APPENDIX E. EVENT LISTING MATRICES FOR NINE STARTUPS IN THE SAMPLE

Because this study is process-oriented, I generated a time-ordered event listing display that allowed for the transforming of data, condensing, sorting, and linking it over time (Gheradi & Turner, 2002). For each case, a crossing of two lists helped in understanding flow, location, and connection of events. The matrices are **event listings** – *a series of concrete events listed over a chronological time period.*

Note that the event listing matrices are too large to be stored and printed in a single sheet of letter sized paper. They have been saved as this separate supplementary content document for this dissertation.

Startup A

Customer and Customer Interaction Information - Relevant for Search (Customer Discovery and Customer Validation) process in Blank's (2012) Customer Development Model

	A(I) - INDIVIDUAL NEED RECOGNIZED	B(I) - OPPORTUNITY FILTRATION leading to... INDIVIDUAL NEED FULFILLED	C(I) - OPPORTUNITY SELECTION leading to... BUSINESS OPPORTUNITY RECOGNIZED	G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY	H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY	D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED
Demonstrated Customer Commitment (Contract/Sale)			SALE: COMMITMENT THROUGH MONEY EXCHANGE with end-customer *(Bhave, 1994; Block & MacMillan, 1985)*		SALE: COMMITMENT THROUGH MONEY EXCHANGE with end-customer *(Bhave, 1994; Block & MacMillan, 1985)*	SALE: COMMITMENT THROUGH MONEY EXCHANGE with end-customer *(Bhave, 1994; Block & MacMillan, 1985)*
Opportunity Exploitation and Resource Assembly Sub-Phase (G, H, I)		PRODUCT (G)	CUSTOMERS (I)	PRODUCT (G)	ORGANIZATION (H)	PRODUCT (G) | CUSTOMER (I)
Phase	I. OPPORTUNITY DISCOVERY PHASE (Bhave, 1994)					II. OPPORTUNITY REFINEMENT
1. Description of Stage for Startup (as in case and process diagram)	2.2.1 - Founder F experienced health issues	2.2.1 - Experimented with fermented foods	2.2.2 - Informally sold beverage to Family and Friends	2.2.3 - Developed name and bottle for the product	2.2.4 - Started production in 20'x20' space & taste testing/informal sales at a local organic grocer. Realized there was a business opportunity*	2.2.5 - Testing and selling product to Founder M's personal training clients
2. Type of Customer:	N/A - Just founders	N/A - Just founders	Family and friends - INDIVIDUAL CONSUMER	N/A	Professional network / External target market - INDIVIDUAL CONSUMER	Professional Network - INDIVIDUAL CONSUMER
3. Customer Interaction Initiated by:	N/A	N/A	Startup	N/A	Startup	Startup
4. Information Collection / Marketing and Sales Communication Channel for Customer Interaction:	N/A	N/A	Physical - In-person	N/A	Physical - In-person	Physical - In-person
5. Distribution Channel of Product:	N/A	N/A	Direct to end-customer	N/A	Direct to end-customer	Direct to end-customer
6. Description of Early Customer Interaction:	*Research and testing about (self-) customer and problem* - Started research and made lifestyle and diet changes	*Research and testing problem and product (MVP)* - Tested ways to make fermented foods that tasted good and made Founder F feel better	*Tested product* - interest in product with people in personal network	N/A	*Tested product* - with people in and near network	*Tested product with customer segment* (health-focused people)
7. Description of Information Gathered:	Learned that fermented foods could help	Found a way to make a fermented beverage that founders thought tasted good	People liked the way the product tasted	Defined look of product	Learned they could make product on slightly larger scale and there was customer interest	People liked the way the product tasted
8. Customer Feedback Impact: *Strategic (Ansoff, 1998; Child, 1972; Maidique & Zirger, 1984; 1985)* or *Operational/Tactical (Ansoff, 1988)*	N/A - Just founders - Strategic	N/A - Just founders - Strategic	Strategic - confirmatory (that this is a good product)	N/A - Just founders and marketers - Strategic	Operational/Tactical - confirmatory	Strategic - confirmatory (that this is a good product)
9. Level of Validation Received from Customer:	Self-justification	Self-justification	Personal Network: Family and Friends Validation; Commitment through money exchange validation	Self-justification / Marketing company	Personal network and External target market validation; Commitment through money exchange validation	Professional network validation; Commitment through money exchange
10. Level of Acceptance of Customer Feedback:			Extremely valued			
11. Subsequent Action by Startup:	Started experimenting with making fermented foods	Started letting friends and family try	Saw potential to sell product to more people	N/A	Continued market testing	Refine bsuiness concept based on information to-date
12. Other Non-Customer Intel Collected During NVC Stage:	Secondary research, but about health issues, not market	Secondary research, but about health issues, not market	N/A	Marketing company	N/A	N/A

	CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT		CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE (with end-customer) (Bhave, 1994; Block & MacMillan, 1985)	SALE: COMMITMENT THROUGH MONEY EXCHANGE with end-customer (Bhave, 1994; Block & MacMillan, 1985)	CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT	
PRODUCT (G)	CUSTOMER (I)	PRODUCT (G)	ORGANIZATION (H)	ORGANIZATION (H)	CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)
PHASE (Bhave, 1987; 1994)	III. TRANSITION PHASE (Bhave, 1994)	IV. ENTREPRENEURIAL PHASE				
E - BUSINESS CONCEPT DEVELOPMENT	F - COMMITTED TO PHYSICAL ORGANiZATION CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT	H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY	I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS			
2.2.5 (Continued). Decided that this would be a good opportunity to pursue*	2.2.6. - Commitment to growing the business - *business logo designed* , PhD on hold, tested retailer interest, and got contract with retailer*	2.2.7 - Moved to 22,000 square foot production facility	2.2.8 - Partnered to sell product at Retailer #1	2.2.9 - First farmers' market booth and first official sale to individual consumer	2.2.10 - Building more retail partnerships - Health food market and mainstream food and beverage markets. Founders believe that they have identified their target market and business model*	2.2.11 - Media coverage
...	Professional Network - RETAILER (Participant-defined customer)	N/A	Professional Network - RETAILER	External target market	Professional network and external target market	External target market, everyone
...	Startup	N/A	Startup	Startup/Customer	Startup/Customer	Other - Media
...	Physical - In-person, phone	N/A	Physical - In-person	Physical - In-person; Earned - related TV on problem; Web -Social Media	Physical - Earned - In-person meetings, phone; Web - Emails, website	Physical and Web - Earned media - Event, newspapers (2), radio, television, blogs
...	Direct to retailer	N/A	Direct to retailer	Direct to end-customer	N/A	N/A
...	Testing out business model - wanted to see if there would be interest from health food retailers	N/A	Tested business model and customer segment	Testing problem, product, business model, and customer segment	Tested business model and customer segment	Raised awareness (Information sent out)
Received extremely positive feedback	Personal network matters and that professional, retail network likes beverage	N/A	Learned that there is a large demand from target market (product sold out regularly)	Customers are interested	Wanted to learn whether a larger group of retail stores would be interested to sell product	?
...	Strategic - confirmatory	N/A	Strategic - Confirmatory	Strategic, operational, tactical - Confirmatory	Strategic, Operational/Tactical - confirmatory	?
Professional network validation	Professional Network Validation	N/A	Professional Network and External Target Market Validation; Commitment through money exchange	External target market validation, Commitment through money exchange	Professional network, external target market, and Commitment through contract validation	Media validation
Extremely valued						
Decided to commit business	Move to larger production facility (22,000 square feet)	N/A	Increased production	Interest to return to farmers' market and continue to seek out new customers	Received validation that pushed Startup to continue to grow and seek out more retailers and individual consumers	N/A (No actual feedback)
N/A	N/A (because startup considers retailers as customers)	N/A	N/A (because startup considers retailers as customers)	N/A	N/A	Media exposure was generally public - suggests validation from media

CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT		SALE: COMMITMENT THROUGH MONEY EXCHANGE with end-customer (Bhave, 1994; Block & MacMillan, 1985)	SALE: COMMITMENT THROUGH MONEY EXCHANGE with end-customer (Bhave, 1994; Block & MacMillan, 1985)	SALE: COMMITMENT THROUGH MONEY EXCHANGE with end-customer (Bhave, 1994; Block & MacMillan, 1985)	CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT	
CUSTOMERS (I)	ORGANIZATION (H)	CUSTOMERS (I)	ORGANIZATION (H)	CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)

J - SUBSEQUENT SALES WITH INCREASED MARKETING EFFORTS TOWARDS GOAL MARKET AND FORMALIZE BUSINESS

CUSTOMERS (I)	ORGANIZATION (H)	CUSTOMERS (I)	ORGANIZATION (H)	CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)
2.2.12 - First contract with Specialty Supermarket Chain #1; 2.2.13 - Contracts with small, independent retailers and distributors; 2.2.14 - Attempted 1st meeting with National General Supermarket Chain #1	2.2.15 - Search for new, larger production space	2.2.16 - Calls from local businesses for events and sales at events.	2.2.17 - Retail store at brewery opens and sales begin	2.2.18 - Customer appreciation event (for retailers and individual consumers)	2.2.19 - Potential Large Distributor #4; 2.2.20 - Attempted retail partnership with Specialty Supermarket Chain #2	2.2.21 - Increased Social media marketing and in-person product explanations
External target market - RETAILER; External target market - RETAILER & DISTRIBUTOR	N/A	External target market	External target market, everyone	Professional network, External target market, Everyone	External target market - Retailers and Distributors	External target market
Customer (Retailer), Startup	N/A	Customer	Startup	Startup	Startup (?)	Startup
Physical and Web - In-person, mailed package, Phone and Email	N/A	*Physical* - phone	*Physical* - In-person; *Some Web* - Social media	*Physical* - In-person event, Posters, Postcards, Hand-written notes; *Media* - Radio	*Physical* - Phone and in person; *Web* - Email	Web - social media
Direct to retailer	N/A	Direct to end-customer (at event)	Direct to end-customer	Direct to end-customer and Direct to Retailer (at event)	Direct to retailer and distributor	N/A
Confirmation of product, business model, and customer segment	N/A	Testing problem and customer segment?	Testing interest in having retail store (business model) and customer segment	Promotion and thanking customers (and testing customer segments?)	Confirmation of interest from distributors and retailers	Raised awareness with potential customers and recurring customers about retail store and business.
Retailer interest	N/A	Customer interest	Customer loyalty and repeat interest, New customer interest	Customer loyalty and repeat interest, New customer interest	Customer interest. Realized cound not meet customer needs.	Gained data about potential customers
Strategic, Operational/Tactical - Confirmatory	N/A	Operational, Tactical - Confirmatory	Strategic, Operational, Tactical - Confirmatory	Strategic, Operational, Tactical - Confirmatory	Operational - Not confirmatory	Strategic - confirmatory
Target market validation and Commitment through contract valiidation	N/A	External target market and Commitment through money exchange validation	Personal Network: Family & Friends Validation, Professional Network, External Target Market Validation; Commitment through money exchange validation	Self-Justification, Personal Network: Family & Friends Validation, Professional Network, External Target Market Validation / Media Validation, Commitment through money exchange validation	Target market validation, commitment through contract validation	Target market validation, media validation
Continued seeking out more retailers	N/A	None	Continued with store operations	Continued with operations	Realization still small - no obvious action noted	N/A
N/A	N/A	N/A	N/A	N/A	N/A	Local tourism board recognized they were an interesting business for tourism and media exposure

PRODUCT (G)	CUSTOMERS (I) CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE (with end-customer) *(Bhave, 1994; Block & MacMillan, 1985)*	ORGANIZATION (H)	CUSTOMERS (I)	CUSTOMERS (I) CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT	CUSTOMERS (I) SALE: COMMITMENT THROUGH MONEY EXCHANGE with end-customer *(Bhave, 1994; Block & MacMillan, 1985)*	CUSTOMERS (I) CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT	CUSTOMERS (I)	CUSTOMERS (I) CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT
V. EXECUTE PHASE								
G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY					**J - SUBSEQUENT SALES WITH INCREASED MARKETING EFFORTS TOWARDS GOAL MARKET AND FORMALIZE BUSINESS**			
2.2.22 - Developed alcoholic beer beverage with brewery partner	2.2.23 - Product in more mainstream locations	2.2.24 - Purchase of walk-in cooler	2.2.25 - Participated in charity event	2.2.26 - Contract with Regional General Supermarket #1	2.2.27 - Focus on existing customers	2.2.28 - Expanding to gain new customers with Regional General Supermarket #1's different locations	2.2.29 - Contacted by Nation-wide Warehouse Retailer #1; 2.2.30 - Contacted by large regional organic food distributor (Distributor #4)	2.2.31 - Received organic certification to meet needs of organic market
N/A	External target market - retailers	N/A	External target market	External target market - retailer	Professional network and external target market - retailers	Professional network and external target market - retailers	External target market	External target market
N/A	Startup	N/A	Startup	Customer - Retailer	Startup - to recurring customers	Customer	Customer	Startup
N/A	In-person	N/A	In-person	Phone, In-Person	Phone and in-person, email	In-person and phone	Social media, email, phone	Phone and in-person
N/A	Direct to retailer	N/A	Direct to end-customer	Direct to retailer	Direct to retailer	Direct to retailer	N/A	Direct to distributor
N/A	Confirmation of interest from retailers	N/A	Raised awareness	Confirmation of interest from distributors and retailers	Revitalizing relationship	Increased orders and promotion to other store locations	Confirmation of interest from major retailer and distributor	Confirmation of problem, product, business model and customer segment
N/A	Customer interest	N/A	Customer interest	Customer interest	Learned where customers had been neglected and needed attention	Customer interest	Customer interest. Realized could not meet customer needs	Customer interest
N/A	Strategic - confirmatory	N/A	Operational/Tactical - confirmatory	Strategic - confirmatory	Operational/Tactical - confirmatory	Strategic - confirmatory	Strategic - confirmatory	Strategic - confirmatory
N/A	External target market and commitment through contract and money exchange validation	N/A	External target market validation	Target market validation, commitment through contract validation	Target market validation	Target market validation and commitment through contract validation	Target market validation	Target market validation, Customer commitment through contract
N/A		N/A						
N/A	N/A	N/A	N/A	N/A	Considered outsourcing sample demonstrations to retailers. Invited retailers to visit them and reconnection was important.	N/A	Decided to conduct a health and food safety audit at the request of warehouse retailer; Reinforced that they needed a larger production facility to meet needs of larger customers.	Sought out distributor and retailer partnerships interested in organic certification
N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

			CUSTOMER (Retailer) COMMITMENT THROUGH CONTRACT	
CUSTOMERS (I)	CUSTOMERS (I)	ORGANIZATION (H)	CUSTOMERS (I)	PRODUCT (G) | ORGANIZATION (H)
2.2.32 - Newspaper article; 2.2.33 - Increased social media and blogs	2.2.34 - Attending an organic conference	2.2.35 - Received loan for new production facility	2.2.36 - Contract with 23 locations of Regional General Supermarket #2	2.2.37 - Planning to increase manufacturing in new production space - not focused on getting more customers at this time.
External target market and everyone	External target market	N/A	External target market - retailer	N/A
Media and Startup	Startup	N/A	Startup (?)	N/A
Physical - newspaper; *Web - Social media and blogs*	*Physical* - In-person	N/A	Event, phone, email	N/A
N/A	N/A	N/A	Direct to retailer	N/A
Confirmation of product and customer segment	Booth to meet potential retail customers	N/A	Confirmation of product and customer segment	N/A
Customer interest	Customer interest and where they stood, relative to competitors	N/A	Larger retail customer interest	N/A
Strategic - confirmatory	Strategic - Confirmatory	N/A	Strategic - confirmatory	N/A
Self-Justification and media validation	Target market validation	N/A	Target market validation and Commitment through Contract Validation	N/A
Sought out additional publicity	N/A	N/A	N/A	N/A
Media exposure	N/A	Funding was delayed for several months from initial application in June 2016 - Until bank funding came through in January 2017. The Startup failed to provide financial documents that showed their growth. They needed to show growth through financial reports to get the loan, but needed the loan to continue growth...	N/A	N/A

Startup B

		A(I) - INDIVIDUAL NEED RECOGNIZED	B(I) - OPPORTUNITY FILTRATION leading to... INDIVIDUAL NEED not FULFILLED	C(I) - OPPORTUNITY SELECTION leading to... BUSINESS OPPORTUNITY RECOGNIZED	D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED	E - BUSINESS CONCEPT DEVELOPMENT	H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY	G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY
	Demonstrated Customer Commitment (Contract/Sale)							
	Opportunity Exploitation and Resource Assembly Sub-Phase (G, H, I)			PRODUCT (G)	CUSTOMERS (I)	CUSTOMERS (I)	ORGANIZATION (H)	PRODUCT (G)
	Phase	I. OPPORTUNITY DISCOVERY PHASE			II. OPPORTUNITY REFINEMENT PHASE			
	New Venture Creation Stage (A to J)							
Customer and Customer Interaction Information - Relevant for Search (Customer Discovery and Customer Validation) process in Blank's (2012) Customer Development Model	1. Description of Stage for Startup (as in case and process diagram)	2.2.1 - Founders felt that there were not enough community-based cultural opportunities in town	2.2.1 - Decided that they themselves and the community would like a physical location to engage in creative activities	2.2.1 - Saw an opportunity to create a membership-based cultural makerspace*	2.2.2 - Booth at community education event - To gain community insight about interest in such a space	2.2.3 - Attended event for women in entrepreneurship - to talk about maperspace, gain validation, and promote the startup	2.2.4 - Search for permanent business location through personal network in government	2.2.5 - Started planning first pop-up event
	2. Type of Customer:	Founders	Founders	Founders	External target market	External target market	N/A	Family and friends, professional network
	3. Customer Interaction Initiated by:	With self	With self	With self	Startup	Startup	N/A	Startup
	4. Information Collection / Marketing and Sales Communication Channel for Customer Interaction:	N/A	N/A	N/A	*Physical* -In-person	*Physical* - In-person	N/A	*Physical* - In-person
	5. Distribution Channel of Product:	N/A	N/A	N/A	N/A	N/A	N/A	Direct to performer for pop-up events
	6. Description of Early Customer Interaction:	With self	*With self*	With self	Tested assumptions about problem, product, business model, customer segment	Testing assumptions about problem, product, business model, and customer segment	N/A	Tested interest of performers providing entertainment or learning experience
	7. Description of Information Gathered:	The founders' own interest justified pursing the idea	The founders' own interest pursing the idea	The founders' own interest justified pursing the idea	Learned what features of the space the customers would be interested in (e.g. want music)	Found women were excited about partaking in makerspace activities in the future	It was challenging to find a location for their permanent operations	Found a group of friends interested
	8. Customer Feedback Impact: *Strategic* (Ansoff, 1998; Child, 1972; Maidique & Zirger, 1984; 1985) or *Operational/Tactical* (Ansoff, 1988)	Strategic	Strategic - confirmatory	Strategic - confirmatory	Strategic - confirmatory	Strategic - confirmatory	Operational/Tactical - Not confirmatory	Operational/Tactical - Confirmatory
	9. Level of Validation Received from Customer:	Self-justification	Self-justification	Self-justification	External target market validation	Professional network and External target market validation	N/A	Family and friends justification
	10. Level of Acceptance of Customer Feedback:							
	11. Subsequent Action by Startup:	Brainstormed ideas	Brainstormed ideas	Set up event booths to learn more about community interest for the idea	Decided to search for potential locations to have makerspace	Decided to search for potential locations to have makerspace	Continued search	Continued development
	12. Other Non-Customer Intel Collected During NVC Stage:	Secondary research	Secondary research	N/A	N/A	N/A	Meeting with city counsellor suggested that the founder believed that they would get a property through the city, however there was a lot of back and forth on this	N/A

CUSTOMERS (I)	ORGANIZATION (H)	ORGANIZATION (H)	SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985) CUSTOMERS (I)	CUSTOMERS (I)	SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985) PRODUCT (G) | ORGANIZATION (H)	ORGANIZATION (H)
	III. TRANSITION PHASE	IV. ENTREPRENEURIAL PHASE				
I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS	*F - COMMITTED TO PHYSICAL ORGANIZATION CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT*	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY & I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*
2.2.6 - Held information booths at student entrepreneurship events to publicize permanent makerspace and pop-up events. Verbal validation of interest contributed to founders dedicating more time to this business idea*	2.2.7 - Founders finished their Masters degrees and were able to dedicate a full-time commitment to setting up the startup.*	2.2.8 - Found a pop-up event location	2.2.9 - Started ticket sales; 2.2.10 - Challenges organizing first pop-up event last minute	2.2.11 - First pop-up event and lessons learned	2.2.12 - Planned and held second pop-up event; 2.2.13 - Lessons learned from second pop-up event	2.14 - Challenges finding permanent location for Startup B and decided to close the business
Friends and family, External target market	N/A	Friends and family (Asking them what types of activities they would like to see)	Family and friends, External target market; Vendors at the event (not exactly supply side customers) - Family and friends, Professional network, Proximal individuals	Family and friends (mostly attended), External target market; Vendors at the event (not exactly supply side customers) - Family and friends, Professional network, Proximal individuals	Family and friends, Professional network, External target market	N/A
Startup	N/A	Startup	Startup	Startup	Startup	N/A
Physical - In-person, *Web* - Email	N/A	N/A	*Physical* - In-person, phone, and later, posters and social media, *Web* - website, social media	*Physical* - In-person, and later, posters and social media, *Web* - website, social media	Physical - In-person, Posters	N/A
Direct to end-customer - promotion	N/A	N/A	Direct to end-customer; Direct to performer	Direct to end-customer	Direct to end-customer	N/A
Tested assumptions on product and problem	N/A	Tested interest in product	Testing assumption that tickets would sell to attendees of event. Also tested ability to get performers	Tested interest in product, business model, and customer segment	Second attempt to test assumption that tickets would sell and performers would be easy to obtain	N/A
Learned that there were two types of customers - those who wanted to demonstrate or teach a topic, and those interested in learning a topic, but did not believe everything they had to say	N/A	The types of product/event features desired were explained	Learned no tickets were selling, especially without promotions (no flyers, posters, etc.). Also learned of challenges coordinating the scheduling of vendors for the event.	Once the event took place, founders learned that customers were not interested in a full day event as they only attended certain features. They also learned that they had not marketed in the appropriate places - the posters and social media posts did not have a good conversion rate	Learned that customers thought that event should be in nearby city, even though the founders believed that the current location was the correct city, and that the pop-up events that they were having were not achieving the goal of creating a community feeling.	From past two events, the founders felt that city residents were not actually interested in these types of events.
Operational/Tactical - Confirmatory	N/A	Operational/Tactical - Confirmatory	Strategic, Operational / Tactical - Not confirmatory - Not as many customers attended the event as anticipated - suggesting that it could be a marketing issue or that people were not interested in the event. The way in which the startup was marketing the event needed to be adapted to connect earlier and to connect with more people. The attempts being used to attract potential customers was also not working.	Operational/ Tactical - Not confirmatory --> The attempts being used to connect with potential customers were not working.	Strategic - Not confirmatory --> Different business vision between founder and customers. Different goal between what they wanted to achieve and what they were achieving.	Strategic and operational /tactical - Not confirmatory
Friends and family, External target market	Self-justification	Family and friends validation	Only in touch with family and friends - but no ticket purchases until just before or during the event. Lack of validation also in terms of ease to coordinate professional vendors.	Validation that Personal network, Family and friends, showed up and some External target market validation, however, *not enough customers showed up*	Validation that Personal network, Family and friends, showed up and some External target market validation, *however, not enough customers showed up*	N/A
N/A	N/A	Started ticket sales	Wanted to figure out a way to promote the event	Wanted to start planning second event right away	None noted	Closed business
N/A	N/A	N/A	N/A	N/A	N/A	Had challenges working with local city counsellors to find spaces

Startup C

		A(I) - INDIVIDUAL NEED RECOGNIZED	B(I) - OPPORTUNITY FILTRATION leading to... INDIVIDUAL NEED FULFILLED	C(I) - OPPORTUNITY SELECTION leading to... BUSINESS OPPORTUNITY RECOGNIZED	D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED	E - BUSINESS CONCEPT DEVELOPMENT	G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY	E - BUSINESS CONCEPT DEVELOPMENT
Demonstrated Customer Commitment (Contract/Sale)								
Opportunity Exploitation and Resource Assembly Sub-Phase (G, H, I)			PRODUCT (G) | CUSTOMERS (I)	CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G)	CUSTOMERS (I)
Phase		I. OPPORTUNITY DISCOVERY PHASE #1			II. OPPORTUNITY REFINEMENT PHASE #1			
New Venture Creation Stage (A to J)		A(I) - INDIVIDUAL NEED RECOGNIZED	B(I) - OPPORTUNITY FILTRATION leading to... INDIVIDUAL NEED FULFILLED	C(I) - OPPORTUNITY SELECTION leading to... BUSINESS OPPORTUNITY RECOGNIZED	D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED	E - BUSINESS CONCEPT DEVELOPMENT	G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY	E - BUSINESS CONCEPT DEVELOPMENT
1. Description of Stage for Startup (as in case and process diagram)		2.2.1 - Founder wanted to start a new business when real estate agents that had asked him to build websites for them were not generating new leads	2.2.2 - Idea #1 - Built a customer relationship management system for real estate agents to access leads for sales and checked with agents after, learning that they had no interest in a CRM system	2.2.3 - Idea #1 -continued - Checked with non-realtor stakeholders in real estate about interest in CRM (Mortgage agents, financial advisors, accountants)	2.2.4 - Idea #1 -continued - Knocked on home owners' doors for real estate leads in exchange for giving them free market assessment reports about neighbourhoods they might move to. Home owners did not trust them /did not need to sell home	2.2.5 - Idea #1 -continued - Testing assumptions & 2.2.6 - Seeking out non-real estate partners that had trusted clients to find real estate leads & 2.2.7 - Spoke with funeral directors and received some, but limited interest	2.2.8 - Idea #1 -continued - In touch with potential partner who creates market assessment reports	2.2.9 - Idea #1 -continued - Not enough interest from non-real estate partner - funeral directors, so founder decided to find other potential non-real estate partners that could provide leads - Divorce lawyers, retirement homes, immigration lawyers and consultants. They did not have positive responses that these parties would be interested to provide leads
2. Type of Customer:		Professional Network (Realtors)	Professional Network (Realtors)	External Target Market (non-realtor stakeholders in real estate industry)	N/A (not actual customers as they are providing referrals and getting paid for them- unless you call them a customer by paying with information)	N/A (Partner not customer - they are providing referrals and getting paid for them- unless you call them a customer by paying with information)	N/A (partner not customer)	N/A (Partner not customer - they are providing referrals and getting paid for them- unless you call them a customer by paying with information)
3. Customer Interaction Initiated by:		Customer	Startup	Startup	N/A - Startup	N/A - Startup	N/A - Startup	N/A - Startup
4. Information Collection / Marketing and Sales Communication Channel for Customer Interaction:		N/A	Phone	Physical: In-person, phone	Physical, in-person, door-to-door	Physical - Phone; Web - Social media, Linkedin	Web - email	Web - email
5. Distribution Channel of Product:		N/A	N/A	Direct to end-customer	N/A	N/A	N/A	N/A
6. Description of Early Customer Interaction:		Problem thought of by founder when doing other work for potential customer	Testing problem, customer segment, and product	Tested problem, business model, product	Tested business model	Tested business model	Tested hypothesis on problem/product	Tested hypothesis on problem/product
7. Description of Information Gathered:		That real estate agents did not have good websites	Learned real estate agents are not interested in a CRM system	Learned that they needed to talk to customers early and that these real estate industry professionals were willing to share information about their own clients for a commission. Provided validation that the referral based model could work	Lack of interest in sharing information about home buying/selling	Limited interest of funeral directors to provide leads/see benefit of providing leads for real estate CRM platform	There are already people out there creating market reports for home buyers/sellers. Why re-create them and what value would he then be able to bring to them that is unique?	People who could provide leads for real estate transactions are skeptical of the founder and his business idea
8. Customer Feedback Impact: _Strategic (Ansoff, 1998; Child, 1972; Maidique & Zirger, 1984; 1985)_ or _Operational/Tactical (Ansoff, 1988)_		Desire to start business to solve this lead issue	Strategic - not confirmatory	Strategic, Operational and tactical - Confirmatory	Strategic, Operational/Tactical - Not confirmatory	Strategic, Operational - Not confirmatory	Operational Tactical - not confirmatory	Strategic - Not confirmatory
9. Level of Validation Received from Customer:		Strategic - Confirmatory	Personal network - non-validation	Personal network and Target Market Network Validation	NON-CUSTOMER NON-VALIDATION - Getting information from target market's customers - lack of validation	NON-CUSTOMER NON-VALIDATION - Was challenging to find non-real estate industry people willing to provide leads on home sales/purchases. Not enough confirmation to show this was a good business model	N/A	NON-CUSTOMER NON-VALIDATION - Limited number of target market partners interested to speak with founder
10. Level of Acceptance of Customer Feedback:		N/A						
11. Subsequent Action by Startup:		N/A	Wanted to check with others in real estate industry to see if the CRM system would be useful to them	Wanted to see if he could get real estate leads by himself for the platform	Decided to work with non-real estate partners to find leads	Concluded more testing was required	N/A	Founder is not sure what to do with this idea now and decides to explore another business idea
12. Other Non-Customer Intel Collected During NVC Stage:		Feedback from mentors	Feedback from mentors	Feedback from mentors	Individual home owners (not exactly considered customers at this stage, as realtors were still customers. The home owners were just data providers); Feedback from mentors	Non-real estate partners (divorce lawyers, funeral home directors, etc) who would be paid a service fee for providing startup with referrals; Feedback from mentors	N/A (no response from potential partner)	Non-real estate partners (divorce lawyers, funeral home directors, etc) who would be paid a service fee for providing startup with referrals; Feedback from mentors

Customer and Customer Interaction Information - Relevant for Search (Customer Discovery and Customer Validation) process in Blank's (2012) Customer Development Model

PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	CUSTOMER COMMITMENT THROUGH CONTRACT PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	
I. OPPORTUNITY DISCOVERY PHASE #2			**II. OPPORTUNITY REFINEMENT PHASE #2**		**I. OPPORTUNITY DISCOVERY PHASE #3**		
B(E) - OPPORTUNITIES RECOGNIZED	*B(E) - OPPORTUNITIES RECOGNIZED*	*B(E) - OPPORTUNITIES RECOGNIZED*	*E - BUSINESS CONCEPT DEVELOPMENT*	*E - BUSINESS CONCEPT DEVELOPMENT*	*B(E) - OPPORTUNITIES RECOGNIZED*	*B(E) - OPPORTUNITIES RECOGNIZED*	*C(E) - OPPORTUNITIES CHOSEN*
2.2.10 - Idea #2 - Founder wanted to see whether individual home owners would be interested in web platform to learn about renovations on neighbours' homes. They would also need to share information about their own homes	2.2.11 - Social media for communication with potential customers; & 2.2.12 - Idea #3: Generating leads for contractors - letting them know who has unfinished basements that they might want to renovate (Would need information from Idea #2)	2.2.13 - Idea #4 - Created a one-stop address change website for realtors to share with clients; 2.2.21 - While founder learned that an ability to change addresses fast was desirable, getting realtors to pay for it was not successful	2.2.14 - Idea #1 -continued - Confirmed partnership with funeral home to find real estate & 2.2.15 - still trying to seek out non-real estate partners that had trusted clients to find real estate leads	2.2.16 - Idea #1 continued - Talked with realtor abour referral process	2.2.17 - Idea #5 - Decided to promote online businesses through affiliate marketing ads on customized websites. These ads would earn affiliate referral fees (real estate sales by owner, charities for obituaries, the wedding industry, and a registry to find lawyers) & 2.2.18 - Realized affiliate marketing could take a long time	2.2.19 - Idea #6: Building a website that rates realtors for home buyers and sellers	2.2.20 - Idea #5 continued - Decided to seek out fast validation for affiliate marketing websites
External target market (Home owners)	External target market (Contractors)	External target market (Realtors)	N/A (Partner not customer - they are providing referrals and getting paid for them- unless you call them a customer by paying with information)	External target market (Realtors)	External target market - Online businesses including - Individual home sellers, Charities, Wedding industry companies, Lawyers (People visiting the startup's websites are not customers, but other stakeholders)	Professional network, External target market (For the founder, realtors were the customer, not, the home buyers and sellers)	External target market - Online businesses including - Individual home sellers, Charities, Wedding industry companies, Lawyers (People visiting the startup's websites are not customers, but other stakeholders)
Startup	Startup	Startup	Startup	Startup	Startup	Startup	Startup
Web - Social media, Facebook groups	? (Likely email)	Web - email; Learned about need for address change site through DATA SCRAPING	Physical - Phone; Web - Email, Social media, Linkedin	Physical - Phone	Web - Messaging through online classifieds, Data scrapping, Email, Web forms	(Initially information through DATA SCRAPING. Then, connected: Physical, by phone, to realtors, and Web - Email and Website to realtors and home buyers/sellers - Different business concept)	Web - Messaging through online classifieds, Data scrapping, Email, Web forms
Direct to end-customer	Direct to end-customer	Direct to 'retailer' (where home owners are consumers of the address change platform, and real estate agents are the retailer)	N/A	Direct to end-customer	Direct to end-customer(Selling leads to online retailers seeking affiliate partners)	Direct to end-customer	Direct to end-customer(Selling leads to online retailers seeking affiliate partners)
Tested hypothesis on problem, product, customer segment	*Tested problem, product, and customer segment*	*Testing problem, product, and customer segment*	*Tested business model*	*Testing business model*	*Testing problem, product (Website MVP), business model, and customer segment*	Testing problem, product, customer segment and business model	*Testing problem, product (Website MVP), business model, and customer segment*
While some potential customers that were messaged on Facebook showed interest, several did not.	Learned that idea would be unfeasible, regardless of contractor interest because founder could not access the information needed to provide leads on renovation interest	Learned that realtors were not that interested but some people moving used the site	Learned that there was some, but limited interest in partners to provide leads	Learned that realtor had doubts about the business model	Homes sold by owner - no interest; Charities and obituary websites - no interest; Wedding industry - still needed to follow up.; Lawyers - found that it was already built Found this process was taking a long time.	Yes, home buyers and sellers would appreciate it; No, realtors would not pay for it	Initial websites were being built
Strategic - Not confirmatory	Strategic - Not confirmatory	Strategic - Not confirmatory	Strategic - Not confirmatory	Strategic - Not confirmatory	Strategic - Not confirmatory and No information yet	Strategic - Not confirmatory	Strategic - Not confirmatory
Target Market Non-Validation	Target Market Non-Validation	Target Market Non-Validation	NON-CUSTOMER NON-VALIDATION - Was challenging to find non-real estate industry people willing to provide leads on home sales/purchases. Not enough confirmation to show this was a good business model	Target Market Non-validation	Target market - Non-validation/still awaiting validation	Target market and non-customer non-validation	N/A
Discarded this opportunity	Discarded this opportunity	Discarded this opportunity	Went to speak with realtor (customer) About referral fee process for sales leads	Put idea on hold	Need to check still with two industries for affiliate marketing	Discarded idea of building a tool for realtors.	Decided to progress with affiliate marketing
Feedback from mentors	Feedback from mentors	Feedback from mentors	Feedback from mentors	Feedback from mentors	Feedback from mentors	Feedback from mentors	Feedback from mentors

CUSTOMER COMMITMENT THROUGH CONTRACT	SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*	CUSTOMER COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*		CUSTOMER COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*
PRODUCT (G) | CUSTOMERS (I)	CUSTOMERS (I)	ORGANIZATION (H) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | ORGANIZATION (H) | CUSTOMERS (I)
II. OPPORTUNITY REFINEMENT PHASE #3		**III. TRANSITION PHASE**	**I. OPPORTUNITY DISCOVERY PHASE #4**	**IV. ENTREPRENEURIAL PHASE**
D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED / *E - BUSINESS CONCEPT DEVELOPMENT*		*F - COMMITTED TO PHYSICAL ORGANIZATION CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT*	*B(E) - OPPORTUNITIES RECOGNIZED*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY & I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.20 (continued) - Continued testing of response to websites built for affiliate marketing	2.2.23 - Found success in earning referral fees from wedding industry online retailers	2.2.23 - Founder committed to affiliate marketing business	2.2.22 - Idea #7: Building websites that highjack other business' traffic and resell them back to original business owner as sales leads.	2.2.24 - Idea #5 continued - Started building affiliate marketing websites for different industries, such as large online retailers & 2.2.25 - Using data analytics to demonstrate success in affiliate marketing and continued to test model with existing site and building new sites.
Target market - Online businesses including - Individual home sellers, Charities, Wedding industry companies, Lawyers (People visiting the startup's websites are not customers, but other stakeholders that need to visit the website)	External Target market - Wedding industry online retailer	External Target market - Wedding industry online retailer	External Target market - Highjacked businesses	External target market - Companies with existing affiliate marketing programs
Startup	Startup/Customer	Startup/Customer	Startup	Startup/Customer
Web - Website, Data analytics	Web - Website (Online testing) and Data analytics	Web - Website (Online testing) and Data analytics, email	Web - Website and email	Web - Website, Data analytics (heat maps, reported Google searches, etc), and once interest was demonstrated, Advertisements, email
Direct to end-customer	Direct to end-customer	Direct to end-customer	Direct to end-customer	Direct to end-customer
Testing problem, product, business model, and business segment	Testing problem, product, business model, and customer segment	Testing problem, product, business model, and customer segment	Testing problem, product, customer segment and business model	Testing product, business model and customer segment
Learned affiliate marketing does seem to be getting a response - people are purchasing products of the founder's customers through the links on the founder's website	Started earning referral fees from engagement jewelry website	Started earning referral fees from engagement jewelry website	Business with no affiliate program. Had no interest to gain leads from the founder.	Data analytics in particular removed the need to communicate directly with online business customers and visitors interested in their products or services. Analytics also helped with the improvement of the website to enhance visitor experience
Strategic - Confirmatory	Strategic, Operational, Tactical - Confirmatory	Strategic, Operational, Tactical - Confirmatory	Strategic - Not confirmatory	Strategic - Confirmatory
Target market - Validation that they accepted Startup C as an affiliate partner, and Validation from Target market's customers that they are visiting the website and making purchases through the links	Target market - Validation that they accepted Startup C as an affiliate partner, and Validation from Target market's customers that they are visiting the website and making purchases through the links. Validation through money being exchanged.	Target market - Validation that they accepted Startup C as an affiliate partner, and Validation from Target market's customers that they are visiting the website and making purchases through the links. Validation through money being exchanged.	Target market non-validation	Target market validation (Website built by founder successfully offers referrals to online retailers). Validation through money being exchanged.
Decided that affiliate marketing was working for the startup	Determined that instead of creating his own business, that the founder could instead focus on affiliate marketing to make money through referral fees	Founder wanted to test one more business concept	Discarded idea of highjacking other business' traffic for leads	Continued with affiliate marketing to earn referral fees
Feedback from mentors	Feedback from mentors	Feedback from mentors	Feedback from mentors	Feedback from mentors

CUSTOMER COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*
PRODUCT (G)	ORGANIZATION (H)	CUSTOMERS (I)
V. EXECUTE PHASE
J - SUBSEQUENT SALES WITH INCREASED MARKETING EFFORTS TOWARDS GOAL MARKET AND FORMALIZE BUSINESS
2.2.26 - Idea #5 continued - Founder began standardizing process. Expanded affiliate marketing business model into different industry and built website
External target market - costume companies
Startup/Customer
Web - Website, data analytics
Direct to end-customer
Testing product, business model and customer segment
Expanding affiliate marketing model to other industries was resulting in increased earning of referral fees
Strategic - Confirmatory
Target market validation - online costume companies. Validation through money being exchanged.
Continued with affiliate marketing to earn referral fees
Feedback from mentors

Startup D

	Demonstrated Customer Commitment (Contract/Sale)					(Supply-side) CUSTOMER COMMITMENT THROUGH (Informal) CONTRACT
	Opportunity Exploitation and Resource Assembly Sub-Phase (G, H, I)			PRODUCT (G)	CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)
	Phase	I. OPPORTUNITY DISCOVERY PHASE			II. OPPORTUNITY REFINEMENT PHASE	
	New Venture Creation Stage (A to J)	A(I) - INDIVIDUAL *NEED RECOGNIZED*	B(I) - OPPORTUNITY FILTRATION *leading to... INDIVIDUAL NEED (not) FULFILLED*	C(I) - OPPORTUNITY SELECTION *leading to... BUSINESS OPPORTUNITY RECOGNIZED*	D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED / E - BUSINESS CONCEPT DEVELOPMENT	E - BUSINESS CONCEPT DEVELOPMENT

Customer and Customer Interaction Information - Relevant for Search (Customer Discovery and Customer Validation) process in Blank's (2012) Customer Development Model						
	1. Description of Stage for Startup (as in case and process diagram)	Founders could not find affordable, interesting venues for their non-profit events.	*(Not discussed in interviews, but founders likely eventually found venues through emailing/phoning people either in their network or in their external network to solve the problem for finding a location)*	While searching for opportunities that would solve their need, the founders also realized it was important to them that they also contributed to the cultural and economic goals of the mid-sized city that they lived in	Spoke with event planners and found they were interested	2.2.1 - Partnered with a large commercial property and arranged to have 44 properties available to rent out
	2. Type of Customer:	Founders	Unknown	Founders	Demand-side - Friends and Family, Professional network (Event planners)	Supply side - Professional network
	3. Customer Interaction Initiated by:	N/A	Unknown	N/A	Startup	Startup
	4. Information Collection / Marketing and Sales Communication Channel for Customer Interaction:	N/A	Unknown	N/A	Physical - In-person, phone; Web - email	Physical - Phone/In-person
	5. Distribution Channel of Product:	N/A	Unknown	N/A	Direct to (demand-side) end-customer (with manual customer to venue matching)	Direct to (supply-side) end-customer
	6. Description of Early Customer Interaction:	Problem	Unknown	N/A	*Tested hypothesis on problem*	Tested hypothesis on problem, product, business model, customer segment
	7. Description of Information Gathered:	Looked for potential short term rental spaces online	Unknown	From own research, found that these mid sized cities are still developing, and in a rapid growth phase. These are the cities that the business would thrive well in, and would benefit from having such a business available. Decided the easiest way to reach customers was through an online marketplace platform.	Learned there is a interest from the "demand side" event planner for the rental of event spaces	Learned that the founders were able to gather large amounts of properties through large supply-side customers
	8. Customer Feedback Impact: *Strategic (Ansoff, 1998; Child, 1972; Maidique & Zirger, 1984; 1985) or Operational/Tactical (Ansoff, 1988)*	Strategic - confirmatory (Founder)	Unknown	Strategic - Confirmatory (Founder)	Strategic - Confirmatory	Strategic - Confirmatory
	9. Level of Validation Received from Customer:	Self-justification	Unknown	Self-justification	Professional network validation	Professional Network, External Target Market Validation
	10. Level of Acceptance of Customer Feedback:		Unknown			
	11. Subsequent Action by Startup:	Looked into ways to solve this need	Unknown	Decided to talk to event planners to see if finding rental spaces was also an issue for them and if they liked the idea of an online platform	Decided to test out whether creating an online platform for event space rental in their home town would be of interest to supply side and demand side customers	Decided to create simple web platform to connect space owners and renters (MVP) to see if the business model worked
	12. Other Non-Customer Intel Collected During NVC Stage:	Own secondary research	Unknown	Own secondary research	N/A	N/A

SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)	SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)	CUSTOMER COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)	CUSTOMER COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)	
PRODUCT (G) | CUSTOMERS (I)	ORGANIZATION (H)	PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)
III. TRANSITION PHASE				
F - COMMITTED TO PHYSICAL ORGANIZATION CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT	*F - COMMITTED TO PHYSICAL ORGANIZATION CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.1 - Founding of Startup D under a different name and Designing/launching basic MVP web platform (the product). Founders asked for feedback through network on Facebook - both on interest in the product and platform features.	2.2.2 - Serve a cease and desist by regional real estate board & 2.2.3 - Shut down original business to reorganize startup and build more 'permanent' web platform. [Still had customers seeking out spaces and still continued with manual, off-website matching of supply-side and demand-side customers via email].	2.2.4 - Newspaper article written about Startup D that generated more interest in facilitated transactions between demand-side and supply-side customers. Continued building of webplatform. [Continued manual, off-website matching of supply-side and demand-side customers via email].	2.2.5 - Delayed second launch of the web platform. Built simple online form on their website to openly faciliate continued manual, off-website matching of supply-side and demand-side customers via email. This would allow the startup to take advantage of the publicity generated by newspaper article (2.2.4)	2.2.26 - Received suggestion from customer to automate search for supply-side customers using technology.
Family and friends/ Professional network/External target market	N/A [But in the background, still getting feedback about business from Family and friends/ Professional network/External target market that knew about business before it was shut down]	External target market (Supply-side and demand-side), everyone	External target market - Supply-side customers being onboarded	External target market - Supply-side customers
Startup	N/A [Customer]	Other (Media); Customers' responding to media article (both demand-side and supply side customers)	Customer	Customer (Supply-side)
Physical (Earned) - In-person media event, word-of-mouth, phone, Newspaper; Web - Social media messaging, website, blog	N/A. The founders were not promoting the business at this stage. [If potential, interested customers knew about them before the site went down, the customers contacted the startup via email]	Physical - Earned, newspaper article	Web - Website (if customer reached out)	Physical - In-person, personal network
Direct to end-customers (supply-side and demand-side with manual customer to venue matching)	N/A [In transactions still occurring, direct to end-consumer - matching supply-side and demand-side customers]	N/A	Direct to end-customer (Supply-side)	Direct to end-customer (Supply-side)
Tested hypothesis on problem, product, customer segment	*N/A [Continued testing business model with people that still knew about startup and were looking to rent spaces/rent out spaces.]*	*N/A [Customers contacted startup, even though not officially in operation]*	*Un-intentionally testing customer segment and learning more about business model, customer or problem*	*Learned more about potential ways to improve product*
Gathered information on website (product) features and customer interest. Individuals who saw the website thought it was an "incredible website" even though the founders thought it was quite basic, and received feedback about product features that they wished the site had. Had 33 bookings in first weeks - saw it as a big success	Learned that real estate board saw them as a threat, but also that there was substantial interest in having such a web platform from both supply-side and demand side customers. Started learning what local government cared about with regards to regulations	Newspaper article raised awareness about startup and showed 1) media was interested; and 2) generated interest from demand-side and supply-side customers that reached out to the startup	Learned there was still interest in the platform, even if there was manual matching involved. Google analytics allows founders to track city, demographics, gender and interests of people who searched for space rentals	Customer suggested that there are several databases of potential supply side customers that might be interested in renting out their office/studio spaces and that they could contact them with technology.
Strategic / Operational/Tactical - Confirmatory	Strategic - Confirmatory; Operational/Tactical - Non-confirmatory	Strategic - Confirmatory	Strategic, Operational/Tactical - Confirmatory	Operational/Tactical - Ignored customer suggestions
Self-Justification, Personal Network: Friends & Family Validation, Professional network validation, (External Target Market Validation by going live?)/ Media Validation	N/A [Personal network, professional network, external target market continued to seek out spaces even without business fully up and running - Commitment through money exchanged validation]	Self-Justification,Family and friends network, Professional network, External target market validation, media validation, Commitment through contract validation (Supply-side customers), commitment through money exchange validation (Demand-side customers)	Self-justification, Personal network, professional network, External target market validation, Commitment through contract validation (Supply-side customers), commitment through money exchange validation (Demand-side customers)	Self-justification validation
	[Valued, but not entirely focused on]			Skeptical (Unsolicited advice)
Learned there was a lot of interest from both their one supply side customer and from demand side customers and that they were willing/interested to book online	Wanted to shut down business and start again	With exposure, tried to rush re-launch of website	Continue to grow supply-side customers and website	N/A - with regard to this suggestion (likely no time to develop this technology, considering there were so many delays with the basic web platform technology development)
N/A	Influenced by real estate board	N/A [Article journalists had some influence on generating customer interest and subsequent interactions]	N/A	N/A

PRODUCT (G) | CUSTOMERS (I)	CUSTOMER COMMITMENT THROUGH CONTRACT		SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*		
PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	PRODUCT (G)	CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	CUSTOMERS (I)
IV. ENTREPRENEURIAL PHASE					
G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.7 - Testing web platform with embedded supply-side customer	2.2.8 - Slow on-boarding of supply-side customer spaces due to web platform not going live yet, but, the startup was still willing to to take on personal connections as supply-side customers. & 2.2.10 - Startup willing to take on unique factory space operated by professional contact as a supply-side customer	2.2.9 - Prioritized building the basic web platform software, despite detailed requests from supply-side customers	2.2.11 - Growing interest from demand-side customers	2.2.12 - Suggestion from supply-side customer lead startup to seek out rental insurance on the web platform	2.2.13 - Promotion to attract awareness about startup using worldwide gaming phenomenon, Pokemon Go
Friends and Family/Professional network	Personal contacts: Friends and family, Professional network	Professional network (non-profits)	External target market (Demand-side)	N/A	External target market
Startup	Customers (Supply-side)	Customer (Supply-side)	Customer (Demand-side)	N/A	Startup
Physical, in-person with interaction with Website	Physical, in-person and phone; Web - email	Physical, in-person and phone; Web - email	Physical, in-person and phone; Web - email	N/A	Web - Supplementary website
Direct to end-customer (Supply-side)	Direct to end-customer (Supply-side)	Direct to end-customer (Supply-side)	Direct to end-customer (Demand-side with manual customer to venue matching)	N/A	Direct to end-customer (Demand-side)
Testing product (web platform)	*Noticing the interest of the customer segment*	*Learned more about customer segment (supply-side) and their diversity of needs/requests*	*Learned more about customer segment (demand-side) and its diversity*	*N/A*	*Promotion of business*
This same supply-side customer had been giving the founders feedback for quite some time. This testing gave lots of feedback on the web platform, where there were bugs in the software, what he liked and did not like in terms of features in the web platform	Even without reaching out to find supply-side customers, they continued to approach the startup as interested potential customers	Even without reaching out to find supply-side customers, they continue to approach the startup as interested potential customers	Even without reaching out to find demand-side customers, they continue to approach the startup as interested potential customers	Learned which potential insurance companies might be appropriate for the sharing economy rental agreements	[Unclear whether there was anything learned or any customers gained from this experience. The website only stayed live that month]
Operational/Tactical - Listened to customer suggestions	Strategic - Confirmatory	Operational/Tactical - Ignored customer suggestions	Strategic - Confirmatory	N/A (Operational/Tactical - Confirmatory learnings from other non-customer activities)	N/A
Self-justification validation, Single customer validation	Personal network - Family and Friends Validation, Professional network validation	Self-justification validation	Personal network, Professional network, External target market validation, Commitment through money exchange validation	Self-Justification (No customer interaction)	Self-justification
Extremely valued (Solicited advice)		Skeptical (Unsolicited advice)			
Continued focus on building and planning web platform, taking into account new feedback from supply-side customer	Continued focus on building and planning web platform	Continued focus on building and planning web platform	Continued focus on building and planning web platform	N/A	N/A
N/A	N/A	N/A	N/A	Regulatory body that governs the sharing economy influenced decision to adopt rental insurance options - in addition to supply-side customer requests	N/A

		CUSTOMER COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*	CUSTOMER COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*	SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*
ORGANIZATION (H)	**CUSTOMERS (I)**	**PRODUCT (G)**	**PRODUCT (G) | CUSTOMERS (I)**	**CUSTOMERS (I)**
H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY / I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.14 - Worked with local government to develop startup and the startup's industry (sharing economy) regulations	2.2.15 - Discovered supply-side customers were advertising their space on other web platforms and decided to instead focus on attracting demand-side customers; & 2.2.16 - Reached out to demand-side customers	2.2.17 - Delay of web platform launch and ongoing development required	2.2.18 - Testing first live transaction in online with demand-side customer	2.2.19 - Public launch of web platform marketplace with a few initial bookings.
N/A (Accessed government through professional network)	Professional network and External target market (Current supply-side customers and potential and current supply-side customers)	External target market (Supply-side and demand-side customers)	Professional Network, External Target Market	Professional Network, External Target Market
N/A	Startup	Customers	Startup	Startup
N/A	Web - Paid online advertisements an Internet scraping for leads.	Physical - Word-of-mouth, newspapers. Web - Website.	Physical - In-person; Web - Online web platform marketplace	Web - Online web platform marketplace
N/A	Direct to end-customer (Supply-side and demand-side)	Direct to end-consumer (with manual customer to venue matching)	Direct via marketplace	Direct via marketplace
N/A	*Trying to attract desired demand-side customer segment (Promotion of business)*	*No reaching out to customers, but customers continue to seek out startup*	*Testing product*	*Launch of web platform marketplace.*
Got a seat at the table to discuss regulations that would govern the industry, while the industry was forming.	From online web searches, the founders discovered that current supply-side customers were advertising their space on other web platforms. This lead them to take a unique way to find leads and connect with demand-side customers	Strong customer interest	Learned what it was like to see first time users interact with the web platform	Learned that people were initially curious about spaces on the web platform that were posted by supply-side customers, but they were not willing to book right away.
N/A (Strategic - Confirmatory for government interactions)	Indirect Strategic, Operational, and Tactical Feedback - Confirmatory	Strategic - Confirmatory	Operational/Tactical - Listened to suggestions	Strategic - Confirmatory
Self-Justification Validation	Self-Justification, Professional Network, External Target Market Non-Validation (Supply-side customers)	Self-Justification, Personal Network, Professional Network, External Target Market Validation, Commitment through contract validation, Commitment through money exchange validation	Self-justification, Personal Network, Professional Network, External Target Market Validation, Commitment through contract Validation, Commitment thoruhg money exchange validation	Personal Network, Professional Network, External Target Market Validation, Commitment thoruhg money exchange validation
N/A	N/A	Continued development of web platform	Will proceed with launching web platform publically after fixes were made	N/A
Government interactions with regulatory body that governs the sharing economy and also has an interest in supporting local business and community development	N/A	N/A	N/A	N/A

Demand-side CUSTOMER COMMITMENT THROUGH CONTRACT
V. EXECUTE PHASE
J - SUBSEQUENT SALES WITH INCREASED MARKETING EFFORTS TOWARDS GOAL MARKET AND FORMALIZE BUSINESS
2.2.19 (Continued) - Continued onboarding spaces & Spoke with friend as a potential large-scale repeat demand-side customer about renting multiple spaces
Friends and Family (Professional network and external target market continued)
Customer (Demand-Side)/Startup ongoing
In-person, website
Direct via marketplace
Testing hypothesis about adaptation of new business model to have repeat customers in multiple cities; Testing and Promoting product, testing customer segment
Learned that there was the potential for such demand-side customers (However they did not consider supply-side customers)
Strategic - Exploratory
Self-Justification, Single Family and Friend Customer Validation
N/A
N/A

Startup E

Customer and Customer Interaction Information - Relevant for Search
(Customer Discovery and Customer Validation) process in Blank's (2012)
Customer Development Model

			PRODUCT (G)	PRODUCT (G)
Demonstrated Customer Commitment (Contract/Sale)				
Opportunity Exploitation and Resource Assembly Sub-Phase (G, H, I)			PRODUCT (G)	PRODUCT (G)
Phase		**I. OPPORTUNITY DISCOVERY PHASE**		
New Venture Creation Stage (A to J)	*A(I) - INDIVIDUAL NEED RECOGNIZED*	*B(I) - OPPORTUNITY FILTRATION - filtration of opportunities among a group of recognized ones; Long & McMullan, 1984) leads to... INDIVIDUAL NEED not FULFILLED*	*C(I) - OPPORTUNITY SELECTION (Bhave, 1994) leads to... BUSINESS OPPORTUNITY RECOGNIZED - When you see a need is widespread and commit to it*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*
1. Description of Stage for Startup (as in case and process diagram)	2.2.1 - Two friends were roommate that played video games together. When one was moving out, the founders realized they would no longer have someone to play games with.	2.2.1 - Founders checked and the only way to find a gaming partner outside of a local social circle was posting messages on computer desktop-based website forums. This was time consuming however and did not always yield results	2.2.1 - Founders decided to build a mobile app that could be used to find video game team players. This was a part time endeavour.	2.2.2 - Created first version of app (GL alpha) and a business plan
2. Type of Customer:	Founders	Founders	Founders (Friends and Family likely also)	Founders
3. Customer Interaction Initiated by:	N/A	N/A	N/A	N/A
4. Information Collection / Marketing and Sales Communication Channel for Customer Interaction:	N/A	N/A	N/A (Word of mouth)	N/A
5. Distribution Channel of Product:	N/A	N/A	N/A	N/A
6. Description of Early Customer Interaction:	Problem	*Problem*	N/A (Developed product - Family and friends discussions)	N/A
7. Description of Information Gathered:	N/A	N/A	N/A	N/A
8. Customer Feedback Impact: *Strategic (Ansoff, 1998; Child, 1972; Maidique & Zirger, 1984; 1985) or Operational/Tactical (Ansoff, 1988)*	N/A	N/A	N/A	N/A
9. Level of Validation Received from Customer:	Self-Justification	Self-Justification	Self-Justification (and Personal Network: Family and friends)	Self-Justification
10. Level of Acceptance of Customer Feedback:				
11. Subsequent Action by Startup:	Decided to see what options they could have to continue to play video games in teams	Decided to create a mobile phone app to find other video game players to play video games with	Aim was to quickly have first version of app built for testing	Wanted to launch app and test if there was interest
12. Other Non-Customer Intel Collected During NVC Stage:	N/A	N/A	N/A	N/A

CUSTOMER COMMITMENT THROUGH CONTRACT		CUSTOMER COMMITMENT THROUGH CONTRACT		CUSTOMER COMMITMENT THROUGH CONTRACT	FUNDING (INVESTOR, BANK, GRANTS, Etc.)
CUSTOMERS (I)	PRODUCT (G)	CUSTOMERS (I)	ORGANIZATION (H)	PRODUCT (G) | CUSTOMERS (I)	ORGANIZATION (H)
II. OPPORTUNITY REFINEMENT PHASE			III. TRANSITION PHASE		
I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS	*D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED - Rochey, 1986)*	*E - BUSINESS CONCEPT DEVELOPMENT*	*F - COMMITTED TO PHYSICAL CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*
2.2.3 - GL alpha went live and was promoted to hardcore gamers	2.2.4 - Second version of app (GL alpha 2.0) was developed and built & 2.2.5 - Startup promoted app on online gaming community forum	2.2.5 - GL alpha 2.0 was released and promoted through two online community gaming forums	2.2.6 - One co-founder quit his job and committed full-time to startup	2.2.7 - Built Kickstarter online crowdfunding campaign, public release of GL-alpha 2.5, and held crowdfunding campaign without marketing. Raised only 10% of goal funds	2.2.8 - Received angel funding and funding from local startup accelerator that could go towards product development costs
External Target Market	External Target Market	External Target Market	Founder (ongoing downloads/exposure occurring by Family and friends, external target market, media)	Founder, Friends and Family, Kickstarter visitors	Founder, Friends and Family, Professional [Entrepreneurship] Network
Startup/Customer	Startup	Startup/Customer	N/A	Startup/Customer	Startup
Web - Private messaging, startup website, blogs, online community forums and promotion, social media, mobile app	*Web* - Private messaging, startup website, blogs, online community forums and promotion, social media, mobile app	*Web* - Private messaging, startup website, blogs, online community forums and promotion, social media, mobile app	N/A	*Web* - Kickstarter website, including a video [Kickstarter campaign was on crowdfunding website but not otherwise promoted to gaming community]	*Physical* - In-person, news articles
Direct to end-user	Direct to end-user	Direct to end-user	N/A	Direct to end-user	N/A
Tested assumptions on problem, product, online gaming community model and customer segment - to see if there was interest	Tested interest in product by talking to gamers in the online forum	*Tested assumptions on problem, product, online gaming community model and customer segment - to see if there was interest*	N/A	Wanted to raise funding for next level of development, test problem, and product by asking people to give money	N/A (Tested investor interest)
300 downloads of the app gave the founders some validation that there was interest. Downloads stopped when app crashed and no longer functioned	N/A	1500 downloads	N/A	Learned that marketing was important to get funding [or that people were unwilling to pay for gaming app. Not a conclusion of founder]	Learned that there was interest in funding this business
Strategic - Confirmatory	Strategic - Confirmatory	Strategic - Confirmatory	N/A	Operational/Tactical - Not confirmatory (Founders realized that marketing was important)	Strategic - Confirmatory
Self-Justification, Personal network, External Target Market Validation, Media Validation, Commitment through Contract Validation	Self-Justification, External Target Market Validation, Media Validation	Self-Justification, External Target Market Validation, Commitment through Contract Validation	Self-Justification (and ongoing personal network, external target market, media, and commitment through contract validation)	Self-Justification, Personal Network: Family and Friends Validation	Self-Justification, Personal Network: Family and Friends Validation; Professional Network Validation; Commitment through [FUNDING] money exchange
Took downloads as positive feedback and decided to build a new version of the app	Got ready to release next version of the app	Decided to commit more time to the startup	Interest to ramp up business	Aimed to get funding other places and continue to grow	Continued focus on growth of users and improved mobile app
N/A (Media - Blog)	N/A	N/A	N/A	N/A	Investors offered substantial validation for business

	FUNDING (INVESTOR, BANK, GRANTS, Etc.)	CUSTOMER COMMITMENT THROUGH CONTRACT	FUNDING (INVESTOR, BANK, GRANTS, Etc.)	CUSTOMER COMMITMENT THROUGH CONTRACT	FUNDING (INVESTOR, BANK, GRANTS, Etc.)	CUSTOMER COMMITMENT THROUGH CONTRACT
PRODUCT (G) | CUSTOMERS (I)	ORGANIZATION (H)	PRODUCT (G) | CUSTOMERS (I)	ORGANIZATION (H)	PRODUCT (G) | CUSTOMERS (I)	ORGANIZATION (H)	PRODUCT (G) | CUSTOMERS (I)
IV. ENTREPRENEURIAL PHASE						
G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*
2.2.8 - Released closed version of app to test with small group of online gamers	2.2.9 - Won annual university pitch competition	2.2.10 - Release of GL - Public Beta 1.0 version of software	2.2.11 - Accepted into entrepreneurship program and received second angel funding investment; & 2.2.12 - Received grants and loans from various organizations	2.2.13 - Release of GL Public Beta 2.0 version of software	2.2.14 - Received local grant from business development bank	2.2.15 - Change in app format to increase user engagement
Founder, Friends and Family, Professional Network, Early Adopters in External target Market	Founder, Friends and Family, Professional [Entrepreneurship] Network	Founder, Friends and Family, Professional Network, Early Adopters in External target Market, External Target Market	Founder, Friends and Family, Professional [Entrepreneurship] Network	Founder, Friends and Family, Professional Network, Early Adopters in External target Market, External Target Market	N/A (or Professional Network)	Founder, Friends and Family, Professional Network, Early Adopters in External target Market, External Target Market
Startup	Startup	Startup/Customer	Startup (And family investor)	Startup/Customer	Startup	Startup/Customer
Web - Website, social media, online community forum, mobile phone app	*Physical* - In-person, news articles	*Web* - Website, social media, online community forum, mobile phone app	*Physical* - In-person, news articles	*Web* - Website, social media, online community forum, mobile phone app	N/A (or Professional Network)	*Web - Website, mobile phone app*
Direct to end-user	N/A	Direct to end-user	N/A	Direct to end-user	N/A	Direct to end-user
Tested the more stable beta version of their mobile phone app with just a small group of gamers found through the online community forum	N/A (Tested investor interest)	Tested interest in product and product features	N/A (Tested investor interest)	Tested interest in product and product features	N/A (Tested investor interest)	Tested customer engagement to get more users on website & product
Got feedback about this version of the app and user interest	Learned that there was interest in funding this business	Learned user interest	Learned that there was interest in funding this business	Learned user interest continued in app	Learned that there was interest in funding this business from bank	User interest
Operational/Tactical - Confirmatory	Strategic - Confirmatory	Operational/Tactical - Confirmatory	Strategic - Confirmatory	Operational/Tactical - Confirmatory	N/A	Strategic - Confirmatory
Early Adopters Target Market Validation	Self-Justification, Personal Network: Family and Friends Validation; Professional Network Validation; Commitment through received FUNDING	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation	Self-Justification, Personal Network: Family and Friends Validation; Professional Network Validation; Commitment through received FUNDING	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation	Self-Justification; Professional network; Commitment through received FUNDING	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation
Continued to develop app	Continued focus on growth of users and improved mobile app	Continued seeking of funding for growth of business	Continued focus on growth of users and improved mobile app	Continued seeking funding for growth of business	Continued focus on growth	Continued to try to gain users on app
N/A	Winning competition offered substantial validation for business	N/A	Investment offered substantial validation for business	N/A	Bank	N/A

FUNDING (INVESTOR, BANK, GRANTS, Etc.)	CUSTOMER COMMITMENT THROUGH CONTRACT		CUSTOMER COMMITMENT THROUGH CONTRACT		CUSTOMER COMMITMENT THROUGH CONTRACT
ORGANIZATION (H)	CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)	PRODUCT (G) | CUSTOMERS (I)	CUSTOMERS (I)
					V. EXECUTE PHASE
H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.16 - Angel investor from family	2.2.16 - Increased focus on attracting users using one-to-many social media posts and direct messaging through social media	2.2.17 - Attempting to use affiliate partners (Youtube gamers and Gaming Streamers) to attract users to reach an even larger user audience but only a small amount of user signup	2.2.17 - Adapted payment for affilate partner and started to bring in 5000 users	2.2.18 - Increased focus of startup to get feedback on app	2.2.19 - Organizing in-person gaming event
Founder, Friends and Family	Founder, Friends and Family, Professional Network, Early Adopters in External target Market, External Target Market	Founder, Friends and Family, Professional Network, Early Adopters in External target Market, External Target Market	Founder, Friends and Family, Professional Network, Early Adopters in External Target Market, External Target Market	Founder, Friends and Family, Professional Network, Early Adopters in External Target Market, External Target Market	Founder, Friends and Family, Professional Network, Early Adopters in External Target Market, External Target Market
Startup (And family investor)	Startup	Startup	Startup	Customers (Sending information) and Startup (Survey)	Startup
N/A	*Web* - Social media posts and direct messaging (used scripts)	*Web* - Youtube gaming videos and Twitch, Video game streaming services	*Web* - Youtube gaming videos and Twitch, Video game streaming services	Web - Emails and survey	Physical - In-person (event and meetup group); Web - Social media
N/A	Direct to end-user	Direct to end-user	Direct to end-user	Direct to end-user	Direct to end-user
N/A (Tested investor interest)	Tested ability to get new users with new way for startup to use social media	Tested assumption that this way of promoting the startup would be successful	N/A	Tested customer segment and interest in app	Raised awareness and tested interest of customer segment in product
N/A	Learned that this method worked as founder grew number of users to 7500 users	With affiliates not bringing in users, learned that partnering with the right affilate partners was important, and they still had not figured out how to incentivize the affilate partners. Learned that using this method to gain users was changing the type of users to a younger market	Realized how important incentive scheme was. Change in this brought in over 5000+ users.	Learned users were interested in engaging to give feedback	Learned in-person events were a great way to raise awareness about the app
Strategic - Confirmatory	Operational/Tactical - Confirmatory	Operational/Tactical - Not confirmatory	Operational/Tactical - Confirmatory	Strategic, Operational/Tactical - Confirmatory	Strategic - Confirmatory
Self-Justification, Personal Network: Family and Friends Validation	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation	N/A	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation
Needed to boost users to obtain funding	Continued to try to gain users on app	Adjusted affilate partnerships by adapting incentivization scheme	Increased focus on making app better	Continued to try to gain users on app	Increased improvement of the app
Angel investor offered validation	N/A	N/A	Video bloggers and gaming streamers	N/A	N/A

PRODUCT (G) | CUSTOMERS (I)	CUSTOMER COMMITMENT THROUGH CONTRACT CUSTOMERS (I)	CUSTOMER COMMITMENT THROUGH CONTRACT CUSTOMERS (I)	CUSTOMERS (I)
G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.20 - Incorporating customer feedback to improve app	2.2.21 - Users begin promoting business	2.2.22 - With only 50% of users active on the app, the startup wanted to focus on improving retention of users increasing one-to-many messaging through in-app notifications and messaging; and 2.2.23 - A drop in one-to-one messaging such as email use	2.2.24 - Increased use of data analytics tools to understand how users interact with the mobile phone app
Founder, Friends and Family, Professional Network, Early Adopters in External Target Market, External Target Market	Friends and Family, Professional Network, Early Adopters in External Target Market, External Target Market	Friends and Family, Professional Network, Early Adopters in External Target Market, External Target Market	Friends and Family, Professional Network, Early Adopters in External Target Market External Target Market
Startup	Customers (Users)	Startup	(Startup - Though users do not know that their patterns are being analyzed)
Web - Email, In-app messaging, Social media messaging	Web - In-app private messaging, In-app public posts, Social media	Web - In-app push notification (one-to-many); In-app personalized direct messaging	*Web* - Analytics through app
Direct to end-user	Direct to end-user	Direct to end-user	N/A
Learned what customers wanted	Learned customer dedication	Tested ways to retain users	Able to collect ideas about how users interacted with app and where drop off occurred
Learned what customers wanted was to be able to select customer type and learned that they could not always adapt the app, as they got more suggestions	Learned that there are VERY dedicated customers that are willing to advocate for founders	Learned that in-app notifications were a good way to remind users to engage	Learned patterns of users
Operational/Tactical - Confirmatory	Strategic - Confirmatory	Operational/Tactical - Confirmatory	Operational/Tactical - Confirmatory
Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation	Self-Justification, Personal Network: Family and Friends Validation; Early Adopters Target Market Validation; External Target Market Validation
Continued to grow business	Goal to try to retain users	Goal to continue to attract and gain users	Goal to continue to grow and retain users
N/A	N/A	N/A	N/A

Startup F

Customer and Customer Interaction Information - Relevant for Search (Customer Discovery and Customer Validation) process in Blank's (2012) Customer Development Model

Demonstrated Customer Commitment (Contract/Sale)						SUPPLY-SIDE CUSTOMER COMMITMENT THROUGH CONTRACT
Opportunity Exploitation and Resource Assembly Sub-Phase (G, H, I)		PRODUCT (G)	CUSTOMERS (I) - Intermediaries	ORGANIZATION (H)	PRODUCT (G) | CUSTOMERS (I) - Supply-side	PRODUCT (G) | CUSTOMERS (I) - Supply-side
Phase		I. OPPORTUNITY DISCOVERY PHASE		II. OPPORTUNITY REFINEMENT PHASE		
New Venture Creation Stage (A to J)	*A(I) - INDIVIDUAL NEED RECOGNIZED*	*B(I) - OPPORTUNITY FILTRATION (Long & McMullan, 1984) leads to... INDIVIDUAL NEED not FULFILLED*	*C(I) - OPPORTUNITY SELECTION (Bhave, 1994) leads to... BUSINESS OPPORTUNITY RECOGNIZED*	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY (Thompson, 1967)*	*D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED (Rochey, 1986)*	*E - BUSINESS CONCEPT DEVELOPMENT (Bhave, 1994)*
1. Description of Stage for Startup (as in case and process diagram)	1.1 - Founder was in a doctor's office and saw another patient with an emergency medical bill that he was unable to pay.	1.1 - Founder searched online for personal loans and found there was no easy way to search for loans in one place and get a quick answer to loan request from loan providers	2.2.1 - Founder spoke with local businesses (intermediaries) to see if they would be interested to offer their customers consumer finance loan options	2.2.2 - Set up office to work from	2.2.2 - Started contacting fintech loan providers (supply-side customers) on LinkedIn	2.2.2 - Followed up with fintech loan providers for more information by phone and emails
2. Type of Customer:	Founder, Stranger	Founder	External target market (Intermediaries)	N/A	External target market (Supply-side customers)	External target market (Supply-side customers)
3. Customer Interaction Initiated by:	N/A	N/A	Startup	N/A	Startup	Startup
4. Information Collection / Marketing and Sales Communication Channel for Customer Interaction:	N/A	N/A	Physical - In-person	N/A	Web - Social media	Web - emails; Physical, phone
5. Distribution Channel of Product:	N/A	N/A	Direct to marketplace via intermediary	N/A	Direct via marketplace	Direct via marketplace
6. Description of Early Customer Interaction:	*Observed problem*	*Searched for solutions to problem*	Tested assumptions on problem, product, business model, customer segment (intermediaries)	N/A	Tested assumptions on problem, business model, customer segment (supply-side customers); product	Tested assumptions on problem, business model, customer segment (supply-side customers), product
7. Description of Information Gathered:	N/A	Learned there were no online loan search engines/aggregators	Intermediaries are interested in this as a business	N/A	Learned there was interest from loan providers to be part of the loan aggregator	Learned there was interest from loan providers to be part of the loan aggregator
8. Customer Feedback Impact:	N/A	Strategic - Confirmatory	Strategic - Confirmatory	N/A	Strategic - Confirmatory	Strategic - Confirmatory
9. Level of Validation Received from Customer:	Self-Justification	Self-Justification	Self Justification; Early Adoptors Target Market (Intermediaries)	Self-Justification	Self-Justification; External (Early Adopters) Target Market Validation (Supply-side Customers)	Self-Justification; External (Early Adopters) Target Market Validation (Supply-side Customers)
10. Level of Acceptance of Customer Feedback:						
11. Subsequent Action	Went to go search options for loans	Decided that they could build an online loan aggregator platform that could streamline the process for loan seekers (Demand-side customers).	Decided to see if fintech loan providers (supply-side customers would be interested)	N/A	Decided to follow up with the loan providers to learn more about what they would be looking for as a supply-side customer.	Decided to start building web platform
12. Other Non-Customer Intel Collected During NVC Stage:	N/A	N/A	N/A	N/A	N/A	N/A

	SUPPLY-SIDE CUSTOMER COMMITMENT THROUGH CONTRACT				SUPPLY-SIDE CUSTOMER COMMITMENT THROUGH CONTRACT		SALE: DEMAND-SIDE CUSTOMER COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)
PRODUCT (G)	PRODUCT (G) | CUSTOMERS (I)	CUSTOMERS (I) Demand-Side	PRODUCT (G) | CUSTOMERS (I)	CUSTOMERS (I) Demand-Side	PRODUCT (G) | CUSTOMERS (I)	CUSTOMERS (I) Demand-Side	PRODUCT (G) | CUSTOMERS (I)
III. TRANSITION PHASE							
F - COMMITTED TO PHYSICAL CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT (Block & MacMillan, 1985; Bhave, 1994)	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*
2.2.3 - Startup web platform development began	2.2.4 - Loan provider (Supply-side customer) integration began and technical challenges encountered. Still, loan providers were slowly being onboarded to the web platform marketplace	2.2.5 - Start of online advertising with Google for startup to demand-side customers	2.2.6 - Testing of web platform prototype with family and friends (Demand-side customers)	2.2.6 - Noted unsolicited increased word-of-mouth marketing by family and friends (Demand-side customers)	2.2.7 Challenges with web platform integration with loan providers (Supply-side customers)	2.2.5 - Switched to Facebook ads and continued FB posts	2.2.8 - Startup's web platform goes live + 2.2.9 - Initial integration issues are more obvious
N/A	(Early adopters in) External target market (Supply-side)	External target market (Demand-Side)	Friends and family (Demand-side)	Friends and family (Demand-side)	External target market (Supply-side)	External target market (Demand-side)	External target market
N/A	Startup	Startup	Startup	Customers (Demand-side)	Startup	Startup	Startup (By Web platform being live); Customer (demand-side - Reaching out to web platform); Customer (Supply-side - just by being integrated into the webplatform)
N/A	Physical - Phone, In-person; Web - Email	Web - Paid - First Google Ads	In-person with web platform	In-person	Physical - Phone; Web - Email and webplatform	Web - Paid - Switched to Facebook Ads (Social media ads) and FB.	Web - Through web platform and data analytics initially; Then if email signup occurs, through email and emailed newsletters
N/A	Direct to end-demand-side customer via marketplace	Direct to end-demand-side customer via marketplace	Direct to end-demand-side customer via marketplace	Direct to end-demand-side customer via marketplace	Direct to end-demand-side customer via marketplace	Direct to end-demand-side customer via marketplace	Direct to end-demand-side customer via marketplace
N/A	Tested assumptions on product and supply-side customer segment (and how they were to work with)	Tested demand-side customer interest in marketplace and ability to reach market	Tested product and business model. Did not really test customer segment as this group were not the typical initial customers	Learned that potential customers were excited about product to promote business (Advocate customers)	Tested assumptions on product and supply-side customers' systems	Tested interest in marketplace and ability to reach market with a different ad format	Tested assumption about interest of demand-side customers and how they interacted with the platform
N/A	Learned it was not always easy to work with existing IT infrastructure of loan providers and that loan providers were not always open to adapting	Learned that this method of advertising was unsuccessful (Did not assume interest in marketplace did not exist)	Learned where web platform was incompatible with devices, hard to understand, etc (Product features)	High customer interest noted	Confirmed challenges working with existing IT infrastructures of loan providers	Found this method of advertising somewhat successful, though different customers than expected (poor credit)	Learned how many potential customers were willing to share their email address, and where visitors to the web platform left. In particular, it showed that poor loan provider integration played a large role in the delays
N/A	Operational / Tactical - Not (Somewhat) confirmatory (But the only way to proceed without rebuilding)	Operational / Tactical - Not confirmatory	Operational/Tactical - Confirmatory	Strategic - Confirmatory	Operational/Tactical - Somewhat confirmatory (But the only way to proceed without rebuilding)	Operational / Tactical - Confirmatory; Strategic (customer segment) - Not confirmatory	Operational / Tactical - Not confirmatory (both supply-side and demand-side customers)
N/A	Some validation from External Target Market (Supply-side) signing up and those that actually became integrated (though not 100% with challenges)	Lack of validation - Demand-side	Family and Friends Validation	Family and Friends Validation	Some validation from External Target Market (Supply-side) signing up and those that actually became integrated (though not 100% with challenges)	External Target Market Validation (Demand-side customers)	Lack of validation - Supply-side integration; Somewhat External target market validation - Demand-side customers still come to site (even though there is some drop off)
Started looking for ways to advertise startup online	Started looking for ways to advertise	Looked for other ways to advertise/promote business	Continued to grow and improve web platform	Continued to grow and improve web platform	Debated when to go live, given the multiple delays in integrating loan providers (supply-side customers)	Focus back on building startup	Decided to follow up on applications dropped off
N/A	N/A	Marketing agent that startup was working with	N/A	N/A	N/A	New marketing agent hired	N/A

SALE: DEMAND-SIDE CUSTOMER COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)					SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)		SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)	SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)	CUSTOMER COMMITMENT THROUGH CONTRACT
CUSTOMERS (I) Demand-Side	CUSTOMERS (I) Intermediaries	CUSTOMERS (I)	CUSTOMERS (I) Supply-side	CUSTOMERS (I) Demand-side	CUSTOMERS (I) Demand-side	CUSTOMERS (I) Demand-side	CUSTOMERS (I) Demand-side	CUSTOMERS (I) Demand-side	CUSTOMERS (I) Intermediaries
IV. ENTREPRENEURIAL PHASE									
I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.10 - Followed up on incomplete / rejected applications.	2.2.11 - Visited businesss interested in providing consumer finance	2.2.12 - Self-promotion through web platform	2.2.13 - Meeting lenders	2.2.14 - Had a focus group with family and friends to understand web platform issues	2.2.5 - Search engine optimization for loans	2.15 - Earned media attention	2.2.5 - Switched back to Google ads	2.2.16 - Expanded customer service call centre to follow up on lost customers	2.2.17 - Revisiting consumer finance (using intermediaries) in small businesses and got home renovators interested.
Rejected external target market (Demand-side)	External target market (Supply-side)	External target market	External target market (Supply-side)	Family and Friends (Demand-side)	External target market (Demand-side)	External target market	External target market (Demand-side)	Rejected external target market (Demand-Side)	External target market (Intermediaries)
Startup	Startup	Startup	Customer (Supply-side)	Startup	Startup	Magazine	Startup	Startup	Startup
Physical - Phone	Physical - Phone, In-person meeting, Conference	Web - Self-published article; Press-release	In-person	In-person with Web platform	Web - Paid - Search Engine Optimization through Google	Physical - Magazine	Web - Paid - Google Ads	Physical - Phone	Physical - Phone; Web - Web platform, email
Direct to end-demand-side customer via marketplace	Direct to end-customer via intermediary	Direct to end-demand-side customer via marketplace	N/A	Direct to end-demand-side customer via marketplace	Direct to end-demand-side customer via marketplace	N/A	Direct to end-demand-side customer via marketplace	Direct to end-demand-side customer via marketplace	Direct to end-customer via intermediary
Tested potential of customer service to overcome issues with loan provider integration	Tested if interest in intermediaries was still there	Wanted to see if they could educate visitors to the site and the general public about what loan aggregators were	Tested assumption about interest of lenders (Supply-side customers)	Tested issues on web platform (the product)	Tested interest in demand-side marketplace and ability to reach market by showing up in searches	N/A	Tested interest in demand-side marketplace and ability to reach market with a different ad format	Re-tested potential of customer service to overcome issues with loan provider integration	Tested if businesses would actually sign up as partner intermediaries
Learned that there were a lot of people not completing the application that could be followed up with.	Yes, intermediaries were still very interested in working with the startup	N/A	Meeting was successful and solidified relationship	Learned several issues as to why focus group was not completing their applications	Found search engine optimization worked as people did search for loans	Promoted product (no finding results)	Found this method of advertising somewhat successful, though still different customers than expected (poor credit)	Found that following up with "lost" customers was useful to convert them as customers	Discovered that yes, businesses would actually sign up as intermediaries
Operational/Tactical - Confirmatory	Strategic - Confirmatory	N/A (did not report impact)	Strategic - Confirmatory	Operational / Tactical - Confirmatory Feedback	Operational / Tactical - Confirmatory	N/A (No results noted)	Operational / Tactical - Confirmatory; Strategic (customer segment) - Not confirmatory	Operational/Tactical - Confirmatory	Strategic - Confirmatory
External target market validation (Demand-side)	External target market validation (Intermediaries)	N/A	External supply-side target market validation	Family and Friends Validation	External Target Market Validation (Demand-side customers)	N/A	External target market validation (Demand-side customers)	External target market validation (Demand-side)	External target market validation (Intermediaries)
Revisit intermediary businesses that could bring in more customers	Continue growing business	Continued to grow business	Continued to grow business	Continued to want to attract visitors to the website	Focus back on building startup	Focus on expanding customers	Focus back on building startup	Continued to grow business	Continued to grow business
N/A	N/A	N/A	N/A	N/A	SEO expert hired	N/A	Marketing agent suggests trying this method of advertising again	N/A	N/A

CUSTOMER COMMITMENT THROUGH CONTRACT and SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*
PRODUCT (G) | CUSTOMERS (I)
G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY
2.2.18 - Change in loan providers to meet loan seekers' needs.
External target market (Supply-side)
Startup
Web platform data analytics.
Direct to end-customer via marketplace
Tested whether loan providers met loan seekers' needs.
Learned that there were not enough loan providers for individuals with poor credit history. Adjusted lenders accordingly.
Operational/Tactical - Somewhat Confirmatory Feedback
N/A
Continued to grow business
N/A

Startup G

Demonstrated Customer Commitment (Contract/Sale)						**FUNDING (INVESTOR, BANK, GRANTS, Etc.)**	
Opportunity Exploitation and Resource Assembly Sub-Phase (G, H, I)		**PRODUCT (G)**	**CUSTOMERS (I)**	**PRODUCT (G)| CUSTOMERS (I)**	**CUSTOMERS (I)**	**ORGANIZATION (H)	CUSTOMERS (I)**	**PRODUCT (G)| CUSTOMERS (I)**
Phase		**I. OPPORTUNITY DISCOVERY PHASE**		**II. OPPORTUNITY REFINEMENT PHASE**			
New Venture Creation Stage (A to J)	*A(I) - INDIVIDUAL NEED RECOGNIZED*	*B(I) - OPPORTUNITY FILTRATION (Long & McMullan, 1984) leads to... INDIVIDUAL NEED FULFILLED*	*C(I) - OPPORTUNITY SELECTION (Bhave, 1994) leads to... BUSINESS OPPORTUNITY RECOGNIZED*	*D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED (Rochey, 1986)*	*E - BUSINESS CONCEPT DEVELOPMENT (Bhave, 1994)*	*E - BUSINESS CONCEPT DEVELOPMENT (Bhave, 1994)*	*E - BUSINESS CONCEPT DEVELOPMENT (Bhave, 1994)*
1. Description of Stage for Startup (as in case and process diagram)	2.2.1 - Idea to create a coffee brewer that could be taken on the go	2.2.1 - Designed coffee brewer and created a prototype	2.2.1 - Talked with professor and decided to patent the coffee press	2.2.2 - Started testing prototype with personal network	2.2.3 - Reached out to online community forum	2.2.4 - Tested idea at entrepreneur pitch competition and won	2.2.5 - Met with local café to test product
2. Type of Customer: (*Founder, Friends and Family, Professional Network, Early adopters in external target market, External target market, everyone, etc.*)	Founder	Founder	Founder, Professional Network	Founder, Family and Friends, Professional Network	Early adopters in external target market	Investors/ entrepreneurial network	N/A (Cafes seen as potential partners / Early adopters in external target market)
3. Customer Interaction Initiated by: (*Customer, Startup, Other*)	N/A	N/A	N/A	Startup	Startup/Customer	Startup	Startup
4. Information Collection / Marketing and Sales Communication Channel for Customer Interaction:	N/A	N/A	In-person	In-person	Web - Online community forum	Physical - In-person competition	Physical - In-person, at store
5. Distribution Channel of Product:	N/A	N/A	N/A	N/A	N/A	N/A	N/A
6. Description of Early Customer Interaction:	N/A	*N/A*	Learned about commercial potential of invention	Tested assumptions about product	*Tested hypothesis about problem (traveling and making coffee), product (without seeing it), customer segment*	*Tested problem, product, business model*	Tested product
7. Description of Information Gathered:	From professional training as an engineer - the founder was able to think about what features the product would need	Was able to design a working prototype that founder could take camping and brew coffee	Potential customer suggested that this was a good innovation that could possibly be sold	Product quality and customer interest	Learned there was interest and that the lid had to be leakproof. Learned you could build a relationship with anonymous commenters on forum	Learned that this might be a good business opportunity from the entrepreneur community	Learned that there was interest and how the product might be better described in sales to customers
8. Customer Feedback Impact: *Strategic* (Child, 1972; Maidique & Zirger, 1984; 1985) or *Operational/Tactical* (Ansoff, 1988)	Strategic - Confirmatory	Strategic - Confirmatory	Strategic - Confirmatory	Strategic - Confirmatory	Strategic - Confirmatory	Strategic - Confirmatory	Strategic, Operational/Tactical - Confirmatory
9. Level of Validation Received from Customer:	Self-Justification	Self-Justification	Self-Justification; Professional Network	Self-Justification, Family and friends validation, Professional network validation	Self-Justification; Early adopters target market validation	Entrepreneur/Investor Validation	Partner validation
10. Level of Acceptance of Customer Feedback:							
11. Subsequent Action	Decided to design prototype in the lab	Took business class	Went to get design patented	Wanted to get feedback from wider potential customer group	Decided to check to see if this opportunity was a good business opportunity	Decided to test interest of local cafes	Decided after getting validation that product was of interest from various sources to proceed with starting a business
12. Other Non-Customer Intel Collected During NVC Stage:	N/A	N/A	N/A	N/A	N/A	Entrepreneurial pitch competition	N/A

Customer and Customer Interaction Information - Relevant for Search (Customer Discovery and Customer Validation) process in Blank's (2012) Customer Development Model

PRODUCT (G)	CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)
III. TRANSITION PHASE				
***F - COMMITTED TO PHYSICAL CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT** (Block & MacMillan, 1985; Bhave, 1994)*	***I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS***	***I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS***	***I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS***	***I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS***
2.2.6 - Decided to crowdfund the manufacturing of the product	2.2.7 - Proactively contacted blog writers who wrote articles about product	2.2.8 - Used social media to self promote and landed a visit to local radio show	2.2.9 - Continued interactions with online community forum - Building community and obtaining emails	2.2.10 - Media coverage before crowdfunding campaign
External target market	External target market/Everyone	External target market/Everyone	External target market	External target market, Everyone
Startup	Startup	Startup	Startup	Media/Startup
Web - crowdfunding platform (campaign not yet active)	Web - Blogs	Traditional - Radio; Web - Social media	Web - Online community forum	Physical - Newspaper, magazine; Web - Blog
N/A (Campaign not yet active. Will be direct to end-customer)	N/A (Promotions)	N/A (Promotions)	N/A	N/A
Will be used to test product interest by willingness of customers to pay (once campaign is active)	Will test reaction of bloggers by their interest in featuring the product, and by readers by comments on the blog	Tested interested in talking about product on social media and radio	Tested interest in product, in building a community around the product, and additional feedback, and the willingness of people to share their email addresses	Tested interest in product
Learned that this could be a way to both raise funds for manufacturing and to measure interest	Learned blog writers were keen to feature the product	Learned that radio shows were interested to speak with local inventors (no confirmation on product though)	Engagement on the online forum continued to grow and translated to people sharing their email addresses that suggested potential customer interest	Learned that media themselves were providing validation in writing articles about the product - Where, if they were not interested, they would not write an article.
N/A (Campaign not yet active)	Strategic - Confirmatory	Strategic - Confirmatory	Strategic - Confirmatory	Strategic - Confirmatory
N/A (Campaign not yet active)	Media Validation	Media validation	External target market validation	Media Validation
Decided to get publicity for crowdfunding campaign	Sought out more publicity	Continued to seek out publicity and feedback from online community	Continued to seek out publicity	Got ready to launch Kickstarter campaign
N/A	Blog writers	Radio station	N/A	Newspaper, magazine, blog

SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)	SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)			SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)
PRODUCT (G) | CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)	CUSTOMERS (I)
IV. ENTREPRENEURIAL PHASE				
G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.11 - Crowdfunding campaign launched and started receiving feedback immediately about interest in product through sales, new features, and issues with shipping prices	2.2.12 - Increased promotion of crowdfunding campaign	2.2.13 - Use of data analytics to track traffic on crowdfunding website	2.2.14 - Visited local , independent cafes for feedback on product	2.2.15 - Continued promotion of crowdfunding campaign + 2.2.16 - Finished crowdfunding campaign
Family and friends, Professional network, Early adopters in external target market, External target market	Family and friends, Professional network, Early adopters in external target market, External target market	Family and friends, Professional network, Early adopters in external target market, External target market	N/A as not considered customers - Professional network	External target market, everyone
Startup (crowdfunding campaign went live); Customer (visited campaign website)	Startup	Startup	Startup	Media, Startup (and other crowdfunding campaign)
Web - Crowdfunding campaign website, Online community forum	Web - Social media posts and advertisements, Blog articles, Online community forum engagment; Community forum member engagement with other members	Web - Data analytics	In-person at café	Traditional - Radio and newspaper. Web - Cross-promotion of crowdfunding campaigns, Advertisements; Emails to customers
Direct to end-customer	Direct to end-customer	N/A	N/A as not considered customers	Direct to end-consumer
Tested interest in product	Tested different forms of media to gain attention and sales for startup	Wanted to test how popular product was in contrast to other products on crowdfunding website	Wanted to test whether cafes would promote startup	Tested interest in product using different forms of media and promotion
Learned there is interest in such a product, but interest may also be from being on crowdfunding website (by serial crowdfunders), that there was still feedback on preferences for the product	Learned social media was great for engagement, but not converting to sales. Believed that most sales came from initial commitment from people who signed up for email list, and that Community forum members were loyal and willing to defend and advocate for the startup	Noted information about where customers were located and their demographics - but only from sales info (limited information about non-purchases besides web platform habits)	Learned independent cafes had strong relationships with their customers, and that the startup could work together with cafes to reach these customers.	Learned that media was still interested in promoting startup, but that radio was not a good option for this product; that other crowdfunders were good sources of cross-promotion of products to share customers, that paid ads do not really convert to sales. Decided that they wanted to keep customers regularly updated throughout manufacturing process
Strategic - Confirmatory; Operational/Tactical - Can be adapted	Strategic - Confirmatory; Operational/Tactical - Learned some forms of promotion were more effective than others	Strategic - No real impact. Just information collected for the future (at the moment)	Operational/Tactical - Confirmatory	Operational/Tactical - Learned something done worked (Confirmatory) and some needed to be adapted and changed
Self-Justification, Personal Network: Family & Friends Validation, Professional Network, Early Adopters Target Market Validation, External Target Market Validation; Commitment through money exchange validation	Self-Justification, Personal Network: Family & Friends Validation, Professional Network, Early Adopters Target Market Validation, External Target Market Validation; Commitment through money exchange validation	Family and friends validation; External target market validation (Mostly!)	Professional Network, External target market validation	Professional network, External target market validation; Commitment through money exchange validation
Continued promotion of crowdfunding campaign	Aimed to learn more about potential customers	Wanted to get feedback in person from people	Continued promotion of crowdfunding campaign	Rounding off crowdfunding campaign
N/A	N/A	N/A	Café	Media and other crowdfunding campaigns got involved

SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*		SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*
CUSTOMERS (I)	**PRODUCT (G)**	**CUSTOMERS (I)**
I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.17 + 2.2.18 - Continued promotion of startup after crowdfunding campaign	2.2.19 - Visited manufacturer in China and received design sugggestions	2.2.20 - Continued to reap positive results from promoting startup
External target market, everyone	N/A	External target market
Startup	Startup	Startup/Customer
Traditional - Newspaper articles, poster on university campus; Web - Social media - paid advertising, automated direct messaging and regular messaging, second crowdfunding website (Indiegogo), blog	N/A	Web - Social media (Instagram)
Direct to end-customer	N/A	Direct to end-customer
Tested different forms of media to reach customers	N/A	Started testing whether Instagram pictures would be helpful in promoting startup
Continued to be successful in being promoted, and articles writted about startup had gone to a national newspaper level	N/A (Was quite satisfied with manufacturer in China and potential to collaborate on manufacturing product with them)	Saw success with Instagram strategy aimed at target market
Strategic - Confirmatory	N/A (Operational/Tactical - Confirmatory for the manufacturing)	Operational/Tactical - Confirmatory
External target market, media validation, & Commitment through money exchange validation	N/A	External target market validation &. Commitment through money exchange validation
Decided it was time to start focusing on manufacturing	Focus on manufacturing	Continued focus on manufacturing
N/A	Manufacturer	N/A

Startup H

	Demonstrated Customer Commitment (Contract/Sale)				
	Opportunity Exploitation and Resource Assembly Sub-Phase			CUSTOMERS (I)	PRODUCT (G)
	Phase	I. OPPORTUNITY DISCOVERY PHASE			II. OPPORTUNITY R
	New Venture Creation Stage (A to J)	A(I) - INDIVIDUAL NEED RECOGNIZED	B(I) - OPPORTUNITY FILTRATION (Long & McMullan, 1984) leads to... INDIVIDUAL NEED not FULFILLED	C(I) - OPPORTUNITY SELECTION (Bhave, 1994) leads to... BUSINESS OPPORTUNITY RECOGNIZED	D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED - Rochey, 1986)
Customer and Customer Interaction Information - Relevant for Search (Customer Discovery and Customer Validation) process in Blank's (2012) Customer Development Model	1. Description of Stage for Startup (as in case and process diagram)	1.1 - Founder learned that both he and his friend had mental health issues and did not know how to talk about them	1.1 - Online search yielded a few findings for online counseling, but the founder was unable to find a comprehensive web platform that provided customized mental health resources to students	2.2.2 - First meeting with University #1 Counseling Services as a potential customer	2.2.3 - Considered developing customized web pages for each different group of users
	2. Type of Customer:	Founder	Founder	Early adopters in external target market	N/A (for users)
	3. Customer Interaction Initiated by:	N/A	N/A	Startup	N/A (But initiated by startup)
	4. Information Collection / Marketing and Sales Communication Channel for Customer Interaction:	N/A	N/A	Physical/Traditional - In-person meeting	N/A
	5. Distribution Channel of Product:	N/A	N/A	Direct to end-customer (who makes it available to users)	N/A
	6. Description of Early Customer Interaction:	N/A	N/A	Tested assumption on problem and customer	N/A
	7. Description of Information Gathered:	N/A	N/A	Learned about customer (University counseling services) interest, as well as concerns over needing more staff and confidentiality issues	N/A
	8. Customer Feedback Impact: Strategic (Ansoff, 1998; Child, 1972; Maidique & Zirger, 1984; 1985) or Operational/Tactical (Ansoff, 1988)	N/A	N/A	Strategic - Confirmatory; Operational / Tactical - Some adjustments are needed	N/A
	9. Level of Validation Received from Customer:	Self-Justification	Self-Justification	Self-Justification; Early adopter target market validation	Self-justification
	10. Level of Acceptance of Customer Feedback:				
	11. Subsequent Action	Decided that there needed to be a way for individuals to access customized online self-help resources	Decided to check with university counseling services to see if they would be interested in purchasing such software	Decided to check to see if web platform would attract users (students on campus)	Decided to check to see if users would use the web platform
	12. Other Non-Customer Intel Collected During NVC Stage:	N/A	N/A	N/A	N/A

(USER REPRESENTATIVE)	PRODUCT (G)	(USER REPRESENTATIVE)	(USER)	CUSTOMERS (I)
EFINEMENT PHASE	**III. TRANSITION PHASE**			
E - BUSINESS CONCEPT DEVELOPMENT	*F - COMMITTED TO PHYSICAL CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT* (Block & MacMillan, 1985; Bhave, 1994)	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.3 - Check with mentors, psychologists, and informal counsellors on campus to see if web platform would attract student users	2.2.4 - Founder started building web platform himself	2.2.5 - Prototype is live and online and returning to get feedback from mentors as representative of users	2.2.6 - Unable to access student feedback	2.2.7 - Second meeting with University #1 Counseling Services
N/A (Not customers and not users but university staff familiar with user needs)	Founder	N/A (Not customers and not users but familiar with user needs)	N/A (student users - So, 'customers' of the customer, the university)	Early adopters in external target market (University)
N/A (But initiated by startup)	N/A	N/A (But initiated by startup)	N/A (But initiated by startup)	Startup
N/A (But In-person)	N/A	N/A (But In-person)	N/A (But physical: In-person)	Physical/Traditional - In-person meeting
N/A	N/A	N/A (Direct to user representative)	N/A (Direct to user)	Direct to end-customer (who makes it available to users)
N/A (Tested assumptions about problem and student user)	N/A	N/A (Testing to see if interacting with product would be a positive experience)	N/A (Testing assumptions that student users would be willing and interested in using a web platform on mental health)	Tested interest in product (Web platform)
Got feedback that student groups needed customized portals	N/A	N/A (Received positive reinforcement for acceptance of product)	N/A (Unable to speak with any users)	Received positive feedback but still no confirmation. Told by customer to go collect additional information from online counsellors
N/A (Strategic - Not confirmatory; startup wanted to create single web platform	N/A	Strategic - Confirmatory	N/A (Strategic - Not confirmatory)	Strategic - Confirmatory
Self-Justification (validation from user's mentors)	Self-justification	Self-Justification (Validation from user's mentors)	N/A (No validation)	Early Adopters Target Market Validation
Skeptical of feedback and went a different direction	N/A			
Decided to build web platform	N/A	Decided to move forward planning a pilot test version of the web platform	Decided to re-connect with customers (Counselling services)	Made appointments to speak with non-university online counseling organizations
Spoke with university staff who regularly interact with student users	N/A	Spoke with university staff who regularly interact with student users	Tried to connect with users themselves but were unable to	N/A

| PRODUCT (G) | CUSTOMER COMMITMENT THROUGH Verbal CONTRACT | | PRODUCT (G) | PRODUCT (G) \| ORGANIZATION (H) |
	CUSTOMERS (I)	CUSTOMERS (I)		
G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY	**I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS**	**I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS**	**G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY**	**G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY**
2.2.8 - Spoke with non-university online counselling organizations to gain more info about whether online e-counseling was important to include in the web platform	2.2.9 - Third meeting with University #1 Counselling Services	2.2.10 - First meeting with University #2 Counselling Services	2.2.11 - Meeting non-university e-counselor community for more information about industry	2.2.12 - Meeting with potential psychologist to see if they might partner
N/A (Competitors/Other players in a similar market)	Early adopters in external target market (University)	External target market	N/A (Competitors/Other players in a similar market)	N/A (Not a customer, but the meeting was to try to define whether the psychologist would be part of the startup or an external partner providing services)
Startup	Startup	Startup	Startup	Startup
N/A (Traditional - Phone; Web - Email)	Physical/Traditional - In-person meeting	Physical/Traditional - In-person meeting; Web - Email	Web - Email	Physical - In-person
N/A	Direct to end-customer (who makes it available to users)	Direct to end-customer (who makes it available to users)	N/A (Competitors/Other players in a similar market)	N/A
N/A (Seeking out information about online counselling and its market)	Testing to see if it is possible to get more commitment from customer and more staff to support online chat function	Testing to see if other university would be interested in product	N/A (Seeking out information about online counselling and its market)	N/A
N/A (Learned that there are already several online counsellors, so additional services were not needed, but that perhaps they could partner with them)	Received verbal confirmation to build pilot version of the platform for the university. No payment and this would be a trial. Received pushback from peer support group that would not support online chat function	University was interested but non-committal (took their time in responding)	N/A (Learned that e-counseling services are still very new and they are still figuring out their processes)	N/A (Was not sure what the role of the psychologist would be, even after the meeting)
N/A (Strategic - Feedback means changes may be needed to not have online counselling)	Strategic - Confirmatory	Strategic - Confirmatory	N/A	N/A
N/A (no real validation from this other than e-counselling is happening already and there are partnership opportunities)	Early adopters in external target market validation	External target market validation	N/A (No real validation other than this is a new industry)	N/A (Not a customer and only validation that there was interest from psychologists as partners)
Continued discussions with customer - University #1 Counselling Services	Would continue to follow up with peer support group to see if they would change their mind, but would also continue to build web platform	Continued to reach out to other universities to see if there was interest	N/A	Continued to reach out to customers (universities)
Non-university e-counsellors	Peer support group for chat function was not interested in working with them	N/A	Non-university e-counsellors	Psychologist

CUSTOMERS (I) | PRODUCT (G)	CUSTOMERS (I)	CUSTOMERS (I) | PRODUCT (G)	PRODUCT (G)
IV. ENTREPRENEURIAL PHASE			
I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*
2.2.13 - Followup meeting with head of Peer support group + 2.2.14 - Fourth meeting with University #1 Counselling Services	2.2.15 - Cold emails to other universities (potential customers) + 2.2.17 - First meeting with University #3 + 2.2.19 Halted sales to other universities	2.2.16 - Fifth meeting with University #1 Counselling Services	2.2.18 - Partnered with health researchers at University #1 to test web platform during pilot
Early adopters external target market (University)	External target market (University)	Early adopters external target market (University)	N/A
Startup	Startup	Startup	N/A (Startup)
Physical - In-person	Web - Emails	Physical - In-person	N/A (Inperson)
Direct to end-user via end-customer	Direct to end-user via end-customer	Direct to end-user via end-customer	N/A
Seeking out feedback for what the university was looking for in the product	Seeing if there was interest from universities	Wanted to get more precise feedback on what the university was looking for in a product	N/A (To test product effectiveness)
N/A (Still no interest from peer support group and first meeting in which details on product were beginning to be discussed)	Found that other universities found the concept of the product interesting, but wanted to see how pilot with University #1 went before committing. Another university had poor experiences purchasing such software in the past so declined purchase	Learned that university would be interested in having a chat bot program that simulated a human	N/A
Strategic, Operational/Tactical - Confirmatory	Strategic - Feedback, but not confirmatory	Strategic - Feedback (Confirmatory)	N/A
External target market validation	N/A	Early adopters external target market validation	N/A
Continued to build web platform and contact other universitites	Focused on web platform development for University #1	Continued development for University #1	Continued development for University #1
N/A	N/A	N/A	Health researchers interested to do research on the success of the product

CUSTOMERS (I)	CUSTOMERS (I)	(USERS) | PRODUCT (G)	CUSTOMERS (I)
I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.20 - Use of data analytics to track visitors to website	2.2.21 - Change to advertising-based business model	2.2.22 - Promoted web platform to student users during orientation at University #1 + 2.2.23 - Developed chat bot software for university web platform and attempted to increase user adoption	2.2.24 - Change in customer to insurance companies
External target market (Universities), users	External target market (Psychologists advertising)	N/A (Users - "Customers" of external target market)	External target market (Insurance company)
N/A	Startup	Startup	Startup
Web - Web platform Data analytics	Physical - Phone; Web - Email	N/A (Physical - Business cards, posters, fliers to users)	Physical - Phone; Web - Email
Direct to end-user via end-customer	Direct to customer sales (and then free to users)	Direct to customer sales (and then free to users)	Direct to customer sales (and then free to users)
Wanted to see how much traffic the website had	Wanted to see if business model could change allow revenue to be made from psychologists advertising on web platform	Wanted to see if he could increase user adoption with having web platform and demo of chat bot on website	Tested interest in product and business model from insurance companies
Did not see much traffic, but was not promoting the website	N/A (no feedback reported at the time)	N/A (no knowledge of improved user engagement with web platform)	Spoke with two insurance companies and found 1) not interested in current version of chat bot; 2) one not convinced of chat bot
N/A (did not really change process right now)	N/A	N/A (no feedback from customer)	Strategic - Not confirmatory
N/A (no real validation right now)	N/A (no real validation right now)	N/A (no real validation right now)	N/A (No validation from insurance companies at this time)
Continued to develop software for University #1	Continued developing chat bot	N/A	Slowed focus on business (but did not shut down) and prepared to take another job (a contract teaching role)
N/A	N/A	N/A	N/A

Startup I

Customer and Customer Interaction Information - Relevant for Search (Customer Discovery and Customer Validation) process in Blank's (2012) Customer Development Model

	Demonstrated Customer Commitment (Contract/Sale)		SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)	SALE: COMMITMENT THROUGH MONEY EXCHANGE (Bhave, 1994; Block & MacMillan, 1985)	
Opportunity Exploitation and Resource Assembly Sub-Phase (G, H, I)	PRODUCT (G)		CUSTOMERS (I)	CUSTOMERS (I)	ORGANIZATION (H)
Phase	I. OPPORTUNITY DISCOVERY PHASE				II. OPPORTUNITY RE
New Venture Creation Stage (A to J)	A(I) - INDIVIDUAL NEED RECOGNIZED		B(I) - OPPORTUNITY FILTRATION (Long & McMullan, 1984) leads to... INDIVIDUAL NEED FULFILLED	C(I) - OPPORTUNITY SELECTION (Bhave, 1994) leads to... BUSINESS OPPORTUNITY RECOGNIZED	D - OPPORTUNITY REFINEMENT - Adapt and elaborate idea until BUSINESS CONCEPT IDENTIFIED - Rochey, 1986)
1. Description of Stage for Startup (as in case and process diagram)	1.2 - After a bout of drug use and depression as a pro-sports player, Founder T sought out help with family and friends. Once back on his feet, he needed to find out what to do. He went back to school and showed a talent for web design (Ability to do web design is an investment in creating the product/service).		1.2 - Founder T was offered the opportunity by a personal connection to build the university wrestling team's website.	1.2 - After a few more customers, Founder T realizes he could start a business, even part time, making websites.	1.2 - Founder T applies to local city small business centre's summer company program and meets co-founder A with specialty in graphic design and animation. They decided with their combined skills, they could create a full suite marketing service company
2. Type of Customer:	Founder		Family and friends network	Founder, Family and friends	Founders
3. Customer Interaction Initiated by:	N/A		Friend	Unknown	N/A
4. Information Collection / Marketing and Sales Communication Channel for Customer Interaction:	N/A		Physical - In-person (?)	Unknown	N/A
5. Distribution Channel of Product:	N/A		Direct to end-customer	N/A	N/A
6. Description of Early Customer Interaction:	N/A		Tested interest in product	Tested whether clients liked the websites the founder was building (problem and customer segment)	Got to know other founder (Developed/tested product and developed model)
7. Description of Information Gathered:	N/A		Found customer was satisfied	Found that founder was able to successfully create websites to client satisfaction	Realized they would work well together
8. Customer Feedback Impact: _Strategic_ (Ansoff, 1998; Child, 1972; Maidique & Zirger, 1984; 1985) or _Operational/Tactical_ (Ansoff, 1988)	N/A		Strategic - Confirmatory	Strategic - Confirmatory	Strategic - Confirmatory
9. Level of Validation Received from Customer:	Self-validation		Self-Justification, Family & Friends Validation	Self-Justification, Family & Friends Validation	Self-Justification
10. Level of Acceptance of Customer Feedback:					
11. Subsequent Action	N/A		Continues doing web design for people, casually	Decides to signup for being part of a small business centre	Continue on with business
12. Other Non-Customer Intel Collected During NVC Stage:	N/A		N/A	N/A	N/A

SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*	SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*	SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*		
ORGANIZATION (H)	**ORGANIZATION (H) | CUSTOMERS (I)**	**CUSTOMERS (I)**	**ORGANIZATION (H)**	**CUSTOMERS (I) |ORGANIZATION (H) | PRODUCT (G)**
FINEMENT PHASE	III. TRANSITION PHASE			
E - BUSINESS CONCEPT DEVELOPMENT	*F - COMMITTED TO PHYSICAL CREATION, INCLUDING ORGANIZING PRODUCTION TECHNOLOGY TO TRANSFORM BUSINESS CONCEPT INTO MARKETABLE PRODUCT (Block & MacMillan, 1985; Bhave, 1994)*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*
2.2.1 - Testing out the partnership part-time while finishing up school and other work obligations	2.2.2 - Lauched only ad campaign and 2.2.3 - Full-time commitment to startup	2.2.4 - Relied heavily on personal network for clients + 2.2.5 - Wanted to change target customer and business model	2.2.6 - Interest to improve company website	2.2.7 - Started on projects before contract commitment. Proposals were often declined (Organizational process)
Family and Friends, Professional Network	Family and friends, Professional network, External target market	Friends and family, Professional network	N/A	Friends and family, professional network
N/A	Customer	Customers	N/A	Customer
In-person, email	Physical - In-person meetings, phone calls; Web - Email; Ads	Physical - Phone; Web - Email	N/A	Physical - Phone, Paper project proposal. Web - Email.
N/A	Direct to end-customer	Direct to end-customer	N/A	Direct to end-customer
Got to know other founder and had a few clients while working part time (Tested customer segment)	Tested business model if product would create a profitable business. Promoted product	Observed how the startup got clients	N/A	Tested business model and customer commitment to working with them
Confirmed they worked well together	Kept getting clients	Clients were readily approaching the startup. The founders seemed okay with this approach to getting customers, but they did not like the customers they were getting. Despite saying that they wanted to change the target customer, they did not seek them out directly	Talked about improving website but did not at the time.	Found that this method did not work because there were often potential clients that turned down the founders' proposals
Strategic - Confirmatory	Strategic - Confirmatory	Operational/Tactical - Not confirmatory	N/A	Operational / Tactical - Not confirmatory
Self-Justification	Self-Justification, Personal Network: Family and Friends Validation, Professional Network	N/A	N/A	None
Decided to go full time on the startup	Continued business as is	Decided to improve startup's website	N/A	N/A
N/A	N/A	N/A	N/A	N/A

SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*			SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*	
CUSTOMERS (I)	**ORGANIZATION (H)**	**CUSTOMERS (I)**	**CUSTOMERS (I)**	**ORGANIZATION (H)**
IV. ENTREPRENEURIAL PHASE				
I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*
2.2.8 - Startup relied on personal networks and referrals for clients and reached out at networking events + 2.2.9 - Started emailing proposals to potential clients	2.2.10 - Lack of funds to improve startup's own website	2.2.11 - Preference for email and minimal interest in social media	2.2.12 - Still had clients and started to decline non-ideal clients + 2.2.13 - Started to question being in this industry	2.2.14 - Designed new company website for startup
Friends and family, professional network	Founders	N/A	Friends and family, professional network	N/A
Customers / Startup (At networking event)	N/A	N/A	Customers	N/A
Physical - phone, in-person networking event; Web - Email	N/A	Web - Email	Physical - Phone; Web - Email	N/A
Direct to end-customer	N/A	Direct to end-customer	Direct to end-customer	N/A
Tested a different way of connecting with new clients and sharing proposals	N/A	N/A	Tested assumptions business model and way to access these types of customers	N/A
Learned that reaching out to customers and making processes easier for themselves was beneficial to the business as well	Delayed designing and building website that the founders felt would bring them the customers that they were hoping to attract	N/A	Founders learned that they needed to start turning away customers that they did not want to work with but that they were unwilling to seek out new customers	Realized that they needed to have a nice website to be taken seriously
Operational/Tactical - Confirmatory	N/A	N/A	Operational / Tactical - Changed plan	N/A
Self-Justification; Family and friends, Professional Network, External target market validation	N/A	Self-Justification	None	Self-Justification
N/A	N/A	N/A (Founder is fine with this approach)	Decided needed to change business website (and eventually business model)	Wanted to change other aspects of the business
N/A	N/A	N/A	N/A	N/A

SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*	SALE: COMMITMENT THROUGH MONEY EXCHANGE *(Bhave, 1994; Block & MacMillan, 1985)*				
CUSTOMERS (I) | ORGANIZATION (H)	CUSTOMERS (I)	PRODUCT (G) | ORGANIZATION (H)	PRODUCT (G)	CUSTOMERS (I)	PRODUCT (G)
I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*H - ORGANIZATION CREATION & RELATED RESOURCE ASSEMBLY*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*	*I - RESOURCE ASSEMBLY TO DEVELOP CUSTOMERS*	*G - PRODUCTION TECHNOLOGY DEVELOPMENT & RELATED RESOURCE ASSEMBLY*
2.2.15 - Started waiting for signed contract from client before starting project (organizational process) and still had clients	2.2.16 - No change in client type (relied on referrals) + 2.2.17 - Started to proactively seek out new clients. Continued to take on clients of the same type as before.	2.2.18 - Started to build processes and technology to minimize client back and forth communication	2.2.19 - Started offering in-bound marketing by creating media content online, both for the startup and for clients and increased social media content posts. Continued working with similar clients as before.	2.2.20 - Started tracking visitors to website and emails.	2.2.21 - New website with simplified, click-and-pay for services business model. Also, continued working with similar clients as before.
Friends and family, professional network	Friends and family, professional network, External target market	N/A	Friends and family, professional network, External target market	Friends and family, professional network, External target market	Friends and family, professional network, External target market
Customer	Customer --> Startup	N/A	Startup	Startup	Startup
Web - Email	Physical - In-person, phone. Web - Email	N/A	Web - Web content (Articles and videos) on website and Social media	Web - Data analytics and email	Web - Website, Web content (Articles and videos) on website and Social media
Direct to end-customer	Direct to end-customer	Direct to end-customer via website	Direct to end-customer via website and social media	Direct to end-customer via website and social media	Direct to end-customer via website and social media
Tested whether new business process of waiting for clients to commit would allow them to still complete projects	Tested whether proactively seeking out new clients would allow startup to change client base	Tested whether it was possible to build a website that minimized client interaction before commitment to a contract	Testing whether more online presence would attract people to the website and convert them to customers	Testing where and how customers interact with website and where they are located	Testing whether an e-shop with clear service descriptions and prices would simplify the process before a client commits
Founders found that this new approach made them and their clients more satisfied	Not confirmed	Not confirmed	Not confirmed	Not confirmed	Not confirmed
Operational / Tactical - Confirmatory	Operational/Tactical - Not confirmed	Strategic - Not confirmed	Strategic - not confirmed	Strategic - not confirmed	Strategic - Not confirmed
Self-Justification; Family and Friends, and Professional Network Validation	N/A	N/A	N/A	N/A	N/A
N/A	Started building technology to change business model	N/A	Decided there was a need to track website visitors	Continued development of new website	Continued on with business and working with existing clients
N/A	N/A	N/A	N/A	N/A	N/A