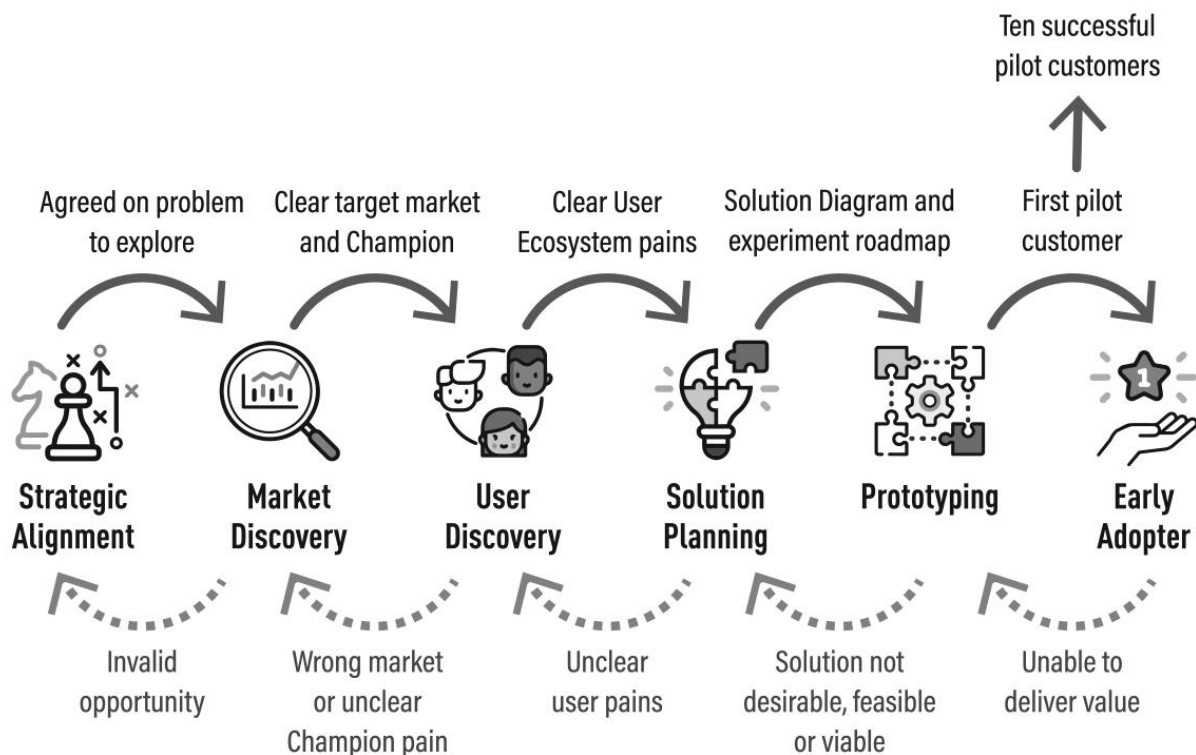


# The B2B Innovator's Workbook

Welcome to the hands-on companion for my book, [The B2B Innovator's Map](#)! This workbook summarizes everything you need to cover to successfully go from idea to your first ten customers.

The workbook is organized just like the book: it follows the six stages of the B2B Innovator's Map, so make sure to keep it handy as you explore the book.

## The six stages of the B2B Innovator's Map



Remember, the journey from idea to your first ten customers has many moving parts and can take months of iteration and discovery. Don't be intimidated! **Use the workbook along with your team to document your progress, your assumptions and risks throughout your journey.** It's your guide for whatever stage you are in.

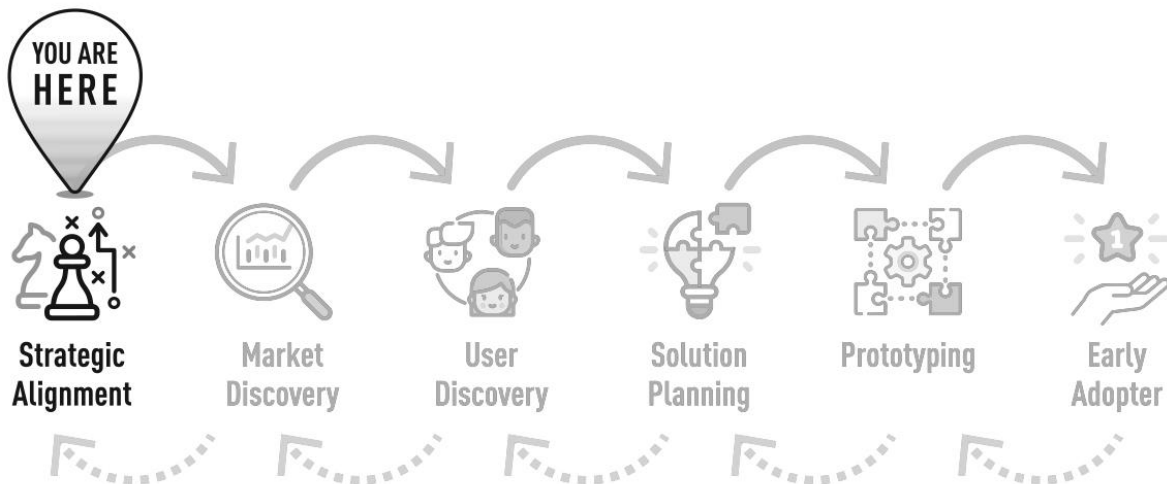
If you're unsure how to complete any of the questions included, go back to that section of the book. And if you'd like to work directly with me to accelerate your innovation journey, feel free to contact me at [danielelizalde.com/contact](https://danielelizalde.com/contact).

Best of luck on your product innovation journey!

## Stage 1 - Strategic Alignment

The goal of the Strategic Alignment stage is to get agreement with your leadership team on the customer business outcome you plan to explore. Without this alignment, your innovation efforts won't go very far, so make sure you pay special attention here!

Based on the B2B Innovator's Map, you are here:



Note: Refer to the book's chapter two for all the details, tools and techniques to navigate this stage.

**1-1 What is your product/initiative name?** (Even if you don't have a formal name, create a code name and use it to create shared understanding.)

**1-2 What is the customer business outcome you plan to solve with this product?**

**1-3 Why does your company want to launch this product?** (What is the internal business driver?)

**1-4 Within your company, who is the final decision maker, and who are your stakeholders?** (List them all.)

**1-5 List any objections or roadblocks you encounter that can derail your innovation journey.** (The sooner you address them, the faster you can move on.)

**1-6 Who are the members of your innovation team?** (List names, roles, and what they can contribute.)

**1-7 Who are the members of your internal Advisory Board?** (List names, roles, and what they have agreed to contribute.)

**1-8 What metrics will you use to track progress?** (List the metrics for each stage of the innovation journey.)

**1-9 How and how often will you report progress to your Advisory Board?**

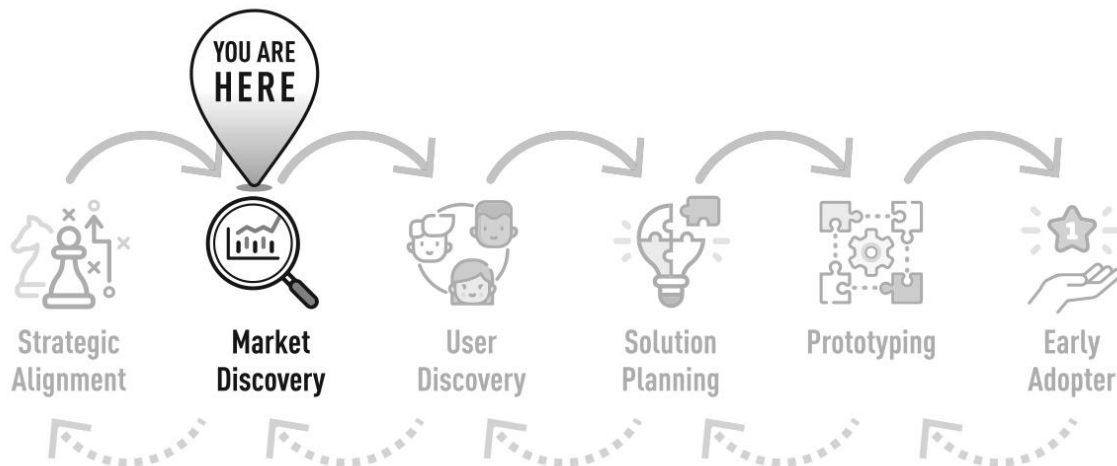
## Stage 2 - Market Discovery

Many products fail because companies are afraid of narrowing their focus and selecting a specific target market. But this approach can backfire! The broader your focus, the more difficult it will be to identify a concrete problem to solve and determine if your product can deliver value to a particular customer.

The goals of the Market Discovery stage are:

- Select your target market
- Research your target market's size
- Understand your Champion's needs
- Get buy-in on your target market

Based on the B2B Innovator's Map, you are here:



Note: Refer to the book's chapter three for all the details, tools and techniques to navigate this stage.

**2-1 What target market do you plan to explore?** (If you are initially exploring more than one market, enter them all here,)

Target market:

- Industry:
- Company size:
- Geography:
- Champion (title of the person responsible for a business outcome):
- Use case:

**2-2 Why did you select that market?** (Include any evidence or competitive advantage you have today.)

**2-3 What is the size of your target market (TAM or SAM)?** (Include the data you used to calculate its size.)

**2-4 Is your target market big enough to entice your company to continue investing in this area?** (Elaborate on the reasons why.)

**2-5 Based on the customer business outcome you want to explore, create a list of people that match the criteria of your Champion (i.e. the person responsible for that business outcome).**

Pro tip: To understand your customer's pains, you need to interview around 8–12 people that match your Champion's profile. Many of the people you contact will not be available or willing to participate in your discovery efforts, so I recommend having a pool of about 30 people to interview. Work with your team to identify candidates and enter them in the list below.

Name	Title	Company	Interview status (not contacted, scheduled, done)

**2-6 Based on your interviews, summarize the biggest needs of the Champion in your target market.**

**2-7 Describe the scenario in which the needs occur** (When, how often, for how long.)

**2-8 What is the impact that this pain has on your Champion?** (Measure impact in cost, time, or revenue loss.)

**2-9 What is your Champion doing today to mitigate this pain? How successful have they been with this approach?** (List everything they've tried, including competitive products.)

**2-10 If you discovered a critical pain for your Champion, then craft a story you can share with your Advisory Board to advocate for moving to the next stage of the innovation journey (User Discovery stage).**

*(Example story: Directors of Operations responsible for large wind farms in the United States struggle to meet their revenue goals because they lose money when wind turbines break down unexpectedly. This is a serious problem because about 10 turbines fail every month. When a turbine goes offline unexpectedly, it takes months for parts to arrive and service to be scheduled. Meanwhile, the turbine is sitting idle, not generating energy and revenue. This problem is particularly costly in off-shore farms where replacement parts can take up to 2 months to arrive, making the downtime even longer. Wind farm operators lose about \$xx per day for every turbine that is not working. They also incur penalties of \$yy for not keeping their SLAs with the grid operators. A solution to this problem could save them \$zz per year.)*

## Stage 3 - User Discovery

The goal of the User Discovery stage is to identify all the users in your ecosystem and do a deep-dive into the life of those users to identify the biggest pains worth solving. Profitable and differentiated products start with a clear understanding of your Champion's AND your user's needs.

Based on the B2B Innovator's Map, you are here:



Note: Refer to the book's chapter four for all the details, tools and techniques to navigate this stage.

### 3-1 Document your User Ecosystem.

Based on your Champion and User interviews, use the table below to document the title or role, of every person who will interact with your product across the enterprise customer lifecycle. All these people, together, form your User Ecosystem.

Tip: To fill out each cell, work with your team to answer the question: who will interact with our product at this stage of the enterprise customer lifecycle? You will need to answer that question for the Customer, Partner, Internal, and Compliance rows at each stage of the enterprise customer lifecycle.

Your goal is not to fill out this table in one go. Instead, use this table as a discovery roadmap of conversations you need to have with your user ecosystem. For every cell, you should either list one or more user types. And, if a cell is blank, you should have customer evidence that no user will interact with your product in that particular cell.

(Refer to the book's chapter four if you have questions on how to complete this table.)

	Evaluation & Purchase	Installation	Deployment	Onboarding	Operations	Maintenance	De- commissioning
Customer							
Partner							
Internal							
Compliance							

**3-2 Create a persona definition for each user in your ecosystem (i.e. each role you listed in the table above.) Also create a persona for your Champion.**

For details on the information to include in each persona, refer to chapter four of the book.

**3-3 Identifying opportunities: List all personas that are experiencing a pain that you could potentially solve with your product. Describe why you are selecting those personas and the opportunities you see.**

(Remember that the opportunity of an individual user must contribute towards the business outcome your Champion wants to achieve. If that's not the case, then discard that opportunity. At this stage, list ALL opportunities and don't worry if you list too many. You'll prioritize those opportunities in the next stage, Solution Planning.)



## Stage 4 - Solution Planning

The goal of the Solution Planning stage is to analyze all the market and user insights you have discovered and define a potential solution to meet your customer's needs.

Based on the B2B Innovator's Map, you are here:



Note: Refer to the book's chapter five for all the details, tools and techniques to navigate this stage.

**4-1 Based on your User Ecosystem interviews, work with your team to prioritize the opportunities and personas that have the biggest needs. Those are the personas that you should focus on first.**

1. Opportunity – Persona(s)
2. Opportunity – Persona(s)
3. ...

**4-2 Draw a Solution Diagram that represents a potential solution to your customer's pains.** (Remember, your solution diagram should not cover every single opportunity and persona. Focus on the opportunities and personas you listed in the previous question.)

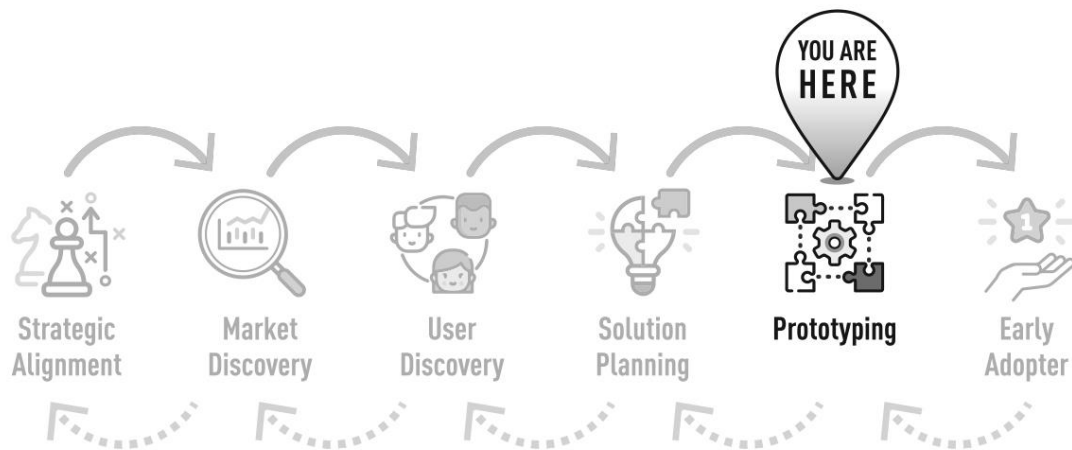
**4-3 Create your experiment roadmap.** (Review your Solution Diagram with your team and write down the assumptions you are making for each component. Then evaluate their importance, the amount of customer evidence you have, a potential experiment(s) you could conduct to test those assumptions, the area you are testing (Desirability, Feasibility, and Viability) and success criteria. Refer to the Solution Planning chapter of the book for more details).

Assumption	Importance (low, medium, high)	Amount of evidence (low, medium, high)	Experiment	Testing for (D, F, V)	Success criteria

## Stage 5 - Prototyping

The goal of the Prototyping stage is to iteratively test and build your solution. In this stage you'll go from paper prototypes to click-through prototypes, all the way to working prototypes that your customers are willing to buy. In the process, you'll test for the desirability, feasibility, and viability of your solution to ensure your product has a future in the market.

Based on the B2B Innovator's Map, you are here:



Note: Refer to the book's chapter six for all the details, tools and techniques to navigate this stage.

**List the evidence you have found for each of the following categories:**

**5-1 Market desirability:**

**5-2 Development feasibility:**

**5-3 Technology feasibility:**

**5-4 Operational feasibility:**

**5-5 Viability of your value proposition:**

**5-6 Viability based on switching costs:**

**5-7 Viability based on the cost of special components:**

**5-8 Internal viability:**

**5-9 Summarize your findings – I have evidence that my product has:**

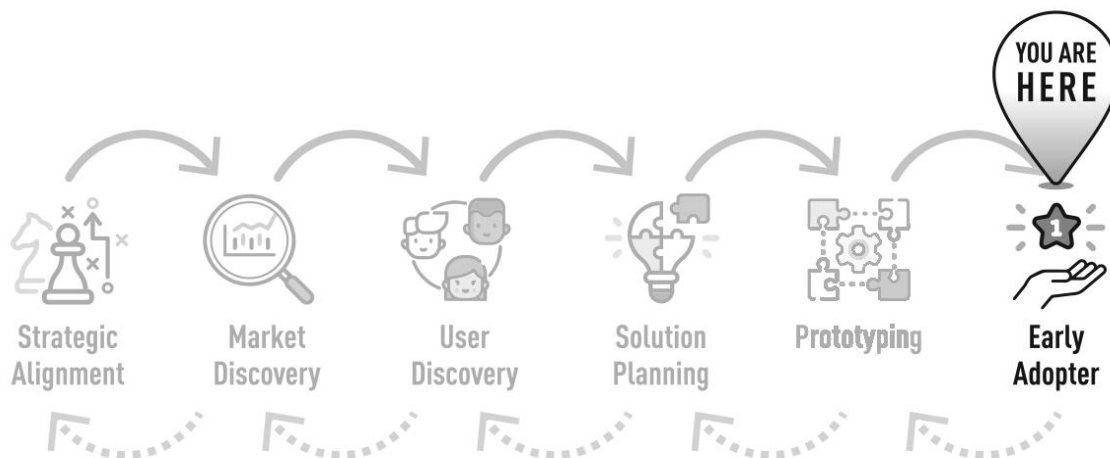
- Desirability (Yes/No):
- Feasibility based on:
  - Development feasibility (Yes/No)
  - Technology feasibility (Yes/No)
  - Operational feasibility (Yes/No)
- Viability based on:
  - Value proposition (Yes/No)
  - Switching costs (Yes/No)
  - Cost of special components (Yes/No)
  - Internal viability (Yes/No)

If you have found concrete evidence of desirability, feasibility, and viability, then congratulations! You are ready to move to the next stage. Otherwise, go back to your Solution Diagram and experiment roadmap and discuss with your team what your next steps should be.

## Stage 6 - Early Adopter

The goal of the Early Adopter stage is to learn what it takes to deploy your solution and deliver value to your first ten customers.

Based on the B2B Innovator's Map, you are here:



Note: Refer to the book's chapter seven for all the details, tools and techniques to navigate this stage.

**6-1 What evidence do you have that you are working with early adopters as opposed to pragmatists?**

**6-2 Describe (in detail) the pilot success criteria that you've agreed to with your customer**

**6-3 How do you know the scope of your pilot is manageable?**

**6-4 How are you ensuring that the value you provide to individual users adds up to value for your Champion's overall business outcome?**

**6-5 What is your plan for working with unengaged customers?**

**6-6 How does your team plan to be ultra-responsive?**

**6-7 List all the areas where you've added instrumentation to your software.**

**6-8 List the areas where you have gaps in instrumentation. How do you plan to address these gaps?**

**6-9 Describe the regulations your prototype needs to comply with and how you are addressing each one.**

**6-10 What stability metrics are you defining with your team, and what is your plan to meet those metrics?**

**6-11 What security metrics are you defining with your team, and what is your plan to meet those metrics?**

**6-12 What safety metrics are you defining with your team, and what is your plan to meet those metrics?**

**6-13 How are you ensuring the privacy of your customer and company? What metrics will you measure against?**

**6-14 What steps are you taking to maximize the sustainability aspects of your product?**

**6-15 What measures are you taking to ensure your product is ethical?**

## Your Next Steps

Congratulations on all the work you've done to accelerate your innovation journey. Now, don't be discouraged if you don't have the answer to some of these questions or if you have to loop back to previous stages of the B2B Innovator's Map. That is normal. No company goes from idea to their first ten customers in a straight line.

By going through this workbook, you are setting the foundation for a robust, customer-centric approach to innovation. You are ahead of most companies, and you are well on your way to delivering a successful product to market!

And remember, if you feel that you need additional information or support at any point in your journey, please let me know. [Contact me and let me know how I can help you and your team accelerate your B2B innovation journey.](#)

Keep innovating!  
Daniel