

Customer Discovery Report Card

Company Name _____ Date _____

Contact Name _____ Job Title _____ Interviewed By _____

Years in field _____ With Company _____ Reports to _____

(Circle one) Approves / Buys / Influences Sale

Key problems in my industry: (In priority order, as customer tells it)

1. _____
2. _____
3. _____

What our product solves / doesn't solve for customer:

Solves _____

Doesn't Solve _____

Key Solution elements: price – features – easy to use – training – support

Rate customer pain with key problem / need (5 is torture): 1 2 3 4 5

How they solve problem today: _____

Customer satisfaction with current solution (5 is very happy): 1 2 3 4 5

(Circle) Has workaround / Has budget to fix / Has tried and failed / Pressure to fix from above / different problem(s) customer faces / needs solved / wishes we solved:

"If I had a magic wand, a product would appear that..." _____

Company process for testing / buying new products (people / approvals / timing / bidding / other): _____

How / where they'd buy: _____

Where they go / read / learn about new products: _____

Key decision-maker / where to start / who else to see: _____

Best Estimate / # of units (initial): _____ to _____ year two: _____ to _____

Best Guess price _____ % Probability _____ sale month _____

Direct / channel _____

Is interview subject (circle)

Earlyvangelist / Advisory Board / Industry Influential Saboteur / C-Level

Referrals to others "like him or her".

(name) _____ (Company) _____

(name) _____ (Company) _____

(name) _____ (Company) _____

(name) _____ (Company) _____

(name) _____ (Company) _____

Follow-up opportunities:

(circle) return with product / return meet others / provide data, specs / sample / write order

Remember: referrals to other companies... can I call you again... send thank-you note

Other notes: