Observations

First, build a customer-problem statement. It's a little like an agile user story, and it is your first stake in the ground to help you understand who you should talk to. Like this: I am (3 unique characteristics of your customer). I want to (do something), but I can't because (surface problem), because (root cause), which makes me feel (emotion).

[sticky note: Loves to refer people- says they have people to refer, but no open jobs]

Now build empathy for your customer. Empathy can be an interview, an observation of your customer, or immersing yourself to experience the situation like your customer would.

When you interview a customer, be sure to ask questions that allow them to tell a story. Avoid yes/no or other closed-ended questions. No hypothetical questions, either. Ask about a time when something really happened, and how they dealt with it. Ask about behaviors and how they've tried to solve in the past. Dig for root causes, not surface problems. Keep asking why.

Debrief these interactions immediately with stickies and sharpies. These are your observations. They are the "what" of your customer's story. Concentrate on your observations: what did the customer say (quotes), do (tell you about their actions), think (their ideologies that drive them), and feel (the emotions that they experience). Look for patterns as you debrief. Place your observations in this column. Who's a customer of a solution to this problem? Who isn't?

Insights/ Motivations

Insights are the "why" of the "what". You observed your customer, now you must think about why they said what they said—what does it mean when they say that? Insights help you find root causes. And well written insights lead you to clear opportunity areas to drive value to your customer.

[sticky note: Current referral process is centered around jobs, not people]

Look at your groupings of observations. What are the observations that have the most stickies, or where did the most emotion come through? Concentrate your focus there. Why are these themes coming up over and over, and why does the emotion run high? Why does your customer say, think, feel, or do it that way? Ask the "5 whys" to get to root causes. Root cause problem identification will help you next as you identify the best opportunities to drive value to your customer.

The concept of "stuck" is a great way of applying the empathy you have gained for your customer. When someone is stuck, there's an outcome they are trying to achieve, but they can't get there because they are missing a key resource to pave the way. What is that outcome? Why do they want it? What are they doing now to try to get it? What might they be willing to do to get it?

Place your insights here.

Opportunity Areas

Your well-written insights should point to opportunity areas where you may be able to drive value to your customer. Ask, "because we believe that our customer is motivated in this way, how can we help the customer in a specific moment of need?" And--- "why would the customer emotionally respond?" Your offer in this area isn't a big solution; it will likely be the simplest thing that you believe will appear valuable to your customer and provoke them at an emotional level to behave in a new way to get that value. How you present that to your customer will be deter-mined when you craft your experiment. For now, think less about a specific solution. Instead, revisit why your customer is "stuck" and identify what they are missing from a conceptual standpoint to get to the outcomes that they want. Stuck usually boils down to missing resources. What are those resources? Why are they so important to getting your customer unstuck? What might they be willing to do to get that resource?

[sticky note: Collection of referrals even when there isn't a specific job opening]

Put your opportunity areas here.

Risky Assumptions

Now that you have some areas where you believe that you can drive value to your customer, it's time to look at it from the customer's viewpoint. What would prevent your customer from getting value from your offer? We phase these risky assumptions in the form of, "customer will (do something)". This allows you to compare assumptions apples-to-apples in terms of what they must actually do to get value. Think about it this way: if you had a spreadsheet with your project on it, what are those cells on the spreadsheet that, if they are zero, make the whole spreadsheet go to zero? There lies your risk! Document as many risky assumptions as possible, then rank them by risk, and by when they will become important--- right away, or later? Which assumptions are the riskiest? Which one will kill your attempt to drive value first if they are wrong? It's important to see this from the customer's view; remember your customer may not have the same logical view of the problem that you do. Stuck is an emotional state, so be ready to deal in an emotional space. Sometimes the simplest of behaviors are the ones that will torpedo your effort to drive value.

[sticky note: Employee will... refer friends/family even if there isn't a specific job]

Document those threats here.

Behavioral Experiment

Now that you have some risky assumptions, it's time to test them. People often don't do what they say they will do, and that's a huge risk to your work. So how do we test the "do" of what people "say"? Experimentation! Good experiments test specific behaviors that your customer must be willing to engage in to get value from your offer--- while asking for some type of currency to prove that they see enough value to "pay" for the privilege. So now ask, "What behavior on the part of the customer would reduce the risk around my assumption? What does my customer have to be willing to do to get value from this offer? What currencies does the customer deal in that he/she might pay?" Currency might by time, reputation, money, or something else of value.

[sticky note: Offer employee a form to refer without having to match to a particular job]

Most importantly, you don't have to build your big solution to test behaviors. For instance, if you need to test if your customer will participate in a carpool, you could present with an opportunity to get on a waiting list, even though you haven't built the platform to manage all the riders and drivers. The act of signing up for the list de-risks your next step forward. Next you might test if they will schedule a ride with someone. Again, you could send out the waiting list and ask the people to connect with each other. That behavior would be a strong signal that you customer is passionate about ridesharing.

Put your experiments here.