lab2sky

founder workbook / 02

customer discovery

learn from behaviour. design a useful pilot.

creation in motion

what you will leave with

a usable interview record, an access map and a pilot decision brief

for founders testing a problem, a customer group or a route to adoption.

time: 30 minutes to prepare; 25-35 minutes per conversation.

bring: one customer hypothesis, a way to recruit relevant participants and a private place for consented notes.

02 prepare to learn, not to persuade

03 ask questions that reveal behaviour

04 turn notes into an evidence map

05 agree a pilot that can end

06-07 your fillable working pages

download a copy before filling it in. use a pdf reader that supports forms, save it and reopen to check your entries. you can also print it or use the text edition. lab2sky does not receive your entries.

all examples and figures are illustrative, not lab2sky portfolio results or investment thresholds.

field notes / 01

prepare to learn, not to persuade

choose the decision this round of discovery should inform. the conversation is a way to examine reality, not a vote on your idea.

recruit around a shared situation

write a recruitment criterion tied to the problem. include people who use alternatives, stopped using a similar service or do not currently feel the problem strongly. friends and enthusiastic introductions are a convenient start but can create a biased picture. record how each participant was selected.

> worked example / illustrative
> for a hypothetical clinic administration tool, recruit practice managers who process referral paperwork weekly. include a practice that recently changed its process and one that decided against buying software.

check: do not call a convenience sample representative of the whole market.

give a clear introduction and choice

say who you are, what you are trying to understand and how long the conversation should take. ask permission before taking or recording notes and explain their intended use. participants should be able to decline a question. collect only what is needed for business discovery.

> worked example / illustrative
> "we are exploring how referral administration works. this is a learning conversation, not a sales demonstration. may i take notes for our product team? please do not include patient names or records."

check: record permission and any limits; permission to talk is not permission to publish.

assign roles and prepare a neutral sequence

one person can guide the discussion and another can note exact observations. if you work alone, leave time to write immediately afterward. prepare prompts rather than a rigid script. follow a relevant detail when it appears, and keep your product explanation until after learning about the current workflow.

> worked example / illustrative
> start with the participant's role, then ask for the last referral that caused extra work. walk through the sequence, people and consequences before asking how a new process gets approved.

check: avoid turning every answer into an opportunity to explain a feature.

field notes / 02

ask questions that reveal behaviour

ask about a specific event. separate the customer's words from the meaning you assign to them.

replace opinions with a recent example

a prediction about what someone might use is weak evidence of future purchase. ask them to reconstruct a real event and, where appropriate, show a non-sensitive artefact of the process. listen for frequency, workaround, consequence and trade-off. do not force a cost estimate when the participant cannot support one.

worked example / illustrative

instead of "would an ai assistant help?", ask "walk me through the last referral that needed a follow-up call. what triggered it, who handled it and what happened next?"

check: "that sounds useful" is feedback, not evidence of adoption.

probe the alternative and switching cost

understand why the current approach survives. it may be familiar, trusted, bundled with another service or cheap enough to keep. explore previous attempts to change and why they failed. your alternative must compete with existing behaviour, including doing nothing, not only with another startup.

worked example / illustrative

"what have you already tried?" may reveal that a previous system added duplicate data entry. the next question is what information staff must enter twice and why that handoff exists.

check: do not describe a customer's workaround as irrational because it looks inefficient.

find the decision and budget path

ask who proposes a change, approves spending, assesses risk and implements it. find out when those people meet and what evidence they need. a friendly user can explain a pain point without having authority to approve a pilot or buy a subscription.

worked example / illustrative

the practice manager uses the tool; the owner approves the fee; a software provider controls the integration. the interview ends with permission to ask the owner about the approval process, not with an assumed sale.

check: record the difference between an introduction, approval and a signed agreement.

field notes / 03

turn notes into an evidence map

a useful synthesis keeps contradictory evidence visible. it does not turn a handful of stories into a market statistic.

keep three columns in your notes

separate observation, interpretation and next check. an observation describes what was said or shown. an interpretation is your current explanation. the next check asks what would confirm or challenge that explanation. keep source codes and dates so another team member can trace the conclusion without exposing identities.

worked example / illustrative

observation: participant p03 described four follow-up calls yesterday. interpretation: missing information may drive the calls. next check: classify the reasons for follow-up in a permitted, de-identified sample.

check: do not convert an interviewee's estimate into an independently verified fact.

compare patterns without hiding disagreement

use a simple matrix: participant role, recent problem, workaround, consequence and next step. count responses within your actual sample and report the denominator. examine who did not share the problem. a difference in company size or workflow may reveal a more useful first customer group.

worked example / illustrative

four of six managers describe repeated missing details; two practices have no comparable issue because their referring partners use a standard form. the pattern suggests a workflow-specific segment, not universal demand.

check: a sample of six does not establish that two-thirds of the market will buy.

choose what to change in the hypothesis

write a short conclusion that links evidence to action. state the strongest support, the strongest challenge and the biggest remaining gap. choose whether to narrow the customer group, change the problem statement, test an intervention or stop. avoid collecting more interviews simply to postpone a difficult decision.

worked example / illustrative

the team narrows its first test to practices receiving inconsistent referral formats. it pauses automated triage and tests a completeness checklist because the discovery concerned administration, not clinical decision quality.

check: state which finding would make you reverse this decision.

field notes / 04

agree a pilot that can end

a pilot should have an owner and a decision at the end. it should not become unpaid, indefinite product support.

define the change, baseline and boundaries

agree who participates, what changes, what is measured and what stays outside scope. identify the people qualified to assess relevant risks. use the least sensitive data adequate for the test and obtain appropriate permissions. operational convenience does not remove privacy, clinical or other obligations.

worked example / illustrative

a two-week administration pilot measures incomplete forms per referral against an agreed baseline. it uses approved, de-identified fields and does not assess diagnoses, patient eligibility or treatment.

check: do not test a regulated or safety-critical claim through an informal customer interview.

write the end decision before starting

define the measurement period, responsibilities, cost cap and review date. agree the evidence needed for a next commercial conversation. a positive operational result and willingness to pay are separate questions. if the sample is small or the process changes mid-test, record that limitation before deciding to extend.

worked example / illustrative

illustrative rule: if staff complete the workflow with less repeat entry and the manager confirms the time saving, review a paid rollout proposal. the buyer still needs to approve the scope and price.

check: a pilot is not a paid contract unless the parties have actually agreed payment.

close the loop with the participant

summarise what you understood and ask what you missed. confirm the agreed follow-up and permissions. after the pilot, share the relevant findings, including weaknesses, in the form agreed with the participant. record continue, revise or stop and the person who owns that next step.

worked example / illustrative

"we heard that duplicate entry matters more than a new dashboard. we will send a one-page summary for correction, then ask whether a bounded checklist test is worth discussing."

check: an introduction or quote should only be shared in the way the participant authorised.

your working page / 01

prepare and record a conversation

use participant codes in shared notes. retain identifying details only where needed and appropriately protected.

decision and recruitment criteria

what will this conversation inform? who is relevant and how were they selected?

permission and role map

date, participant code, note/recording permission, user, buyer and gatekeeper.

recent event and current alternative

what happened, in what sequence, who acted, and what consequence followed?

observation / interpretation / next check

separate what was said or shown from your explanation and the evidence still needed.

synthesise and scope the pilot

complete one copy per interview round or pilot. retain contradictory evidence and unsuccessful results.

pattern and counter-evidence

include sample size, selection limits and the participants who did not share the problem.

pilot scope and access

who, where, permissions, baseline, intervention and what remains out of scope?

measurement and end decision

owner, dates, cost limit, evidence required and commercial decision maker.

findings and next action

what changed in your thinking? continue, revise or stop; owner and follow-up date.

further reading: user observation, y combinator >

continue online: customer access >