

SOSE Pathways: Customer Discovery

A practical guide to running effective customer conversations

Overview

Customer discovery is one of the most important skills for early-stage teams.

A common pattern:

- Founders default to building
- It feels productive
- But it's often based on assumptions

The reality:

If you're not regularly speaking to customers, you're making decisions without enough signal.

The goal

Not validation. Not proving an idea is right.

Understanding how things actually work in the real world.

2. The core principle (The Mom Test)

Everything builds from a simple idea:

Talk about the customer's world, not your idea.

Why this matters:

- People tend to be polite and encouraging

- If you present your idea, they'll often respond positively
- If you ask about their behaviour, you'll get more accurate insight

3. Go in with intent (Top 3 questions)

Before any conversation, be clear on what you want to learn.

For example:

- Do they experience this problem?
- How significant is it?
- What do they currently do instead?
- Where does that approach fall short?

Keep this focused: 2-3 learning goals per conversation.

If you're not clear on what you're trying to learn, you'll tend to get general answers.

4. Start with real behaviour (not opinions)

This is one of the most important shifts.

Less useful:

- "Would you use this?"
- "Do you like this idea?"

More useful:

- "Tell me about the last time you..."
- "Can you walk me through what happened?"

People are far better at describing what they've done than predicting what they might do.

Example questions

- "Tell me about the last time you dealt with this"
- "What did you do first?"

- “What happened next?”
- “What did you use along the way?”

Give space for detail. Don't rush to the next question.

5. Understand the problem (without leading)

Avoid describing the problem for them.

Instead:

- Let them explain it in their own words
- Follow up to understand depth and context

Useful follow-ups

- “How often does that happen?”
- “What’s frustrating about that?”
- “When does it tend to break down?”
- “What do you do when that happens?”

This is where the most valuable insight tends to emerge.

6. Explore current solutions (your real competition)

Your main competition is usually what people already do today.

This might include:

- Manual processes
- Workarounds
- Existing tools
- Or doing nothing

Ask:

- “How do you handle this today?”
- “Why that approach?”
- “What works well?”

- “What doesn’t?”

If you hear:

- “It’s fine”
- “It works well enough”

Follow up with:

- “What does ‘well enough’ look like in practice?”
- “When does it stop working?”

The limitations of current approaches are often where opportunities sit.

7. Avoid mentioning your idea too early

Introducing your idea early can unintentionally shape the conversation.

If you mention your idea too early, you reduce how much you can learn.

Focus first on:

- Their behaviour
- Their context
- Their challenges

Only introduce your idea once you have a clear understanding of their world.

8. When you do introduce it (lightly)

Frame your idea based on what they’ve told you:

- “Based on what you’ve described, I’m exploring something that...”
- “Does that overlap with your experience?”

Then explore:

- “What part of that feels useful?”
- “What part doesn’t?”
- “What concerns would you have?”

Avoid:

- “Would you pay for this?”
- “Do you like it?”

9. Look for signals (not compliments)

It's important to distinguish between encouragement and real signals.

Stronger signals:

- “I'd use this regularly”
- “I'd switch from what I do today”
- “This is a real problem for me”

Weaker signals:

- “That's interesting”
- “Nice idea”
- “I can see people using it”

Positive feedback is helpful, but behaviour and intent are more reliable indicators.

Making Sense of Conversations

Running conversations is only part of the process.

The real value comes from how you interpret and act on what you hear.

10. Quote → Insight → Action

A simple structure for turning conversation notes into insight and progress.

1. Quote (what was said)

Capture this as directly as possible.

“I spend a lot of time trying to find things, and it slows everything down.”

2. Insight (what it means)

Interpret the underlying issue.

- Time cost is high
- The issue is recurring
- It affects overall flow

3. Action (what you do)

Translate into a decision or next step.

- Prioritise speed and accessibility
- Reflect this in messaging
- Test solutions that reduce friction

The key point: conversations should lead to clear actions.

11. Affinity Mapping (finding patterns)

Individual conversations can be misleading in isolation.

You're looking for patterns across multiple conversations.

How to do it

1. Capture quotes and insights (one per note)
2. Place them on a board (e.g. Miro)
3. Group similar themes together

Typical themes might include:

- Time or effort required
- Workarounds or manual processes
- Points where things break down
- Emotional responses (e.g. frustration, friction)

What to look for

Patterns in behaviour.

Patterns indicate:

- What is consistent
- What is frequent
- What matters most

12. Turning patterns into decisions

Once patterns emerge, you can begin to prioritise.

Ask:

- Which problems appear most often?
- Which seem most impactful?
- Where are people already investing effort to solve them?

Then use this to:

- Focus your product direction
- Refine your value proposition
- Decide what to test or build next

What good discovery gives you

After a series of conversations, you should have clarity on:

- Who experiences the problem most strongly
- How they describe it (in their own language)
- What they currently do
- Where those approaches fall short
- What matters most to them

From there:

- Messaging becomes clearer
- Product decisions become more focused
- Progress becomes more efficient

Final takeaway

Most teams spend too much time building and not enough time learning.

Strong customer discovery helps you:

- Reduce wasted effort
- Make better decisions
- Build with greater confidence