

# Beneficiary Discovery

# How to win

- Talk to a lot of beneficiaries
- Ask the right questions
- Take good notes



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- Take good notes



IF I WERE OUR TEENAGE  
GIRL TARGET, I WOULD  
LOVE OUR NEW PRODUCT.

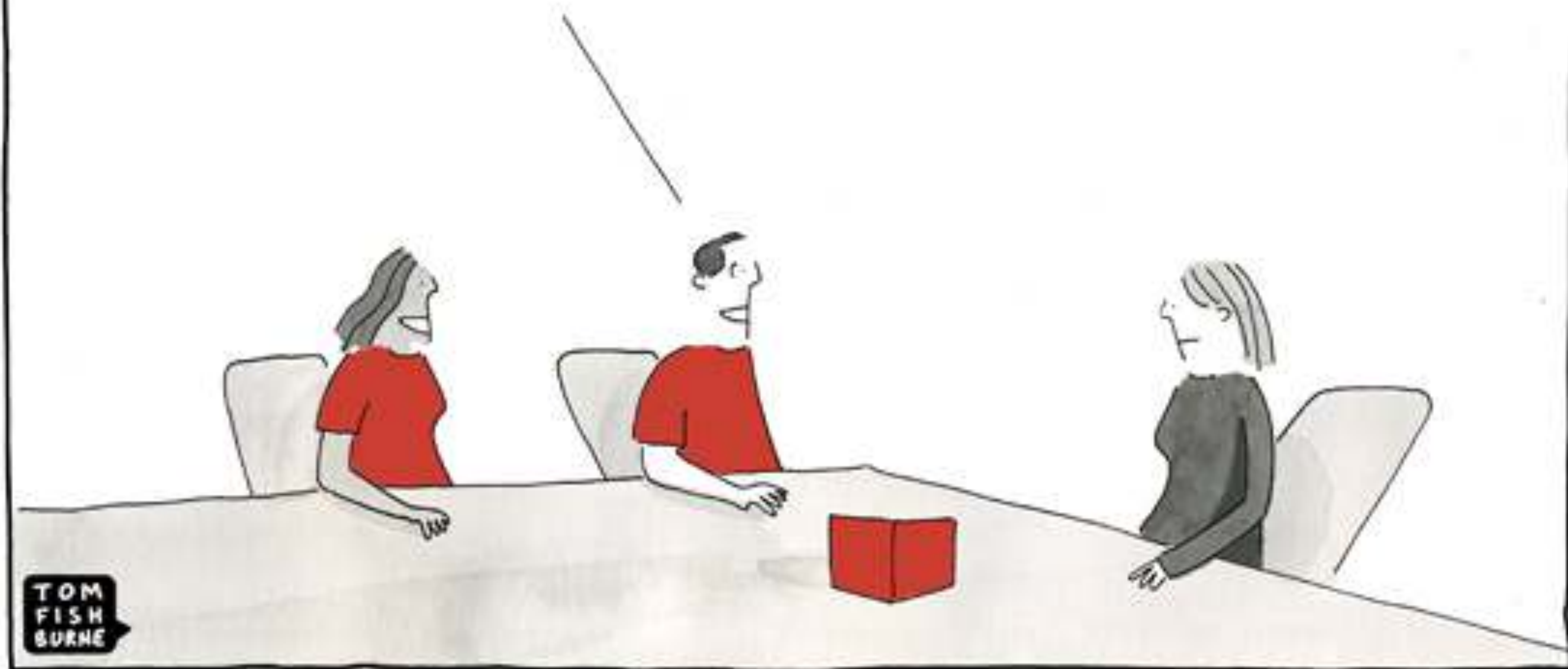
HAVE YOU ACTUALLY  
TALKED TO ANY TO  
MAKE SURE?

WHAT? AND  
LEAVE THIS  
ROOM?



TOM  
FISH  
BURNE

BE COMPLETELY HONEST AND TELL US WHAT YOU THINK OF THIS PRODUCT THAT WE'VE SLAVED OVER NIGHTS AND WEEKENDS WITHOUT SLEEP OR A SALARY BECAUSE WE THINK IT'S SUCH A COOL IDEA.



# Interview Tips

- 1 question can often be enough to get everything you need
- Don't say anything — long pauses, but stay engaged
- The interview is about them, and their knowledge
- The less you say during the interview, the better (after establishing rapport)
- It will not feel right at first
- Look for emotions, pull out more
- Ask for specific instances — avoid composites, or future — help participants re-create specific instances
- If you focus on pain points, you can miss the larger problems — the bigger opportunity may come from understanding why — how did we get here?

# Start with a standard intro

Hi \_\_\_\_\_, thanks for jumping on the call. My name is \_\_\_\_\_, and I'll be conducting the interview today. My colleague \_\_\_\_\_ is also on the line, taking notes.

We're a team of Stanford students doing some research with \*PROBLEM SPONSOR\*, to better understand \*THE PROBLEM SUMMARY\*. The calendar event we sent ends at 3:30, does that time still work as a stopping point?










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If you feel uncomfortable answering any of the questions or the answer is classified, just let me know and we can skip it. We've got a ton of questions, is it ok to get started?

“Questions you need to *answer*”  
≠ “Questions you need to *ask*”

**The Mission Model Canvas**

Mission/Problem Description: \_\_\_\_\_ Designed by: \_\_\_\_\_ Date: \_\_\_\_\_ Version: \_\_\_\_\_

Key Partners 	Key Activities 	Value Propositions 	Buy-in & Support 	Beneficiaries 
	Key Resources 		Deployment 	
Mission Budget/Cost 			Mission Achievement/Impact Factors 	



# Don't ask leading questions.

- **Leading Question:** “How angry do you usually feel when a repair request fails to go through successfully?”
- **Non-leading Question:** “Recall a time when a repair request failed to go through successfully. How did you feel?”

# Ask about specific incidents in the past, when possible.

- **Speculative Question Based on Imagination:** “Tell me what goes on in your head when a repair request fails to go through successfully.”
- **Context-based Question Grounded in Reality:** “Tell me what went on in your head the last time a repair request failed to go through successfully.”

# Ask more open-ended questions.

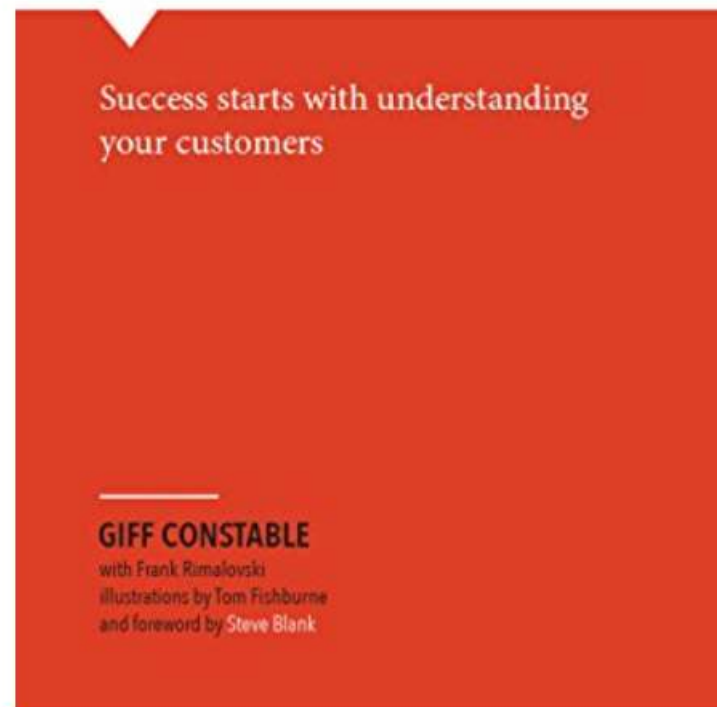
- **Specific Question:** “What was the last repair request you submitted?”
- **Open-ended Question:** “Tell me more about the last time you submitted a repair request.”

**Don't be afraid to just ask  
“Why?”**

**Close with, “Can you recommend anyone else we should talk to?”**

Look inside ↴

# TALKING TO HUMANS



## Talking to Humans: Success starts with understanding your customers Kindle Edition

by [Giff Constable](#) (Author), [Tom Fishburne](#) (Illustrator), [Frank Rimalovski](#) (Editor)

★★★★★ 55 customer reviews

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<b>Kindle</b> <b>\$0.99</b>	<b>Paperback</b> \$11.69
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With a foreword from Steve Blank, Talking to Humans is a practical guide to the qualitative side of customer development, an indispensable skill for vetting and improving any new startup or innovation. This book will teach you how to structure and run effective customer interviews, find candidates, and turn learnings into action.

Length: 89 pages

Word Wise: Enabled

Enhanced Typesetting: Enabled

Page Flip: Enabled

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# Learn more:

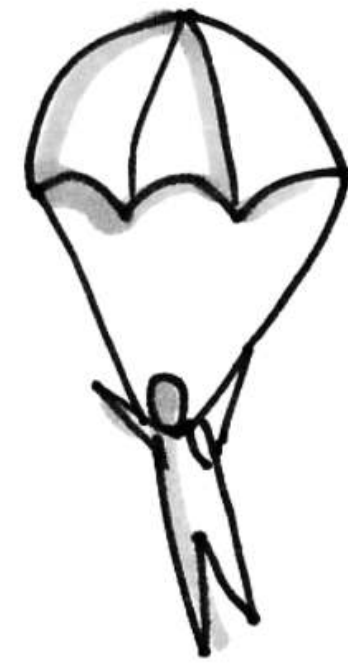
[talkingtohumans.com](http://talkingtohumans.com)

# The Real Startup Book

Find the right product for the right customers.  
Based on the experience of 40+ lean  
practitioners.



GET THE BOOK



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[realstartupbook.com](http://realstartupbook.com)

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# Progressive Summarization

A Practical Technique for Designing Discoverable  
Notes

# Tiago Forte

[fortelabs.co](http://fortelabs.co)



**Tiago Forte**

@fortelabs

Founder of productivity  
consultancy/training firm Forte Labs,  
editor at Praxis blog [praxis.fortelabs.co](http://praxis.fortelabs.co)  
Ask me anything: [molly.com/tiago.forte](http://molly.com/tiago.forte)

📍 San Francisco

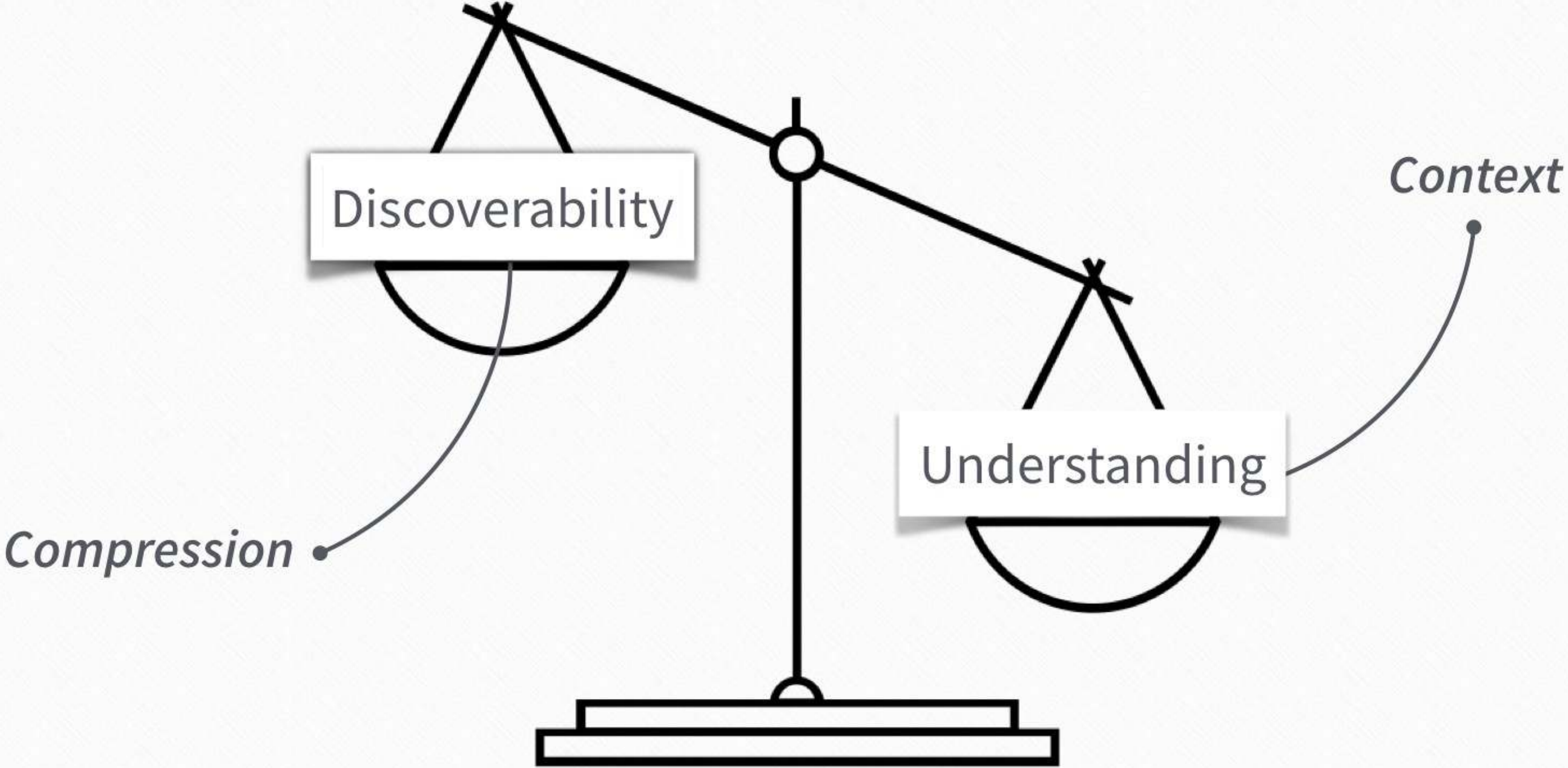
🔗 [fortelabs.co](http://fortelabs.co)

📅 Joined September 2013

# Designing discoverable notes

- Future You doesn't necessarily trust that everything Past You put into your notes is valuable.

# Note Design



## Postrationalism

## Layer 1: Notes

Postrationalism

<http://thefutureprimaeval.net/postrationalism/>

"Additionally, postrationalists have an appreciation for tradition, ritual, modes of experience beyond detached skepticism, "non-rational" sociopsychological phenomena, and other things traditionally rejected by skeptics and rationalists."

"We can't really replace common sense and intuition as the basis of reasoning. Attempts to virtualize more "correct" principles of reasoning from math and cognitive science in explicit deliberative reasoning are unrealistic folly. We can learn useful metaphors from theory, and use mathematical tools, but theory cannot be the ultimate foundation of our cognition; practical reasoning is either based on reasonable common sense, or bogus."

"It is therefore better to treat the mind as a holistic and teleological black box system, and deal with it on its own terms; experience, intuitively understandable evidence, good ideas and arguments, and actual incentives. The mind is already well-tuned by evolution, and can only become wiser with lots of specific knowledge and experience, rather than more rational with a few high-impact cognitive hacks."

"Some rationalists have a reductionistic and mechanistic theory of mind. They see the mind made up of a patchwork of domain-specific biased heuristic algorithms which can be individually outsmarted and hacked for "debiasing". While the mind is ultimately a reducible machine, it is complex, poorly understood, very clever, and designed to work as a purposeful whole. You generally can't outsmart your mind"

"Ideas about what's important and valuable are usually thought of as fundamental truths or moral axioms, but are often better modelled as shifting social fictions, local residue of larger-than-human social phenomena, tribal markers, and so on."

"Propositional belief is too narrow of a concept to model all desirable cognitive content. It is better to think in terms of a general continuum of forms of cognitive content: memories, models, heuristics, skills, procedures, habits, and such, with truth as a sometimes-applicable proxy for usefulness rather than an always-applicable end in itself"

"Postrationalism" is our reaction against some of the silliness of modern conceptions of "rationality", while keeping the strong emphasis on correct thinking, skeptical evidence-based inquiry, and field performance as the final test of ways of thinking. Postrationalists tend to be concerned with matters of social psychology and how societies work more than traditional rationalists"

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# Progressive Summarization

Layer 1: Notes



# Progressive Summarization

**Layer 2: Bold passages**



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Layer 3: Highlighted passages

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Layer 1: Notes



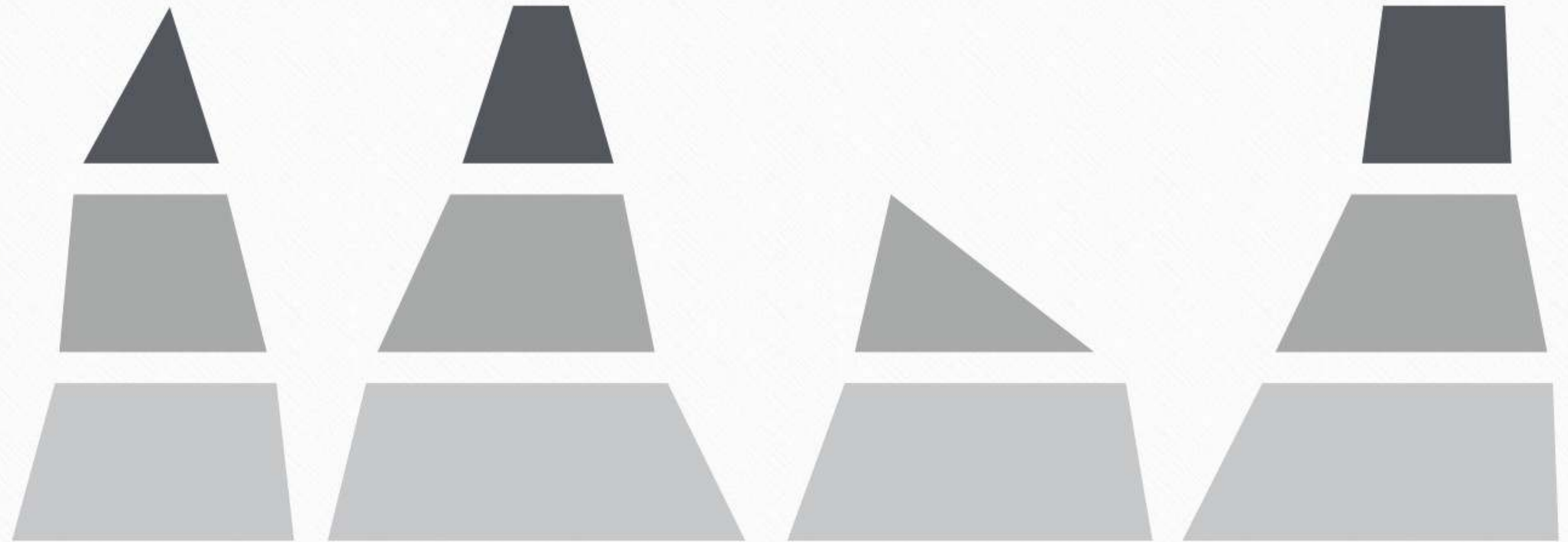
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Layer 4: Mini-summary

Layer 3: Highlighted passages

Layer 2: Bold passages

Layer 1: Notes



**Use resonance as your criteria**

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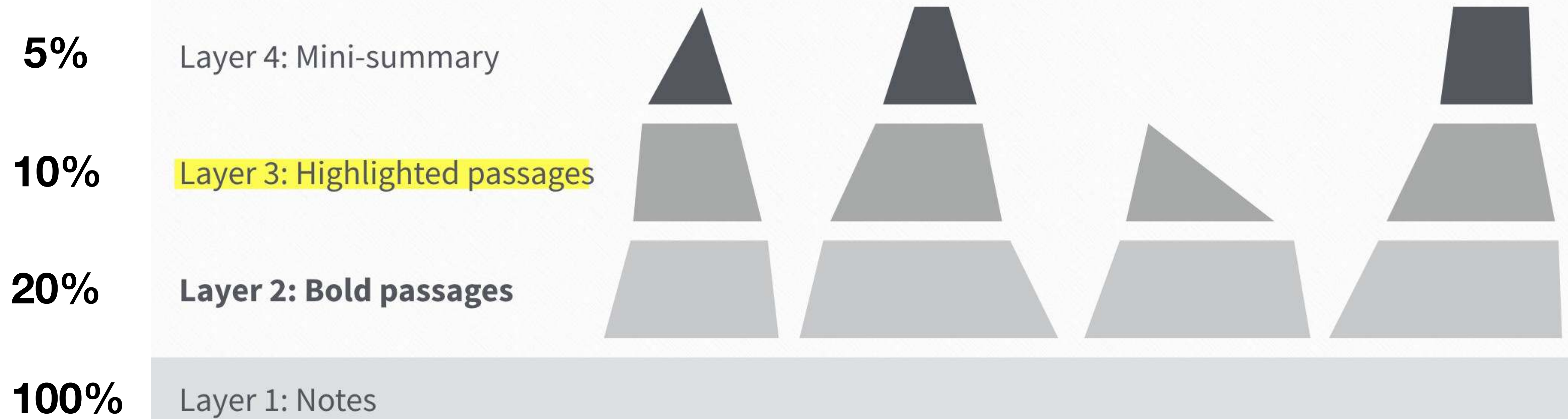
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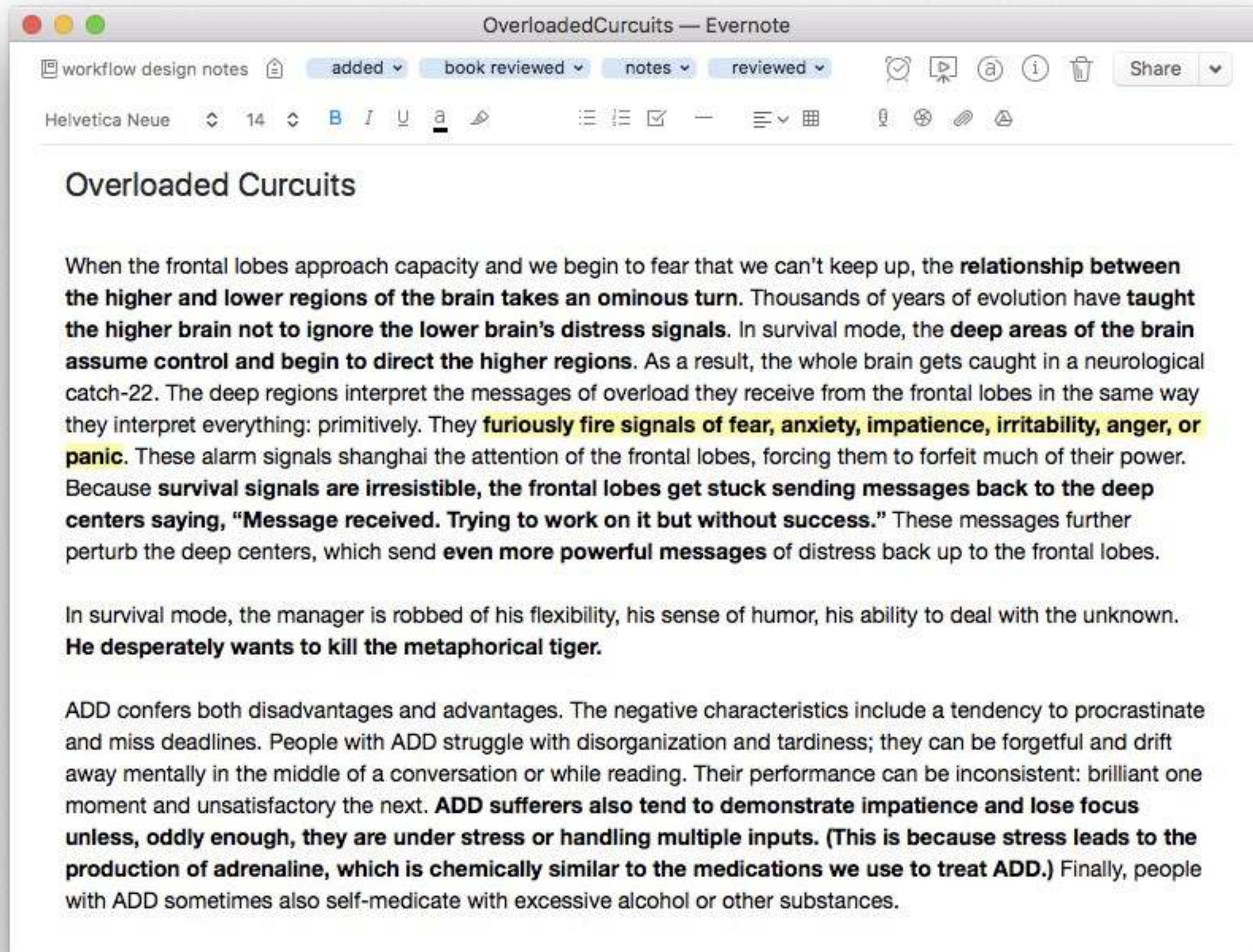
# Progressive Summarization





## 4. Keep your notes glanceable

### Glanceable



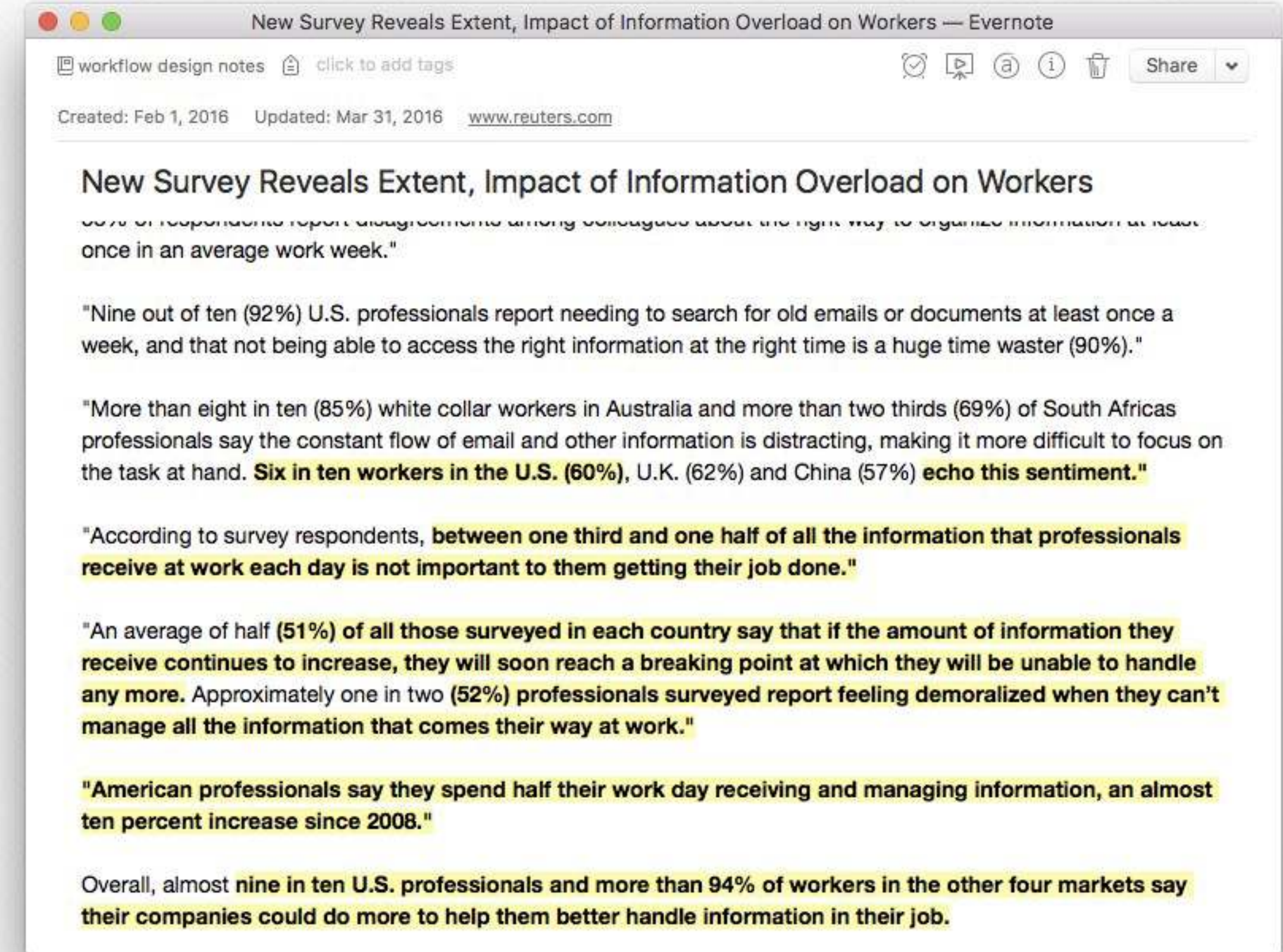
Overloaded Curcuits

When the frontal lobes approach capacity and we begin to fear that we can't keep up, the **relationship between the higher and lower regions of the brain takes an ominous turn**. Thousands of years of evolution have **taught the higher brain not to ignore the lower brain's distress signals**. In survival mode, the **deep areas of the brain assume control and begin to direct the higher regions**. As a result, the whole brain gets caught in a neurological catch-22. The deep regions interpret the messages of overload they receive from the frontal lobes in the same way they interpret everything: primitively. They **furiously fire signals of fear, anxiety, impatience, irritability, anger, or panic**. These alarm signals shanghai the attention of the frontal lobes, forcing them to forfeit much of their power. Because **survival signals are irresistible, the frontal lobes get stuck sending messages back to the deep centers saying, "Message received. Trying to work on it but without success."** These messages further perturb the deep centers, which send **even more powerful messages** of distress back up to the frontal lobes.

In survival mode, the manager is robbed of his flexibility, his sense of humor, his ability to deal with the unknown. **He desperately wants to kill the metaphorical tiger.**

ADD confers both disadvantages and advantages. The negative characteristics include a tendency to procrastinate and miss deadlines. People with ADD struggle with disorganization and tardiness; they can be forgetful and drift away mentally in the middle of a conversation or while reading. Their performance can be inconsistent: brilliant one moment and unsatisfactory the next. **ADD sufferers also tend to demonstrate impatience and lose focus unless, oddly enough, they are under stress or handling multiple inputs. (This is because stress leads to the production of adrenaline, which is chemically similar to the medications we use to treat ADD.)** Finally, people with ADD sometimes also self-medicate with excessive alcohol or other substances.

### Not glanceable



New Survey Reveals Extent, Impact of Information Overload on Workers

90% of respondents report disagreements among colleagues about the right way to organize information at least once in an average work week."

"Nine out of ten (92%) U.S. professionals report needing to search for old emails or documents at least once a week, and that not being able to access the right information at the right time is a huge time waster (90%)."

"More than eight in ten (85%) white collar workers in Australia and more than two thirds (69%) of South Africa's professionals say the constant flow of email and other information is distracting, making it more difficult to focus on the task at hand. **Six in ten workers in the U.S. (60%), U.K. (62%) and China (57%) echo this sentiment.**"

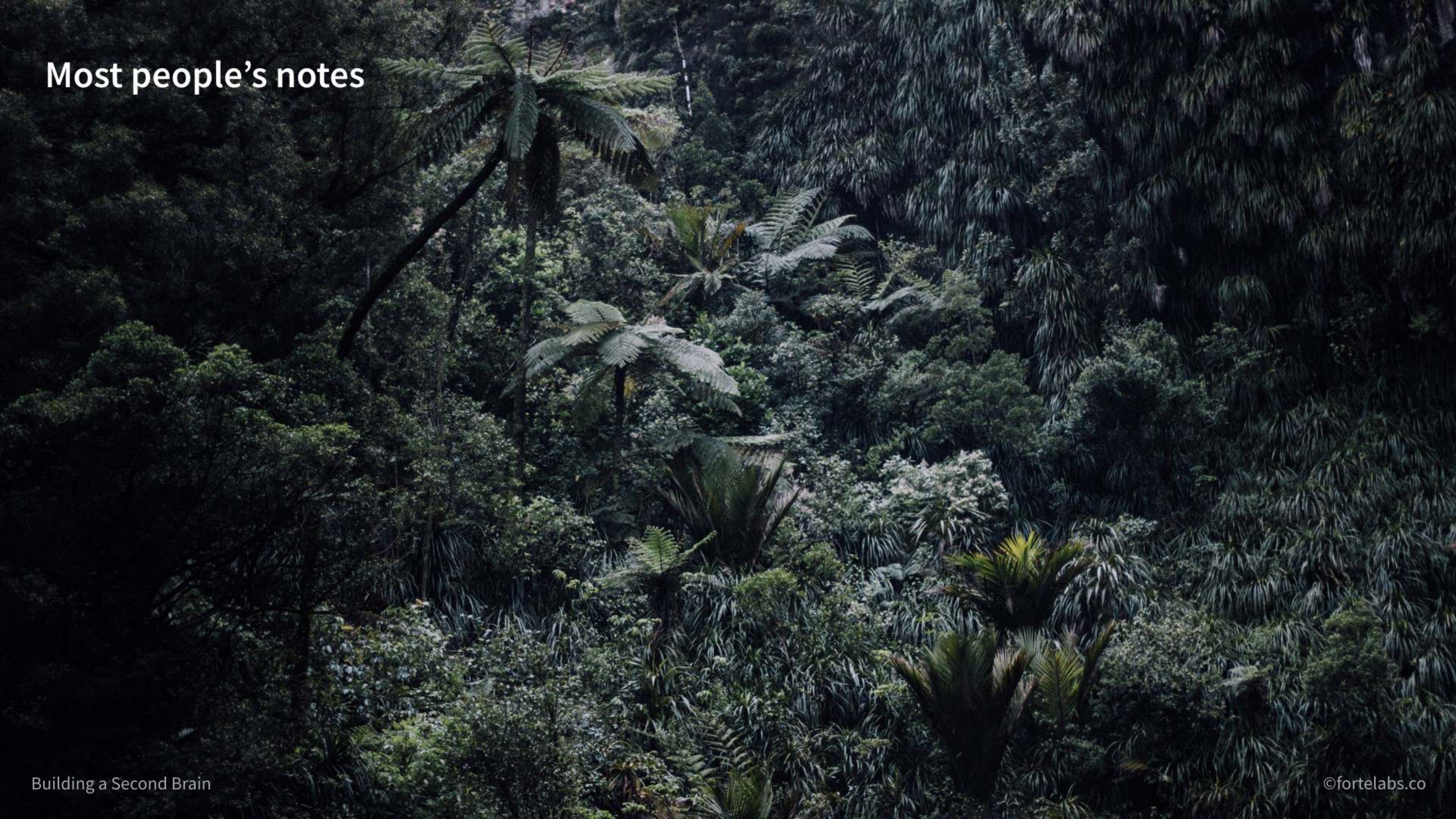
"According to survey respondents, **between one third and one half of all the information that professionals receive at work each day is not important to them getting their job done.**"

"An average of half (51%) of all those surveyed in each country say that if the amount of information they receive continues to increase, they will soon reach a breaking point at which they will be unable to handle any more. Approximately one in two (52%) professionals surveyed report feeling demoralized when they can't manage all the information that comes their way at work."

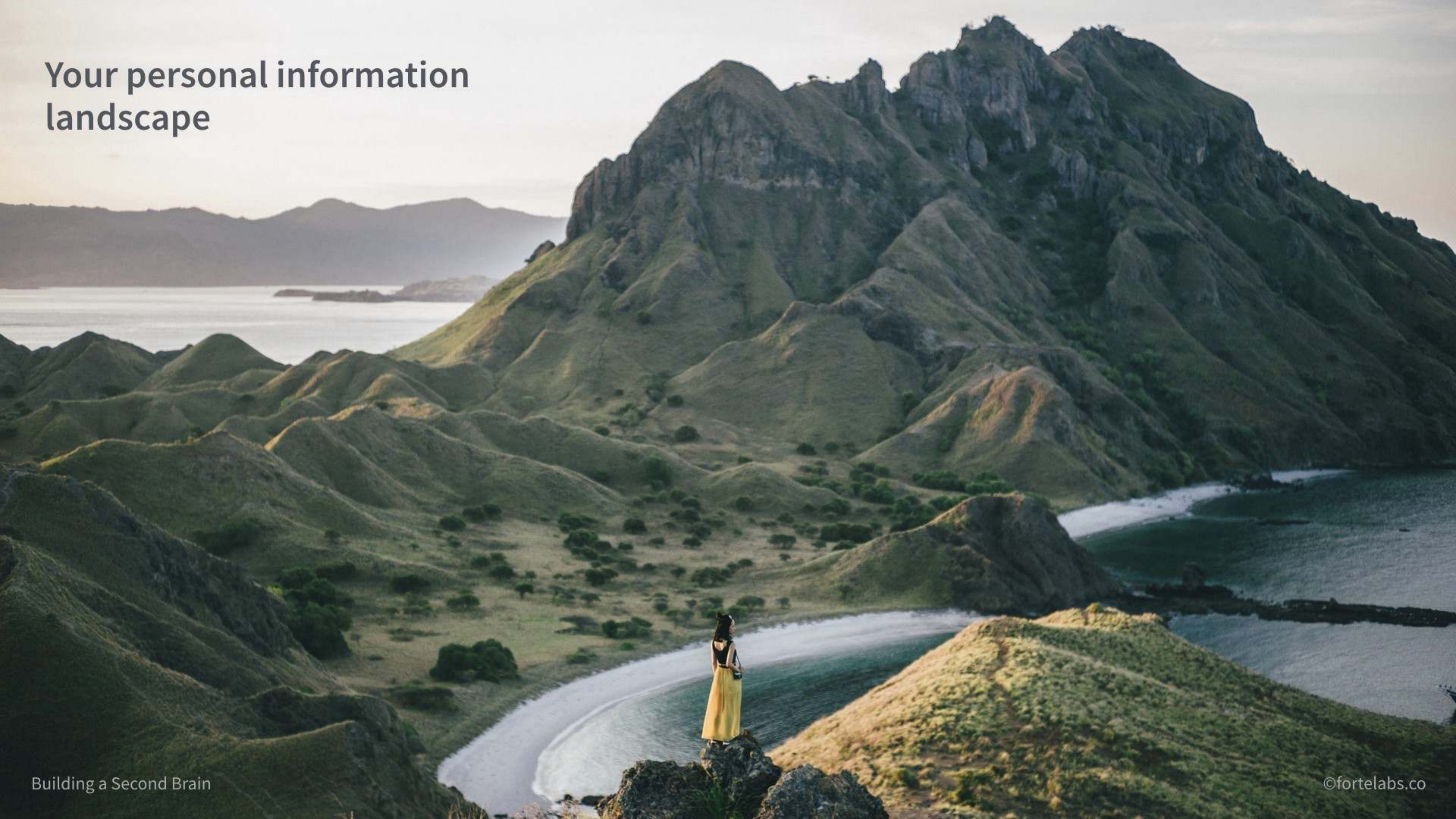
"American professionals say they spend half their work day receiving and managing information, an almost ten percent increase since 2008."

Overall, almost nine in ten U.S. professionals and more than 94% of workers in the other four markets say their companies could do more to help them better handle information in their job.

Most people's notes



# Your personal information landscape





# **BUILDING A SECOND BRAIN**

**CAPTURE, ORGANIZE, AND SHARE  
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**Learn more:**

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