

Lab Zero Customer Development 'Set Up' Template

This template shows mock data and is part of Lab Zero's [Customer Development playbook](#).

Questions? Contact us at labzero.com/contact

Step 1: Set Up

First, we like to assess our existing and potential customers. We start by deciding team roles and responsibilities, assessing where we are today with customer development, and stating our team's internal learning goals. The following set up activities do not have to be done in a certain order. Set up depends on what we know and what gaps we have.

Roles

Lead	Responsible for driving the five steps of the customer development plan	
Scheduler	Responsible for obtaining customer contact information and scheduling interviews	
Interviewer	Responsible for leading the interviews	
Notetaker	Responsible for taking notes during each interview	
Advocate	Responsible for sharing insights to the team, facilitating sensemaking efforts, demonstrating any results to the team, and demonstrating value to leadership	

Assessment: Where are we today?

Do we have any learning goals? What are we most curious about our customers?	
Is the product live and do we already have existing customers?	
Are we trying to identify new customer segments?	
Who on the team already talks to customers? e.g. product leads, user researchers, sales, marketing...	
Are we already doing customer development and talking to customers? What have we learned so far?	

Who do we want to meet, and why? How can we contact those customers?	
Are we having trouble identifying customers? Can we talk to subject matter experts or stakeholders to get unstuck? If not, who can we ask for guidance?	

Learning goals

What do we think we know about our customers, and is it still relevant? How do we know that's still correct?	
What don't we know about our customers?	
When it comes to our customers, what are we curious about?	
What are our riskiest assumptions?	
Why does a customer have a problem?	
What does the customer do to solve this problem (without using our product)?	
How does our product currently serve the customer?	
How does our competition solve the problem better than we do?	

What are the team's learning goals?

Primary learning goal	
Learning goal	
Learning goal	