

# How to: Customer Discovery

by Dan Moore

## How to: Customer Discovery

# Who's Dan Moore

Launched over 200 B2B products to market

4x Founder (2 exits)

EIR with UNC Chapel Hill

GTM with Pioneer Square Labs

Currently Building

- tarka.ai: GTM Engineering AI-first agency
- **getlev.co: AI Co-founder from PSL (helps with CD!)**
- ergoly.ai: AI Workers for AI-first agencies
- allman.sh: CLI messenger for agents
- bewind.co: CLI company management for agents
- dairi.co: Executive Assitant AI-first agency
- kalphai.com: AI platform for research innovators



## How to: Customer Discovery

# Today's agenda

- Why Customer Discovery
- Getting to interviews
- Conducting Interviews
- Analyzing Interviews
- Mock Interview
- Q&A



# Why Customer Discovery

- Learn a lot, fast and cheap
- Before you build the wrong thing
- Understand customer perspective
- Validate your hypotheses and assumptions



## Types of Customer Discovery Calls

- Customer context
- **Customer problem**
- Customer value propositions
- Customer pilot offers

ONLY Customers

Everyone else is noise.  
Interviewing EXPERTS, INVESTORS,  
ADVISORS, or FRIENDS don't count.

# Getting to Interviews

- What are you trying to learn?
- Who should you talk to?
- How to schedule them for a talk?
  - Get a scheduling link ([Cal.com](https://cal.com))
- Pre-game every interview

# What are you trying to learn?

What are your current hypotheses?

Prioritize based on the biggest risk  
(often pain → desirability)

Generate an interview guide  
(remove bias, ask stories)

Interview Guide Templates:

- Problem
- Position (Deck)
- Pilot (Deck)

# **Who should you talk to?**

You have a hypothesized ICP.

Look at every role around your potential buyers and users at your ICP.

What public signals tell you they're ON or OFF target?

Who are early adopters?

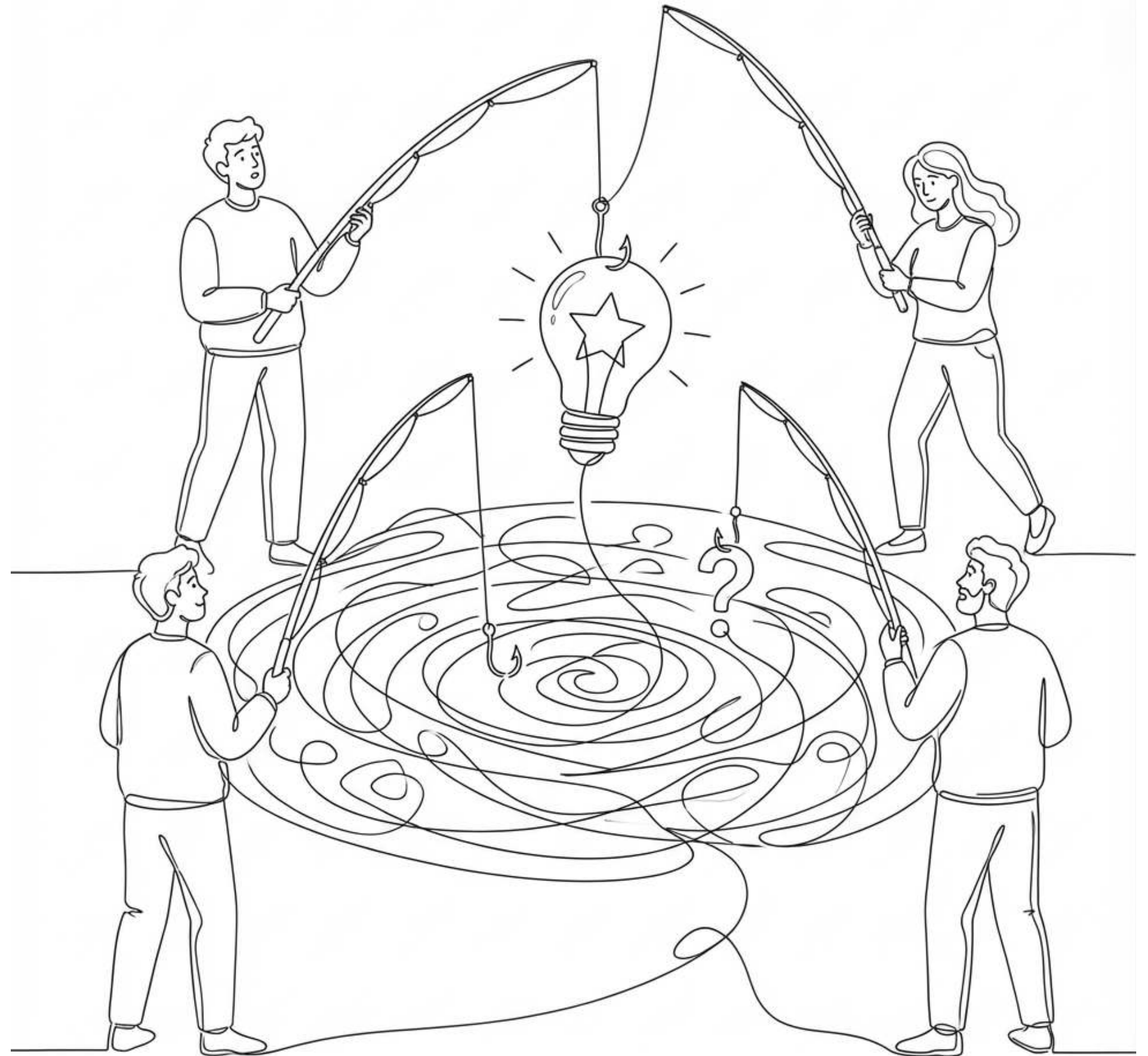
Who might be willing to talk?

## Recruiting for Interviews

# 1. LinkedIn Post

Let's see who you naturally reach—  
if you can't, you may have the wrong market.

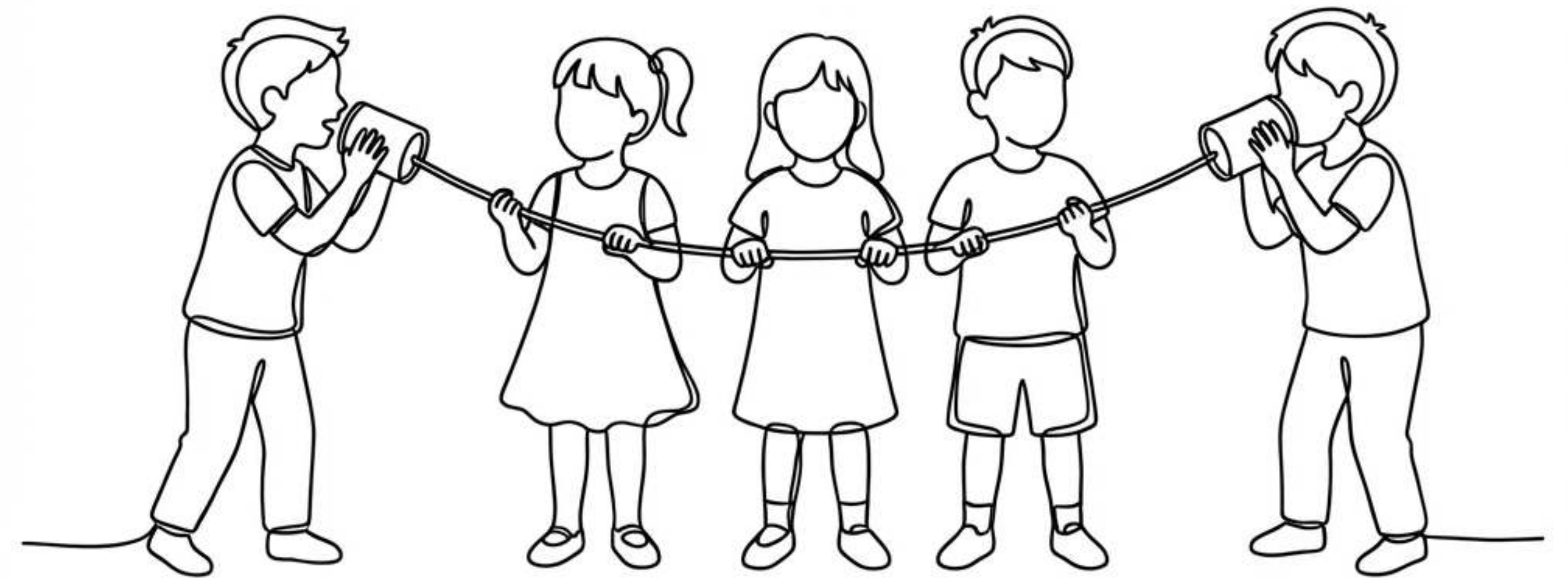
- Create a problem-oriented post
- Tag 3 people (experts, thought leaders, ideal customers in your network)
- Optional: Add incentive (Starbucks gift card or charity donation)
- Include your scheduling link



## Recruiting for Interviews

# 2. In-Network Prospects

- Export LinkedIn Connections
- Import to Happenstance AI
- Run a search based on your ICP
- Get ~25 people
- Forward your LinkedIn post in Messenger to these people with: “I’m working on this, can we chat?”



## Recruiting for Interviews

# 3. Potential Prospects

1. Pay for Sales Nav (40 connection requests / day)
2. Search LinkedIn Sales Nav / Apollo / RocketReach, etc... to generate a relevant prospect list
3. Draft basic connection request message
4. Draft follow-up message with scheduling link
5. Send connection requests

Scale with a tool like

Dripify (\$59/mo), Lemlist, or Heyreach



# Interview Pre-game

5-15 mins Before every interview

- Review guide: Understand latest flow and questions you need answered
- Review LinkedIn profile: Don't ask publicly answered questions
- Test call transcriber: Granola (invisible) or Fathom (video)

# During the Interview

- The guide is a *guide*. Follow their story  
**"And then what did you do?"**
- Don't share much to avoid bias.  
Turn their questions around on them,  
**"What would you want it to do?"**
- Ask open-ended questions,  
**"And then what did you do?"**
- Investigate what has already happened:  
**"When was the last time...?"**
- Learn in to emotions  
**"Oof, that sounds painful...? Why was that?"**
- Keep track of time.

# CURSE

## A problem worth solving

*Crucial:* Real money has been spent  
**“What did you pay for that last time?”**

*Ubiquitous:* Everyone in segment has this problem  
**(Did they have this problem?)**

*Recurring:* Happens frequently (retention)  
**“When was the last time you had this problem?”**

*Specific:* They all articulate it the same way (push)  
**(What did they call this problem?)**

*Engaging:* They're actively searching (pull)  
**“What are you doing to solve this?”**



# Analyze Interview & Learnings

You'll want to reference recordings, find quotes, and follow-up

- Airtable or Google Spreadsheet
- Granola (Recorder) Project
- NEW: Desktop Folder with Claude Code/Claude Cowork

You'll want to track learnings across many interviews

- Find a way to prioritize learnings, like CURSE score

CURSE Tracker Template

# What's next?

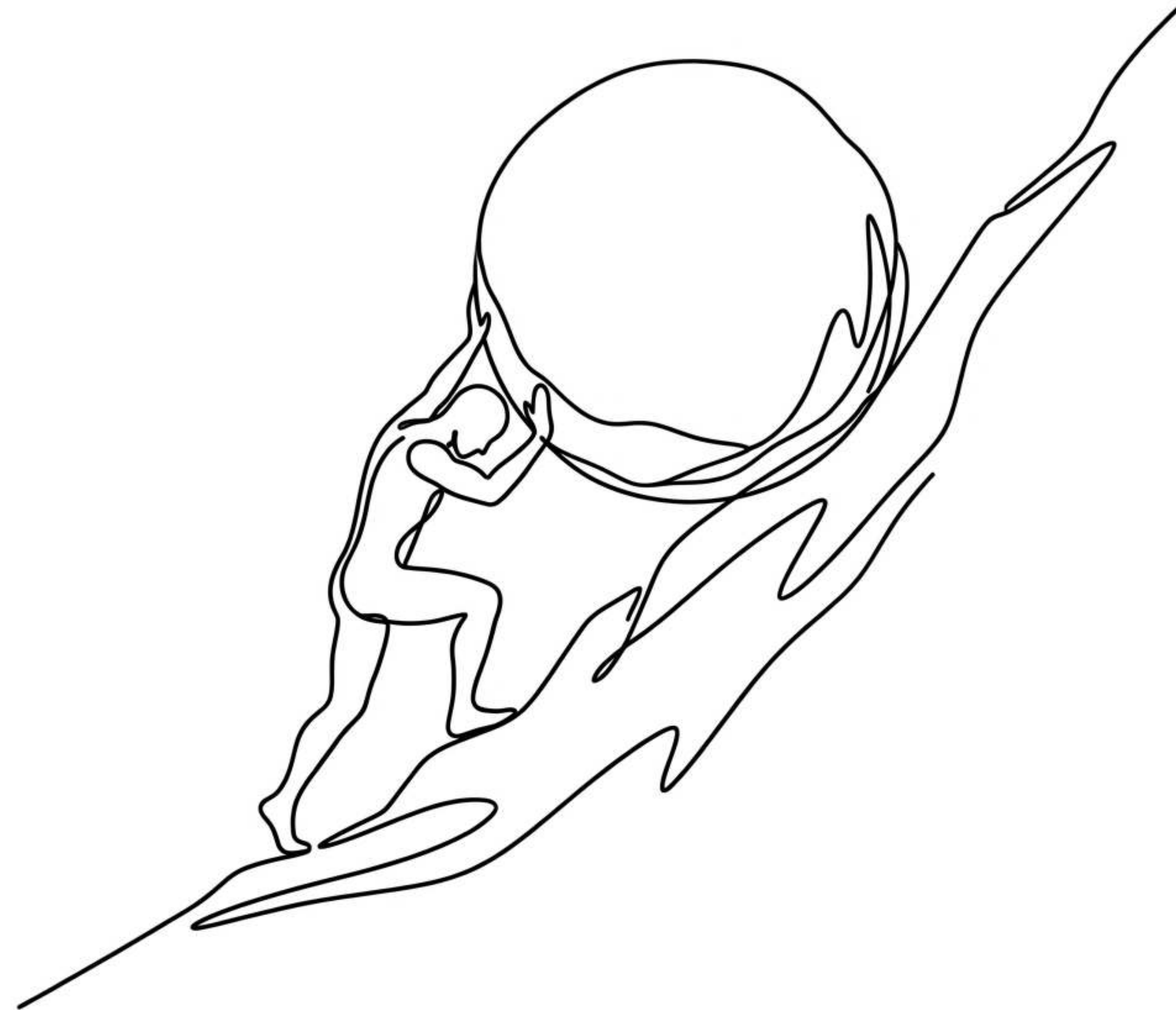
Update learning goals  
for the next interview.

**Keep going!**

Only stop when you're not learning anything new.

Found a Problem? Try to validate:

- Value Propositions
- Pilot Sales Offers
- and more!



**Practice**

# Mock Interview

Who wants to be my  
prospective customer?



Mock Guide

# Questions?

## Carve Outs

Dan Moore

[linkedin.com/in/toobulkeh/](https://www.linkedin.com/in/toobulkeh/)

How I got tarka's first 10 customers

[tarka.ai/ffs](https://tarka.ai/ffs)

Lev, Your AI Cofounder with Customer Discovery

[getlev.co](https://getlev.co)

Marketing Vignettes

[tarka.ai/vignettes](https://tarka.ai/vignettes)