business Example](#)
  - [Medical Ecosystem Example](#)
- Read “[What are the advantages and disadvantages of using top-down and bottom-up approaches for market sizing?](#)”
- Optional: Take a look at [this Medium post](#) that has some specific strategies for finding data about competitors to be used to support assumptions made in your market sizing

### Customer Discovery

- Conduct 10+ additional interviews
- Record notes and mark insights in Innovation Within
- Update Canvas in Innovation Within

### Workbook Assignments

- **Weekly Insights** – a one-slide reminder of who you are, how many interviews you did since the previous session, and the top three insights you gained from those interviews
- **Ecosystem Diagram** – a visual representation of the stakeholders in your business ecosystem showing how money, information, and other items flow between them
- **Market Size – Top-Down** – a diagram to show at a high-level what your market potential is
- **Market Size – Bottom-Up** – a diagram to show at a more granular level what your more realistic market potential is

### Miscellaneous

- Schedule office hours



## Session 5: Finances (Due before 9AM on 2/26)

### Reading & Viewing

- [A Quick Guide to Value-Based Pricing](#) by Harvard Business Review

### Customer Discovery

- Conduct 10+ additional interviews
- Record notes and mark insights in Innovation Within
- Update Canvas in Innovation Within

### Workbook Assignments

- **Weekly Insights** – a one-slide reminder of who you are, how many interviews you did since the previous session, and the top three insights you gained from those interviews

### Miscellaneous

- Schedule office hours

## Session 6: Storytelling for Pitching (Due before 9AM on 3/12)

### Reading & Viewing

- Read [Storytelling that Moves People](#) – Harvard Business Review

### Customer Discovery

- Conduct 10+ additional interviews
- Record notes and mark insights in Innovation Within
- Update Canvas in Innovation Within

### Workbook Assignments

- **Weekly Insights** – a one-slide reminder of who you are, how many interviews you did since the previous session, and the top three insights you gained from those interviews

### Miscellaneous

- Schedule office hours

## Session 7: Practice Pitches (Due before 9AM on 3/26)

### Customer Discovery

- Conduct 10+ additional interviews. Ensure that you have at least 50 interviews completed before the final session.
- Record notes and mark insights in Innovation Within
- Update Canvas in Innovation Within

### Miscellaneous

- Submit deck for a 7-minute pitch
- Optional: submit draft commercialization plan by end of the month