BOOTSTRAP
— YOUR BUSINESS —

FREE WORKSHEET · USE IT IN DISCOVERY

Customer Discovery Worksheet

Plan your conversations with real people, and write down what they actually said, not what you hoped they'd say.

Learn what's true before deciding what to build.

Use this when you have a guess about a customer's problem and need real evidence before putting in more time or money. Use one copy per conversation.

WHAT YOU'LL DO	WHAT YOU'LL HAVE	NOT YET
Prepare for one conversation, ask about what really happens, write down what you learn, and pick a next step.	Better evidence about the problem, what the person does today, and your next small step.	You're not deciding your product, price, brand, website, or sales pitch.

01 Prepare

Know who you're talking with and what you want to learn.

Who are you talking with?
The person, or the kind of customer they are.

Why might this person have the problem?

What guess are you trying to learn about?
What belief could this conversation strengthen, weaken, or complicate?

> **Make your guess specific**
> Weak: “People probably hate bookkeeping.” Better: “Independent contractors lose time sorting receipts because their records are spread across several places.”

DO

- Ask about things that actually happened.
- Let them use their own words.
- Ask follow-up questions.
- Listen more than you talk.

AVOID

- Pitching your solution.
- Explaining why your idea is good.
- Steering toward the answer you want.
- Asking them to predict what they'd buy.

Why this matters
What people did in the past is stronger evidence than guesses about what they might do in the future.

02 Ask and listen

Use these questions as a guide, and follow what the person actually says.

START WITH THEIR WORLD

1. **What happens today?** Walk me through how you handle this now.

2. **Where does it get hard?** Where does it get frustrating, slow, expensive, or risky?

GET SPECIFIC

3. **Tell me about the last time.** What happened? What did you do next?

4. **How often does this happen?** Look for how often, not just how bad.

5. **What happens when it goes badly?** What does it lead to?

WHAT THEY ALREADY DO

6. **What do you do about it now?** Their current workaround or alternative.

7. **What works well about that?** What they like about how they do it today.

8. **What doesn't?** What they dislike or wish were easier.

WHAT IT COSTS

9. **What does it cost you today?** Time, money, effort, stress, delays, or missed chances.

10. **What else have you tried?** What happened?

Don't turn this into a script

The goal is understanding, not getting through all ten questions. Useful follow-ups: “Tell me more about that.” “What did you do next?” “What did that cost you?”

03 Write it down

Write down what matters before your memory turns it into your own opinion.

Keep these separate

What the person said or did, and what you think it means.

What they said

Phrases they used, in their own words.

What they actually do

What they've done, paid for, put off, improvised, avoided, or stopped doing.

What they use now

Their current workarounds or alternatives.

What the problem costs them

Time, money, effort, stress, delays, or missed chances.

Example

They said: “Keeping track of receipts is a nightmare.” What they do: photograph every receipt and text the pictures to themselves. What people say is useful. What they do again and again is stronger evidence.

04 Make sense of it

Work out what changed, what's still unclear, and how strong the evidence really is.

What surprised you?

What supports your guess?

What weakens or contradicts it?

What's still unanswered?

HOW STRONG IS WHAT YOU HEARD?

A guess	Something you believe but haven't seen support for yet.
An opinion	What someone says they think or prefer. Useful, but not the same as what they do.
A weak signal	One real observation that might matter, but hasn't repeated.
A pattern forming	Something meaningful is starting to repeat across the right people.
Strong evidence	Repeated behavior, costs, and workarounds all point the same way.

THIS CONVERSATION WAS MOSTLY

- [ ] Just my guess
- [ ] Opinion or background
- [ ] A weak signal
- [ ] Adds to a pattern forming
- [ ] Adds to strong evidence
- [ ] Contradicts what I thought

05 Compare and decide

Look for patterns, stay honest about what's unclear, and pick the smallest sensible next step.

IS A PATTERN SHOWING UP?

- [ ] I've heard this same problem before.
- [ ] The situation is similar.
- [ ] Similar workarounds are showing up.
- [ ] Similar costs are showing up.
- [ ] I'm hearing conflicting things.
- [ ] This points to a different customer group worth looking into.

What seems to be repeating?

What's still too unclear to conclude?

MY SMALLEST USEFUL NEXT STEP

- [ ] Talk with another person who has the problem.
- [ ] Look into a workaround people keep using.
- [ ] Figure out which customer group has the problem most.
- [ ] Test a changed guess.
- [ ] Follow up on something unexpected.
- [ ] Pause, because the evidence is weak or mixed.

My next step, and why it's right for now

DO IT FOR LESS

Start free. Pay only at the wall.

Customer discovery is free. All it takes is people, questions, and a place to write things down.

- Print this worksheet, or copy the questions into a free notes app.
- Find people through your own contacts, free online groups, and introductions. Ask each person who else you should talk to.
- Talk by phone or a free video call. No paid survey or research tool needed.
- Keep all your notes in one free spreadsheet so patterns are easy to spot.

You don't need to pay anyone to find people at this stage. If your own network runs dry, ask for introductions before you pay for a research panel.

DO IT WITH AI

Let AI do the heavy lifting

Copy these into any free AI tool, like ChatGPT, Claude, or Gemini. Fill in the brackets first.

Practice the conversation

Pretend you're a [who you'll talk to] *who deals with* [the problem]*. I'll interview you using open questions. Answer like a real person would, including being vague or off-topic sometimes, so I can practice follow-up questions.*

Separate facts from opinions

I'm about to talk with [who] *about* [the problem]*. Using my notes below, help me spot what they actually said versus what I assumed, and list the questions I should ask next time:* [your notes]*.*

Find patterns across conversations

Here are my notes from [number] *conversations:* [your notes]*. List what repeated, what contradicted my guess:* [your guess]*, and how strong the evidence is overall.*

Check the answer: AI can help you practice and sort notes, but it can't stand in for a real person. Never use made-up AI answers as evidence.

A VALID RESULT

“Not yet” is a fine answer

Finishing this worksheet doesn't prove your idea, and it doesn't mean you have to move forward. Weak, mixed, or surprising evidence is still useful. Your best next step may simply be to learn more.

Write down what happened. Decide what it means later.