Concept Validation
Conversation Planning Guide and Template

Evidology Group

Table of Contents

Overview

The goal of customer conversations is to collect evidence to complete the Concept Validation Canvas. This involves validating the hypotheses documented in Workshop #1 using the Value-Positioning and Capabilities-Benefits Summary templates.

This document is both a step-by-step guide and worksheet for building a plan for each set of customer conversations. It is recommended you skim through this document from beginning to end before starting to use it as a worksheet.

Step 1 – Priority Questions to be Answered – is ***identifying the highest priority top-level questions that need to be answered*****.** In initial conversations, these are typically the questions that underpin your problem and solution hypotheses.

Step 2 – Target Personas – is selecting the ***initial personas to target for conversations who are most likely able to answer those high priority questions*****.**

Step 3 – Conversation Script – is ***developing the conversation script***. Each ***conversation must be tailored to the high priority questions you want answered*** and ***the domain knowledge of the personas*** being targeted.

Step 4 – Logistics – is determining the role for each participant on your discovery team to get the most out of the call or meeting.

Step 5 is to iterate on this process. With each conversation, the key question list and script will evolve based on learnings, as priority questions are answered and new priorities emerge, and for each persona.

At the end of this guide, **Appendix 1** contains **best practice** tips **for Customer Conversations**.

Step 1 – Priority Questions to be Answered

The list of priority questions to be answered will evolve as your understanding grows from each set of customer conversations. Accordingly, your conversation script will evolve or a new one created as driven by updates to your priority question list.

*To start, keep your Concept Validation Evidence Collection Goals in mind (sidebar), identify the **highest priority questions to be answered** that have emerged from Workshop #1. Your list should have **no more than 5 or 6 questions**.*

For initial conversations, this does not mean ignoring all other evidence collection goals. A recommended strategy is to develop a conversation script that focuses on priority questions but also includes general questions related to other evidence collection goals.

For example, initial conversations typically focus on confirming the identified target customer perceives the identified problem to be significant and the proposed solution provides a high-value differentiated solution. It is valuable to also include a question or two about the buying process for this type of solution and typical budget sizes.

Example high priority questions:

1. *Have we identified the correct ideal target – who really owns this problem?*
2. *Is the target problem a priority?*
3. *What metrics/KPIs does it impact?*
4. *What is the relative value of the proposed capabilities?*
5. *What would trigger a buying process for our product?*
6. *What does the buying process look like at a high level and who are all the stakeholders?*

Concept Validation Evidence Collection Goals

Collect evidence to support and evolve the following:

1. *A significant, high priority, unmet need exists*
2. *There is a significantly large and homogeneous market to pursue*
3. *Current options are unsuitable. Competitors cannot or will not meet this need.*
4. *Customers are willing to pay an amount that supports the business model*
5. *There is an effective direct/indirect path to reach target customers*
6. *There are no systemic barriers that prevent customers from buying*
7. *The purchase process and decision-making can be navigated in a repeatable way*

Priority questions to be answered for this conversation set:

1	
2	
3	
4	
5	
6	

Step 2 – Target Personas

Focus initially on the personas (internal or external to your target organization) that are critical for answering the priority questions. *This may include personas at companies in the value chain for the associated market. Typically, it involves those identified as the "problem owners" (business buyers). It may also include technical buyers or users, depending upon the situation.*

For example, in the complex healthcare market it may be necessary to talk with key individuals representing Pharma (target business buyer), Providers (determine treatment plans and delivery), and Payors (control payment schedules). In another example, a SaaS offering for HR consultants is less complex and may only require conversations with the consultants as Business Buyers and Users.

A later discovery stage following concept validation focuses on the customer buying process. At that time, customer conversations may be expanded to all "buying process" stakeholders – Users, Technical Buyers, Financial Buyers, and other gatekeepers or influencers.

Example: Personal productivity software for B2B sales lead generators

Target Persona	***Expected Role / Perspective Relative to Concept***
Business Development Rep	*Individual Business Buyer and User*
VP, Sales	*Business Buyer for enterprise decision and Dashboard User*

The personas that need to be contacted for this conversation set are:

Target Persona	**Role / Perspective Relative to Concept**
Persona #1	
Persona #2	
Persona #3	

The quality of your analysis and subsequent decision making is affected by the number of customer conversations. The more conversations, the more data for spotting trends, developing insights, and determining whether the market is sufficiently large and homogeneous.

Plan for at least 5 conversations per persona in each targeted geographic region*. Based on initial responses, there may be a need to widen or narrow scope of your outreach.*

The target number of conversations by persona, region, and advisor assistance are:

Persona	Advisor Assisted (e.g. Evidology Group)	Without Advisor Assistance
Persona #1 (region #1)		
Persona #2 (region #1)		
Persona #1 (region #2)		
Persona #2 (region #2)		
etc.		
Total		

Step 3 – Conversation Script

The conversation script is consistently identified by our clients as having more value than imagined prior to creating and using one. They find this approach results in higher quality conversations that yield more insights with minimal influence from your personal beliefs or biases.

The customer conversation script is a framework with three major components:

1. *A set of topic areas and their sequence in the conversation (planned order)*
2. *Statements to set the context for discussion and to transition between topic areas*
3. *A list of specific question to be asked, grouped by topic area*

Please note the following:

1. *The context you set, the order in which you explore topics, and the way you ask questions can make a significant difference in the relevance and quality of information collected*
2. *A conversation script approach is more likely to foster a true conversation, rather than a transactional Q&A exchange, and one that could become the first of many conversations with that individual*
3. *Conversations easily go in directions never imagined. It is common for the call time to be up and call goals have not been met. A script containing a framework or roadmap makes it easier to keep your goals in mind*

The general-purpose framework provided below should be adapted to each set of conversations based on:

1. *Who you will be talking with*
2. *What you want (need) to know*
3. *How much time is available for each conversation*

Topics should be added or removed based on the evidence you need to collect (priority questions) and from which persona. You should skip topic areas, add/delete/alter questions in each, and update the statements that transition from one topic to the next as required for each conversation set.

Build your script assuming your conversation time is limited to 30-45 minutes. This time constraint is critical to avoid a rushed and unproductive conversation. Recognize that it may take more than one conversation to cover all the necessary questions and that by building a rapport in the first conversation, customers are often open to a follow-up conversation.

In this guide, the method described for developing a concept validation script uses a "challenge statement" format to foster a conversational-style interaction. Depending upon the situation, this format may not be appropriate. Regardless, keep in mind the goal in this instance is to create a more open flow of information that might not be achieved with a transactional style "survey".

A combination of open, closed, and probing questions are used. Open questions, like challenge statements, must be carefully phrased to ensure the response is directly relevant to the conversation goals yet not biased or leading.

Both the conversation flow and content are designed to be non-threatening, and to establish credibility and build trust. In short, creating the foundation for continuing the conversation (in learning mode).

Conversations are fluid and can go in any direction. Be open to this unpredictability. You may learn something that warrants immediate probing, causes a jump to ask questions out of sequence, or appears to completely derail your conversation plan. You need to be flexible and look for opportunities to cover what you can within the available time without being overly rigid.

And finally, while some questions are best asked as written, every Conversation Leader will need to inject their own style and personality to keep the interaction relaxed and in a conversational mode.

Conversation Expectations

[Start with title slide showing]

At the outset, set up the conversation for success by demonstrating professionalism, establishing credibility, and showing respect for their time. Be brief and take no more than a minute or two to cover everything.

This section is primarily statement-based where you:

1. *Introduce all call participants on your end and their role in the call (conversation leader, notetaker, observer, etc.)*
2. *Restate the reasons and objectives for the call, reinforcing prior communications that led to this moment*
3. *Tell the customer what to expect during the call (make statements, ask a series of questions, etc.) and how their feedback will be used*
4. *Confirm the available time*

Transition to the next topic by asking a question such as "Is this clear?" or "Do you have any questions before we begin?".

Example content:

- Thanks for taking the time to speak with me {us} today
- Before we begin, let me introduce… {pause for participants to say something if relevant}

- As you know we're looking for your feedback and insights to make sure we're on the right track
- Key topics to cover are:
    - …
    - …

- The format we'll be using is:
    - A few basic questions about your role/responsibilities
    - Then I'll {be making a few statements to serve as discussion points}
    - Following that, I'll {present …to get your thoughts… ask a series of questions…}

- We'll use this information to guide {…our product and business plans…}
- Before we begin, I'd like to confirm how much time you have…
- Do you have any questions before we proceed?

Customer Profile

In this section your questions have two purposes:

1. *To understand a person's perspective and what might be shaping their feedback. You want a sense of their "context" or "position" from which they are responding. This will help you interpret their responses.*
2. *You want to be able to identify common characteristics about them and their organization for creating segment profiles when looking for patterns or trends across all your conversations. Data from this section is helpful for market segmentation.*

You can transition to the Customer Profile topic with a combination statement/question like, "To begin, I'd like to get a better understanding of your role and scope of responsibilities… how long have you been in this role?

While open-ended questions are generally preferred, as noted above conversations can quickly veer off topic, especially when talking to someone who spans several organizations and sits on multiple committees like you find in the healthcare delivery sector. Your available meeting time can easily be consumed by an individual talking about just their role. You want to ask open questions but ones that are "open directed" or "bounded".

Keeping the Conversation on Track Tip #1

If you need to gain back control when they take a breath (if they take a breath), first acknowledge what they have said. Acknowledgement may be as simple as, "Oh, that's interesting". You may then follow your comment or observation with something like, "I'd love to learn more about that. But given our limited time…" or "Oh, that reminds me…" which creates an opportunity to move on to a related or different question that returns back to the general topic area.

Example content/questions:

Great! First, I'd like to get a better understanding of your role/responsibilities at {…}:

- How would you describe your responsibilities?
- How long have you been in this role?
- How big is your team? How is it organized? Number of people in each role?
- {At what point in the product lifecycle do you get involved?}
- How is your {personal…group's} success measured?
- Thanks. That helps me better understand {…}

Problem Importance & Change Motivation

This section is where you want to collect the evidence needed to answer the critical questions to validate your product concept. ***Does the problem you are targeting exist in your target customers' mind and where does it fit relative to their perceived priorities, problems, and what is the urgency to solve this problem?***

You want to know:

1. *The order of magnitude of your target problem; is it a 5-out-of-5 burning issue or a 1-out-of-5 nice to have.*
2. *How they measure the impact of this problem being solved or not being solved; the KPI or performance metrics impacted*
3. *Whether solutions to problems like this get funded*

To reduce the risk of receiving a not-so-relevant answer, we suggest using a "challenge Statement" to establish a context or anchor point for their response.

This approach results in a better sense of where your targeted problem fits in their worldview. And now you've established a context – an anchor point – for those broader questions such as "What are your priorities?" and "What are you most pressing problems?", plus other questions related to where their daily time, attention, and budget goes.

The challenge statement may be slightly provocative to elicit a response but not to the extent of potentially impacting your credibility. Even if customer problems and priorities are well understood, it is still worthwhile to spend a minute on this topic for level-setting.

Keeping the Conversation on Track Tip #2

It is natural to ask a question like, "What are your priorities?" and "What are your KPIs?". These are open-ended questions with no embedded bias. However, you risk receiving a long-winded answer that consumes valuable conversation time and may have little relevance to what you need to know.

To avoid this pitfall, offer a statement for discussion like "Being able to find better qualified leads is one of my most pressing challenges", followed by an open-ended question about their reaction and then further probing on why that reaction.

Example content/questions:

[Show Challenge Statement slide]

Ok, so here's the first statement for discussion…

> **"Being able to {do/provide/have} is one of my most pressing challenges that impact {target KPI}"**
>
> *Example:*
>
> *"Finding better qualified leads is one of my most pressing challenges that impacts sales growth."*

- What is your reaction to the statement? {Yes? No? Why? Why not?}
- In your role as {…}, what are your most pressing problems?
- What would be the impact of solving this problem {of interest}?
- What would it mean for {you / your team / organization}?
- How would {the impact} be measured? {metrics or KPIs used}?
- How much would that metric have to be impacted to trigger interest in buying a solution?
- Taking a broader view – considering other {industry players} – are these high-ranking problems for them?

Current State

Once you know how your target problem fits in their world, shift the conversation to how they do things today. Dig into how the problem manifests itself and what current plans or projects exist to solve the problem.

You want to ask questions that help characterize and quantify current product, service, or process use. For currently identified options or plans, explore what challenges they anticipate when selecting or using them. Remember that status quo (do nothing) is a common option if the problem isn't urgent, important, or if the solution is perceived as high-risk.

In this section you want to uncover critical information on:

- *Existing tools, systems, and processes*
- *Competitive options with associated strengths and weaknesses*
- *Current economic impact of the current state, if not covered earlier*
- *Solution compatibility considerations (architecture, interfaces, etc.)*
- *Change management challenges*
- *General background for interpreting later feedback in the next topic area*

Transition into this topic area by asking something like, "Could you please describe how you deal with {the problem} today?" and "Would you mind walking me through…?".

Example content/questions:

- How do you deal with {what's being done about} the problem today?
- Would you mind walking me through {what you… how you…}?
- How long does each step typically take?
- What options or alternatives are being considered?
- What do you see as the strengths and the weaknesses for each?
- What are the primary barriers or challenges to {solving the problem} {implementing a solution}?
- What {tools, systems, processes} would a solution need to be compatible with?
- Do you anticipate concerns from {end users… other stakeholders…} about possible solutions?

Solution Value Drivers & Differentiators

After gaining insight into the problem from their perspective, it's relative importance overall, how things are being done today, and what is being considered for the future, you can now test the level of interest and perceived value for each key capability that makes up your proposed solution.

You want to get their thoughts on each major capability that makes up your solution:

1. *Does each capability have value?*
2. *How is that value measured?*
3. *Which capabilities are more important than others?*

You want to know the "why" behind their answers and dig into what they believe to be meaningfully different and better than other options.

Use a Capabilities-Benefits slide as a discussion aid to explore the top 3-5 capabilities and benefits of your solution. The previously completed Capabilities-Benefits Summary contains content that can be repurposed for this use.

After briefly describing the capabilities (what/how) and their intended benefits (why), the line of questioning should be something like, "What are your thoughts on an offering like this?". Then going through each individual capability, ask for an importance rating (1=low, 5=high), followed by probing questions starting with "Why that rating?".

To transition into this section you may simply state, "Given all we've discussed, I'd like to get your feedback and advice on what we're developing {planning}, its capabilities, and potential usefulness".

Use of Supporting Slides and Do Not Sell Tip

Generally, we recommend a slide that captures all capabilities and their associated benefits to support the conversation. Depending upon the complexity of your solution, it may be necessary to have a few slides: each one summarizing a collection of capabilities – what they are, what they do, and anticipated benefits. Wherever possible use graphics, screenshots, or other visuals to support and reduce the amount of text. The use of images will help avoid misinterpretations resulting in more meaningful feedback.

Also, at this point in the conversation, it is too easy to switch into selling mode, especially if the customer starts asking you questions. It is important to stay in discovery mode. In response to questions – other than ones asking for clarification – respond by saying that you'd love to set up a separate call to provide a detailed view of your solution, but right now want to focus on filling gaps in understanding their needs as a representative of the market. Keep the context of testing the value of what you are planning or in the process of developing

Example content/questions:

- Thanks, that helps me understand… {something you learned about priorities and/or current state}
- This discussion has been {extremely interesting/helpful}
- Given all that we've discussed, I'd like to get your feedback and advice on what we're developing {planning}, its capabilities, and potential value

[Show Capabilities-Benefits slide(s)]

Capability	**Benefit**
*Example: **USE GRAPHIC OR SCREENSHOT IF POSSIBLE** –* ***Automatically creates** and **removes holds** in electronic calendars, **based on email content** when suggesting and confirming meeting times*	*Example:* • *Minimizes double-booked meeting risk* • *Reduces meeting coordination time by 15%*
…	…

- Let me quickly summarize each major capability, then we can talk about each one…{summary}
    1. {Summary}
    2. {Summary}
    3. {Summary}
- I'm curious, what are your initial thoughts on {an offering] like this?
- Can you see it fitting into your {architecture, work process, etc.}?

[For each row]

- On a scale of 1-5 (1=low, 5=high), how important is {the ability to / being able to…}?
    - Why that rating?
    - {Additional probing question(s)}

…

- What's missing? What would the ideal solution look like to you? {Probe}

Future State

Once you have created an understanding of your proposed solution and received direct feedback on each capability/benefit and relative value, shift the conversation to their future world. You want to probe more on the solution's relevance and overall value, assuming it has been implemented along with any additions they suggested. The conditions have been set to further probe the perceived impact to their business, objectives, and goals.

It is also during this stage that implementation and adoption challenges uncovered or known from the Current State may be further explored.

The transition to this section may be supported by asking, "If you had this solution with {1,2,3..}, how would it be used?" or "How would this solution fit in your program {work process…}?

Example questions:

- If you had this set of capabilities, how would it be used?
- Where would it fit in your {program, process, architecture, etc.}?
- What would that do for your {business/objectives/goals}?

Buying Process

*After validating the target problem and proposed solution, **it is critical to gain an understanding of how customers buy.** What triggers the buying process, who are all the stakeholders, what decision-making steps do they go through, where does the funding come from, how does that process work, and how long does it typically take going from "need identified" to "purchase order"?*

The Buying Process is a critical topic needing in-depth exploration. You may have the best product ever but there could be systemic barriers to it being bought that must be uncovered. At the very least, you need this information to develop a repeatable sales process.

With initial problem/solution validation conversations, the time on this topic may be short and high-level. Start with questions that will give you a general sense of the process (e.g. committee-based, use a Request for Proposal (RFP) process, etc.) and uncover yellow or red flags to explore in later conversations when it's understood the Buying Process is a primary topic.

When transitioning to this topic, avoid creating the impression you are moving into selling mode. Use a statement like, "To change topics, one of the gaps for us is understanding what triggers the need or intent to purchase a solution like this", followed by a question like, "Can you think of an example when you bought a similar product in the past - what situation or events led to the need to buy?" which naturally leads to a question like, "Can you walk me through the process you went through to a make a decision and the steps in your procurement process?"

Example questions for high level information collection:

- To change topics, one of the gaps for us is understanding what chain of events would lead to a company like {company} acquiring a solution like ours
- Thinking about prior purchases, what situation or events would highlight the need for a {solution} like this, then trigger a decision to investigate buying? {i.e. Status quo is not sufficient}
- Who typically initiates and drives the buying process?
- At a high level, what does that process look like?
- Who owns the budget? {Where does funding typically come from?}
- What situations or conditions have prevented a solution like ours from successfully navigating that process?

Closure and Next Steps

A few minutes before the agreed finish time, shift into closure mode. Someone has spent their valuable time with you. Show your appreciation and attentiveness by highlighting their contribution. Thank them, then briefly note a few key points that were especially helpful or informative.

Following your expression of appreciation, we recommend three final questions:

1. Do you have any other thoughts / ideas that might be helpful for us?
2. Who else would you suggest we talk with to validate/get feedback on this idea?
3. Would you mind if I came back to you later for a follow up discussion?

Time Check Tip

There are several causes that lead to time constraints during a conversation: an overly ambitious script, an engaged customer that enthusiastically embraces questions with detailed responses, or the need to ask the same question several times as the answers you receive are unclear or out of context.

Regardless of cause, at the beginning of the conversation and at other periods as needed, do a time check. If more time is needed, simply estimate what you think is needed and ask whether they have a hard stop or can go over an extra x-minutes. Your request must be reasonable and in a worst-case scenario ask if it's possible to schedule a time to finish the conversation. If engaged, they will agree. If they are not engaged, then they will decline giving you insight into their interest.

Cheat Sheet Tip

After developing your statement and question script for each topic, create a "cheat sheet" by deleting all instructions and any other unnecessary content. You should be left with a 1-2 page framework to print and use as a guide during the conversation.

Post Call Tip

Send a thank you email expressing appreciation, note any key learnings (again), and set the stage for any follow up/follow on contact

Step 4 – Conversation Logistics

Roles

Ideally no more than 2-3 members of the customer discovery team join the conversation. Each should have an assigned role: Conversation Leader, Notetaker, or Challenger/Coach. Depending upon the situation, the Conversation Leader or Challenger/Coach may also serve as the Notetaker. In other situations, where it may be important to have additional participants, they should serve as silent observers only.

The Notetaker is responsible for taking detailed notes, collecting notes from other participants, and leading the process to write a 1-2 page summary with key observations, learnings, and any action items.

An advisor such as your mentor or the Evidology Group is best suited to be the Challenger/Coach. They are responsible for ad hoc assistance during the conversation – asking for clarification or adding a probing question – and helping post-call to identify missed insights, point out interpretations based on personal biases, and provide suggestions for improving future conversations.

The assigned roles are:

Role	Name
Conversation Leader	
Notetaker	
Challenger/Coach	
Observers	

Timing

***Pre-Conversation**: For web conferences, launch the conference application and activate the screen share (for supporting slides) at least **5-minute**s before the time your target customer is expected to join.*

***Conversation**: The conversation script should be designed based on a **30-45 minute duration budget**. If the target customer is highly engaged and has a flexible schedule the conversation could last 60-90 minutes so allow yourself extra time.*

***Post-Conversation**: Set aside **15-30 minutes** for a post-conversation debrief. The debrief should cover the following questions:*

1. *What were the key learnings and their significance?*
2. *Were there any missed opportunities?*
3. *What adjustments, if any, are needed to the script, logistics, or other things for future conversations?*

Appendix 1: Best Practices for Customer Conversations

1. **Listen and Learn**. You should be listening at least 75% of the time and asking questions to address assumptions, clarify, and fill gaps that were identified in Workshop #1.

2. **Ask Open Ended Questions**. Where it makes sense, keep the questions open and broad to uncover new insights you hadn't anticipated. Don't lead the customer to a specific answer. It is best to hear an answer in a customers' own words.

3. **Probe Below the Surface**. Very often, you will receive a superficial answer so you may have to drill down. Probe with questions like "What do you mean by that? Can you explain that a little more? What else do you do? Why do you say that? How do you feel about that?"

4. **Don't Sell**. I know it is tempting to get into pitch mode and tell them all the great things about your offering. Remember, you are trying to learn. It is not about convincing them why they should care or think something different then you heard.

5. **Don't Go Solo**. Assign a notetaker to capture key quotes and insights so that you can focus on learning and asking probing follow-up questions. Have an advisor or mentor join the call to keep you open-minded and challenge your interpretation of the call.

6. **Learn, Iterate, and Explore**. Don't be afraid to probe into different areas, adapt your lines of inquiry, change your product strategy and/or adjust your value proposition as you hear repeated themes across interviews.

7. **Repeat Until You Don't Have To**. Keep on conducting interviews until you hear consistent themes from multiple sources across multiple organizations assuming they represent a big enough market segment.

8. **Respect and Give back**. The people you are interviewing are being generous with their time. You can build a positive and ongoing relationship by giving back to them. Stay punctual to the meeting start time and duration. Be appreciative by telling them what you learned and how much you value that insight. If possible, teach them something or share a different approach to their problem based on your subject matter expertise. This could happen during the initial conversation or in a follow-up exchange.

9. **Be Careful Who You Listen to**. People inherently want to be supportive and may tell you what they think you want to hear or perhaps they steer you to a pet project of theirs. It is important to look for consistent responses across organizations and individuals without leading the conversation. Pay attention to people with budget and buying power.