

Customer Call Guidelines

Participant teams must interview a minimum of five potential customers and/or stakeholders and summarize those interviews into a Customer Call Summary document that must be submitted along with the poster no later than 5 p.m. on May 21.

The goal of this deliverable requirement is to ensure that teams are constantly seeking external validation – in marketing, business, technical, and financial areas – for their proposed ideas.

Deliverable Requirements

The Customer Call Summary document should be no longer than two pages and include the following information:

- Name of Person Interviewed
- Role
- Company/Affiliation
- 3 Key Discoveries

See sample template.

Interview Best Practices

- Aim for 10- to 25-minute meetings. Be conscious of the customer's time.
- Try to identify the benefit your customer wants, not the features of your technology or solution.
- You want to collect information of their true problem, not necessarily affirmation of your technology or solution.
- Listen much more than you talk.
- DO NOT:
 - Try to sell your product/idea
 - Talk about your solution explicitly
 - Ask what they want
- DO:
 - Lead them to describe the problems they face
 - Understand the cost of those problems by talking about pain-points
 - Lead with "I am in a business competition and doing customer discovery..."
 - If necessary, talk about your solution only at the end of the call
- Sample questions:
 - Can you tell me how you typically solve this issue?

- How much does that cost / How much does your company lose?
- How do you go about purchasing that within your organization?
- Does your company find this to be a major issue on a larger scale?
- Is this issue an industry-wide problem?
- Why? (multiple times throughout the interview, this is valuable)
- End with:
 - What haven't I asked about that I should?
 - Who can you introduce me to?

Refer to *Sample Customer Call Script* on the following page.

Sample Customer Call Script

Opening

Hi, my name is [name], and I'm competing on a team in the UC Davis Little Bang! Poster Competition. We thought you may be able to offer some key insights and feedback regarding our business idea. We'll use your feedback to help refine our proposal for the poster competition.

Our company provides [describe product or service; 1-2 sentence pitch].

Is now a good time for you to talk? Do you have a couple of minutes?

- If Yes - proceed to Qualifying Questions.
- If No, request a better time to call back and note that time.

(REMINDER: Limit the conversation to 5-10 minutes and keep track of the time.)

Qualifying Questions

- Our product/service solves [describe problem]. Is this a problem that you've experienced, and if so, how much or how often?
- How do you currently solve this problem?
- Our [product/service] offers a solution to this problem by [describe solution provided]. If you had access to this solution, do you think you would use it?
- What about this solution is potentially valuable to you?
- What are your biggest concerns?
- If this product was available today, what would you want to see or know before you'd consider using it?

Closing / Next Steps

- Is there anything else I should know?
- Is there another person at your company who I could reach out to for additional feedback?
- (possible test of interest) As we develop this product/service, would it be okay if I contacted you later for additional feedback?
- Feel free to call or email me if you have any questions or interest in our idea. Do you need my contact information?
- THANK YOU so much for your time. We really appreciate it!