Customer snapshot

WORKSHEET 1 OF 8

Define one customer in one recognizable situation.

Example: freelance designers juggling feedback across several client projects.

Type into the fields and save a local copy, or print and write by hand. For long answers, continue in your own document.

My customer is

Their current situation is

The recurring problem is

The consequence is

Their current workaround is

I can find these people through

My biggest untested assumption is

Evidence log

WORKSHEET 2 OF 8 / RECORD 1

Use one page per observation. Duplicate or print extra pages as needed.

Record a source and separate what you observed from your interpretation.

Date and source link

Customer situation

Problem in their own terms, briefly paraphrased

Consequence

Current workaround

Evidence of spending, if any

What this supports

What it does not prove

Evidence log

WORKSHEET 2 OF 8 / RECORD 2

Use one page per observation. Duplicate or print extra pages as needed.

Record a source and separate what you observed from your interpretation.

Date and source link

Customer situation

Problem in their own terms, briefly paraphrased

Consequence

Current workaround

Evidence of spending, if any

What this supports

What it does not prove

Evidence log

WORKSHEET 2 OF 8 / RECORD 3

Use one page per observation. Duplicate or print extra pages as needed.

Record a source and separate what you observed from your interpretation.

Date and source link

Customer situation

Problem in their own terms, briefly paraphrased

Consequence

Current workaround

Evidence of spending, if any

What this supports

What it does not prove

Alternatives

WORKSHEET 3 OF 8 / RECORD 1

Use one page per alternative. Research three alternatives to start.

An advertised price shows an offer exists; it does not establish sales volume.

Product or service and URL

Who it appears to serve

Outcome and format

Advertised price and date checked

What customers praise

What customers criticize

A possible gap to investigate

Alternatives

WORKSHEET 3 OF 8 / RECORD 2

Use one page per alternative. Research three alternatives to start.

An advertised price shows an offer exists; it does not establish sales volume.

Product or service and URL

Who it appears to serve

Outcome and format

Advertised price and date checked

What customers praise

What customers criticize

A possible gap to investigate

Alternatives

WORKSHEET 3 OF 8 / RECORD 3

Use one page per alternative. Research three alternatives to start.

An advertised price shows an offer exists; it does not establish sales volume.

Product or service and URL

Who it appears to serve

Outcome and format

Advertised price and date checked

What customers praise

What customers criticize

A possible gap to investigate

Conversation notes

WORKSHEET 4 OF 8 / RECORD 1

Use one page per conversation. Ask about a recent real experience.

Capture contrary evidence too. Permission to follow up is not a purchase.

Customer fits the intended situation because

Recent example

Current solution and spending

Biggest consequence

Buying concern

Evidence contradicting my assumption

Follow-up permission

Conversation notes

WORKSHEET 4 OF 8 / RECORD 2

Use one page per conversation. Ask about a recent real experience.

Capture contrary evidence too. Permission to follow up is not a purchase.

Customer fits the intended situation because

Recent example

Current solution and spending

Biggest consequence

Buying concern

Evidence contradicting my assumption

Follow-up permission

Conversation notes

WORKSHEET 4 OF 8 / RECORD 3

Use one page per conversation. Ask about a recent real experience.

Capture contrary evidence too. Permission to follow up is not a purchase.

Customer fits the intended situation because

Recent example

Current solution and spending

Biggest consequence

Buying concern

Evidence contradicting my assumption

Follow-up permission

One-page offer

WORKSHEET 5 OF 8

Describe the smallest product that helps complete one specific task.

Example outcome: a completed tracker and a clear next action, not guaranteed income.

Working title

Intended customer and situation

Specific task or outcome

What the buyer receives

How each item helps

Required tools, skills, or access

What is outside the scope

Price to test

Strongest buying concern

Honest answer and supporting evidence

Delivery method and timing

Test plan

WORKSHEET 6 OF 8

Set your review point and limits before starting the test.

Choose one primary action to measure. An interest test does not establish willingness to pay.

Assumption I am testing

Customer segment

Offer version and price

Channel

Action I will ask for

Start and review dates

Maximum money and time I will spend

What would justify another small test

What would make me change the offer

What would make me stop this version

Tracking

WORKSHEET 7 OF 8 / RECORD 1

Use one page per date and channel. Keep test orders separate.

Revenue is not profit. Record costs and refunds, and use consistent metric definitions.

Invitations or relevant content exposures, where measurable

Qualified page visits, where measurable

Requests for details

Checkout starts, where measurable

Completed customer purchases

Refunds

Revenue actually collected

Advertising and transaction costs

Main questions or objections

Tracking

WORKSHEET 7 OF 8 / RECORD 2

Use one page per date and channel. Keep test orders separate.

Revenue is not profit. Record costs and refunds, and use consistent metric definitions.

Invitations or relevant content exposures, where measurable

Qualified page visits, where measurable

Requests for details

Checkout starts, where measurable

Completed customer purchases

Refunds

Revenue actually collected

Advertising and transaction costs

Main questions or objections

Decision record

WORKSHEET 8 OF 8

Base the next decision on actual evidence and its limitations.

GO means the next limited step, not proof of a scalable business.

What actually happened

What I expected

Strongest supporting evidence

Strongest conflicting evidence

Important limitations

Current decision: GO / ITERATE / NO-GO

One next action

Next review date or trigger