

# JETPACK

STAGE 4



GOAL  
IDENTIFICATION



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# INTRODUCTION

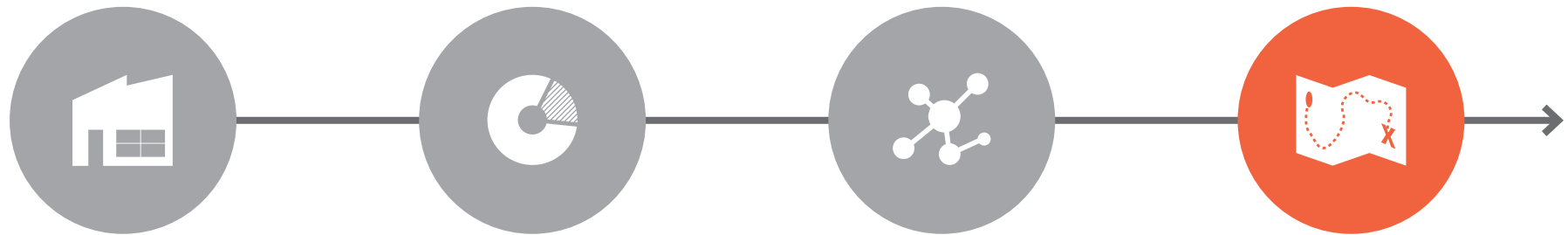
Each workshop within this series is intended to build and develop upon each other, acting as pieces of a whole. This final workshop will guide you through the research process and prepare you to move forward and set goals for your venture. Throughout this process you will achieve the following goals:

- How to set objectives and phasing for your venture
- An understanding of different types of funding and what they mean
- An understanding of the value of user research and how to do it
- The development of personas for your customers

The objective of this workbook is to provide you with a written resource that works along side the workshop session. Each of the four stages provide a workbook tailored to the goals and method of the event. It is your objective to write and store your data from the workshop within the workbook provided. As you take part in each of the following workshops you will have a compiled resource book that is geared toward understanding your business or organization's soft assets.

# PROCESS

JETPACK® is a four-stage toolkit for identifying and developing the soft assets of your venture. Each stage is designed and organized to build upon one another while providing you with a process and series of tools to better understand your venture's business model, brand, and development needs. As you move through the stages, JETPACK® will provide you the capability and empowerment for starting your venture be it a new business or non-profit organization.



## BUSINESS IDENTIFICATION

Understanding how the opportunity is delivering value to its future customer within a business context.

## MARKET IDENTIFICATION

Identifying the assets in a community, global, or market landscape that have an influence on your concept.

## BRAND IDENTIFICATION

Capturing the elements that surround the opportunity to cultivate and develop and authentic brand and story.

## GOAL IDENTIFICATION

Building the foundation and ability to assess, identify, and move forward with the future opportunity.

# GOALS, OBJECTIVES, & MEASURES

The framework is designed to help you plot goals within the time spans of: three months, six months, nine months, and a year. When the GOS sheet has been completed you and your team will have a strategic takeaway from which you can leverage going forward. It is important to set goals and objectives annually as they help your venture stay on target and they provide a method for ensuring you achieve what you set out to do.

## **GOALS**

For each of these blocks of time, choose at least two goals you would like to achieve. Your goals are what you are looking to do, but be realistic about your capability and that of your team's ability. You should choose goals that will be a benefit to your venture, this could be obtaining a business license or prototyping a new product.

## **OBJECTIVES**

Underneath each set of goals, you then must strategize how you might achieve those goals by listing three to five objectives. These objectives act as your tactics for making your goals a reality. How will you do what it is you want to do?

## **METRICS**

The last element of the framework looks at ways to measure success of the objectives and goals. To do this you will list a series of different approaches to gather data, this could include sales, net profits, page views, or increased customer reviews – the proper forms of measurement will be dependent upon the goal.



# GOALS, OBJECTIVES, & MEASURES

30 DAYS

90 DAYS

GOALS

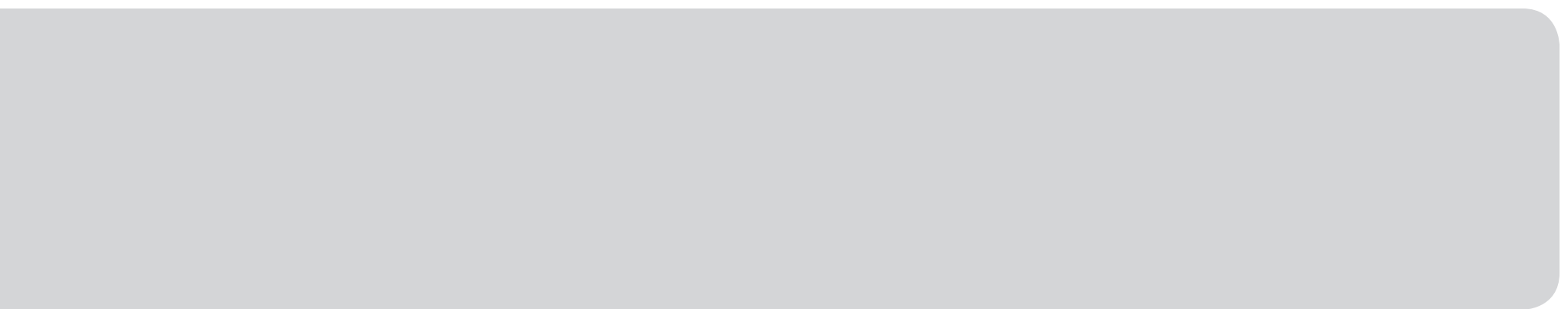
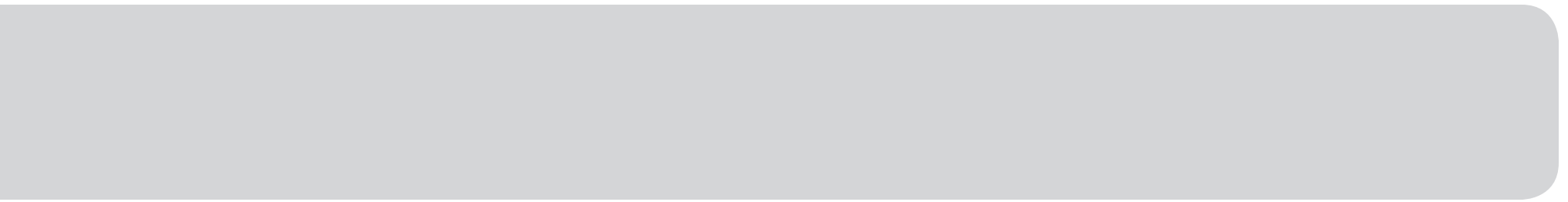
OBJECTIVES

MEASURES



6 MONTHS

1 YEAR



# TYPES OF FUNDING

Funding can be important at a variety of different levels for your venture, but understanding the different types of funding available can be a challenge. This list is not one that is comprehensive, but it will provide you an overview of what exists. Depending upon your venture and your goals for that venture not all of what is in this list may apply to you.

## LOANS

Loans are one of the most typical forms of financing done by banks and other institutions. It is a method for receiving money that one pays back with accrued interest over time. When a loan is received it takes the form of debt against the individual owners or venture, which they pay back.

## EQUITY

Equity is form of finance capital that does not take out debt like a loan from a bank; rather equity is an infusion of capital into your business for a percentage of ownership. This is typical of Venture Capitalists, Angels, and other forms of investors that are seeking to finance a company or organization at different stages to ensure it grows. Just as with a bank loan, investors are assuming risk by putting money toward your venture but in return they also take part of the company.

## CROWDFUNDING

Crowdfunding has been in existence for generations as an approach to raising money from a variety of sources for a specific project or goal. There are many different forms of crowdfunding available such as fundraising and online websites like Kickstarter, Indigogo, and Rockethub.

## SPONSORSHIP

Sponsorship is another investment tool that you can leverage. Sponsors are individuals, organizations, or groups that donate money for specific causes, events, projects, or reasons and their donations can be either financial or as in-kind goods.

# TYPES OF RESEARCH

There are many different approaches to learning about your market and your customer and gaining insights for your venture. The two most important approaches are Market Research (Quantitative), numbers and figures, and User Research (Qualitative), personal and emotional, data. Understanding both and using them will empower you to know the changing dynamics of your market as well as the types of customers you cater to.

## MARKET RESEARCH - QUANTITATIVE

Market Research deals largely with numerical data and information on the market size, growth, and shape. This quantitative data allows you to track and monitor the projected growth and climate of your industry and the industries that supply your venture. Market Research is important because it helps you to remain knowledgeable of emerging trends and drivers that can impact your venture.

Methods: Industry Statistics, Trend Data, Media and Database Searches, and Published Figures

## USER RESEARCH – QUALITATIVE

While Market Research focuses on the macro, User Research looks at the individual and their behaviors, wants, needs, and desires. Understanding your customers and how they engage with and feel about your brand over other brands allows you to remain ahead in your market. It is important to conduct User Research often to know your customers, as they will provide you access to greater opportunity and insight for the future.

Methods: Interviews, Surveys, Shadowing, Journey Mapping, and Persona Development

The power of combining both will give your venture an edge allowing you to innovate in ways you might not have expected.

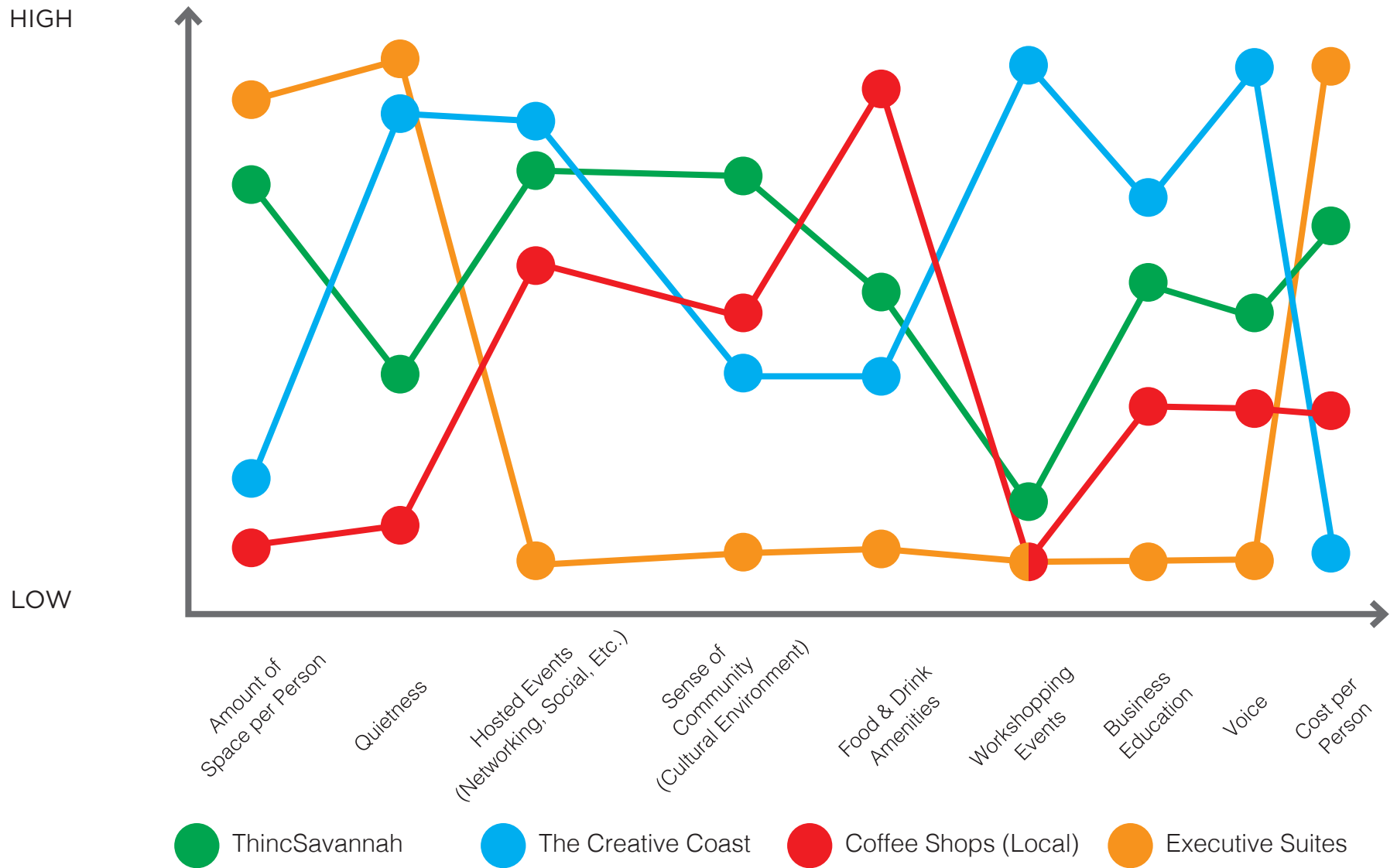
# STRATEGY CANVAS

Visualizing your competition based on industry attributes is a useful process of exploring where you are competing based on value. The Strategy Canvas, derived from *Blue Ocean Strategy*, will help you see how you stand against your competition and the rest of your market. The information that you choose to place on the canvas should be rated from low to high value against only three to four competitors alongside your brand.

## ATTRIBUTES

The attributes are specific industry related points of value for your venture. For a coffee shop some attributes might be the quality of coffee beans, atmosphere, or events held. In an airline firm it could be the seating, food and beverage, and quality of the flight. The attributes that you choose should be relevant and consist of seven to ten that fit.

# STRATEGY CANVAS



Example Strategy Canvas: ThincSavannah

# STRATEGY CANVAS

HIGH

LOW





# THE VALUE OF INTERVIEWS

Interviews are an excellent approach to gathering User Research. They allow you the ability to directly talk to your customer base, either current or potential, and gain insight into what the problem you're addressing is and why it is considered one for them. Interviews are an important part to discovering who your customers are and why, and they will provide you with qualitative insights that you might not have expected.

When conducting interviews it is important to not just talk to your customers, but also be prepared and to be strategic about why you are interviewing them. The goal of an interview is to gain information, insight, and listen for relevant data. An interview kit will ensure that you are prepared and have all of the necessary tools you need. Below is a checklist to consider before each interview.

## INTERVIEW KIT

**Plan/Goals/Objectives** – What is you are trying to achieve? Why are you conducting interviews? Be sure to be clear and strategic about what you want to gain from your interviewees. Are you looking to better understand how your customers interact with your brand? Do you want insight into a particular problem you are designing for? When you have framed what you want to achieve you are in a better position to get accurate information.

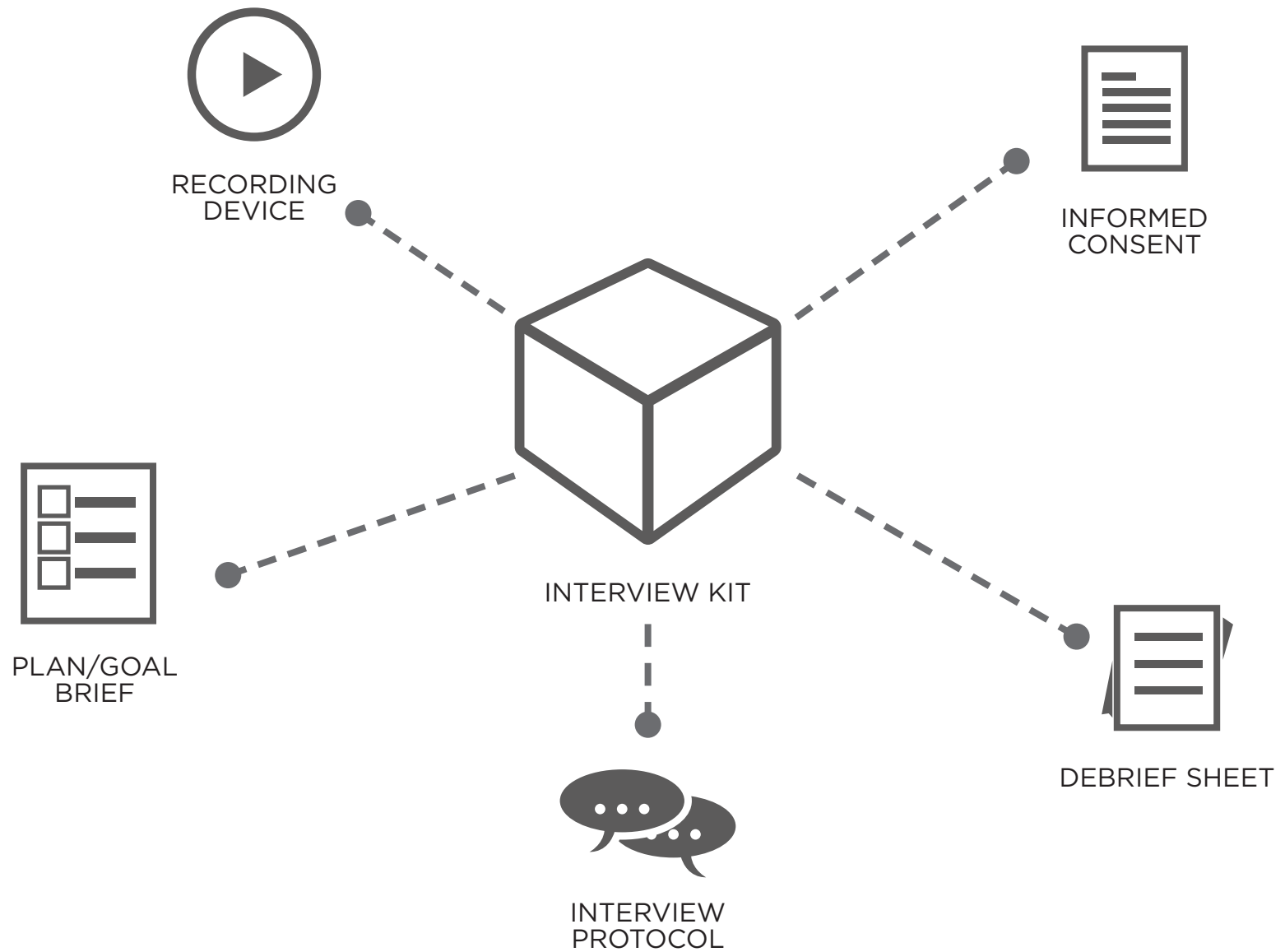
**Informed Consent File** – Consent forms are useful tools to help you customer know what they are getting into when you interview them. The form should include what the interview is about and what the information will be used for. It is also good to include a signature line so that you can be sure that the interviewee documents the event.

**Interview Protocol** – What do you want to ask during your interview? An interview protocol will provide you with a list of consistent questions to help you get started. While interviews should be methodical, they are also conversations that you can participate in.

**Recording Device** – Be sure to record your experience through notes, voice, or video recording. This will give you an archive to reference back to a later date when you a analyzing your data.

**Debrief Sheet (Post Interview)** – What have you learned from the interview? What was the setting and did it affect the interviewee? A debrief sheet for after the interview will allow you to dump your thoughts into a document.





# USER INSIGHTS

Keeping track of your interview experiences, especially the key insights, that emerges from them. When you are looking to start a organizations it is important to push yourself and interview as many customers as you can. These do not always have to be formal interviews but the ventures that understand their customers best talk to them all of the time. It should be your goal to interview at least 100 customers, potential customers, and otherwise to understand your market.

## **INTERVIEW NUMBER CHECK SHEET (100)**

There are 100 spaces to mark your interview progress and help you keep track each one. To truly know your customer it takes at least 100 interviews to understand their needs and how your venture solves their problem. Use this check sheet to mark whether the interview was positive (smiley face) or negative (frowning face) as a way to track each interview and their outcome.

## **USER INSIGHTS (100)**

On the following pages there are 100 spaces to record at least one key insight you gained from each interview. The spaces will give you a location to refer back to over time as you move forward and help you keep track of the work you have done.



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# EMPATHY MAPS

The Empathy Map is a framework designed by the service design firm X Plane. It is designed to help you get into the mind of your customers by looking at how they think, feel, and act. Empathy Maps are a great way to start diving into User Research and understanding who and why they do what they do. To begin, refer back to your Target Customer Groups map from Stage 3 and choose a customer type and give them a name, gender, and age. Imagine what it is like to be them while moving around the map from their perspective of engaging with your venture.

How do they feel about your offering and what is influencing them to come to you?

What do they see before, during, and after engaging with your venture?

How do they talk and act in relation to the offering?

What do they hear and from where or by whom that influence their actions?

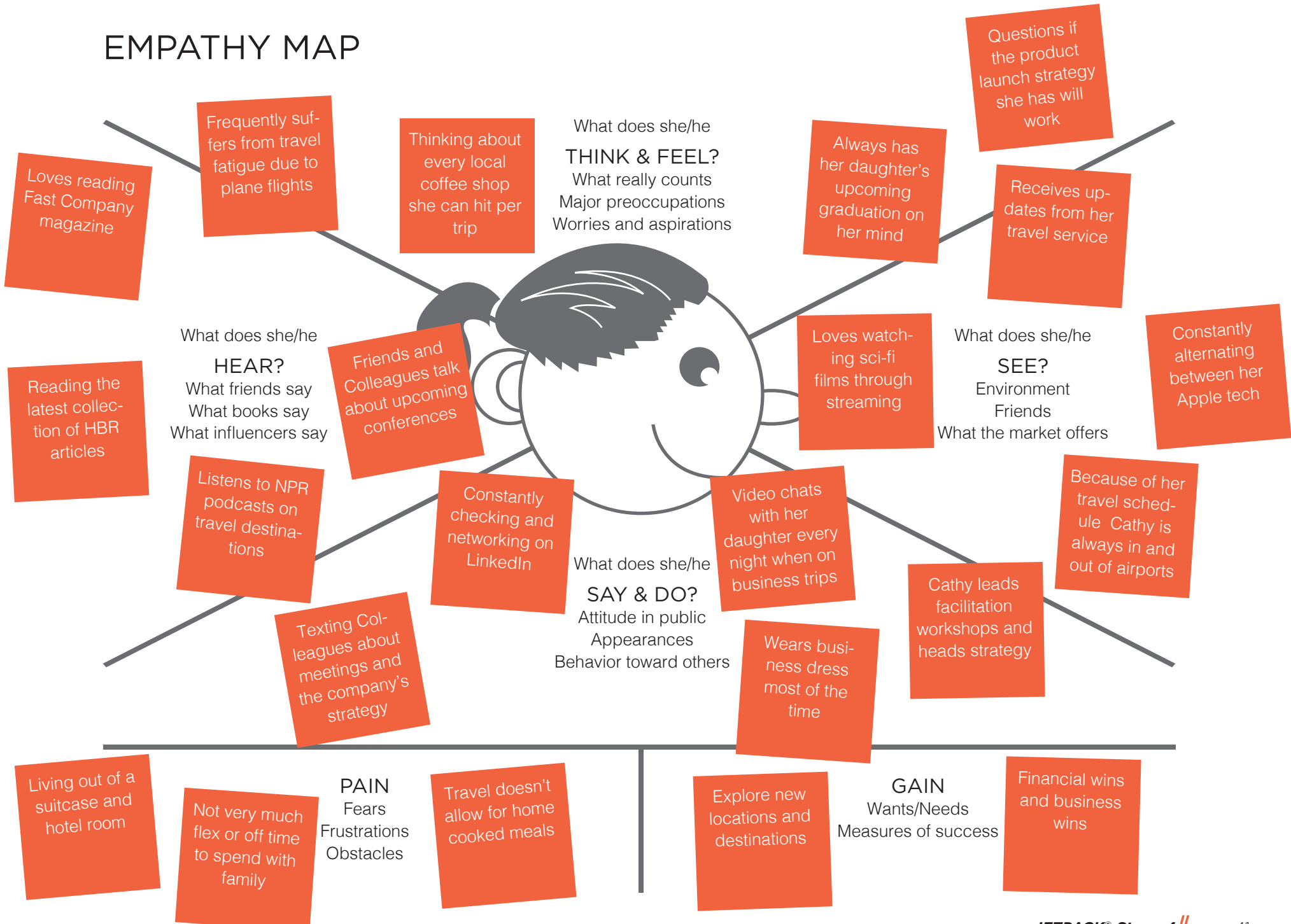
What do they have to gain from your venture?

What do they stand to lose from your offering?

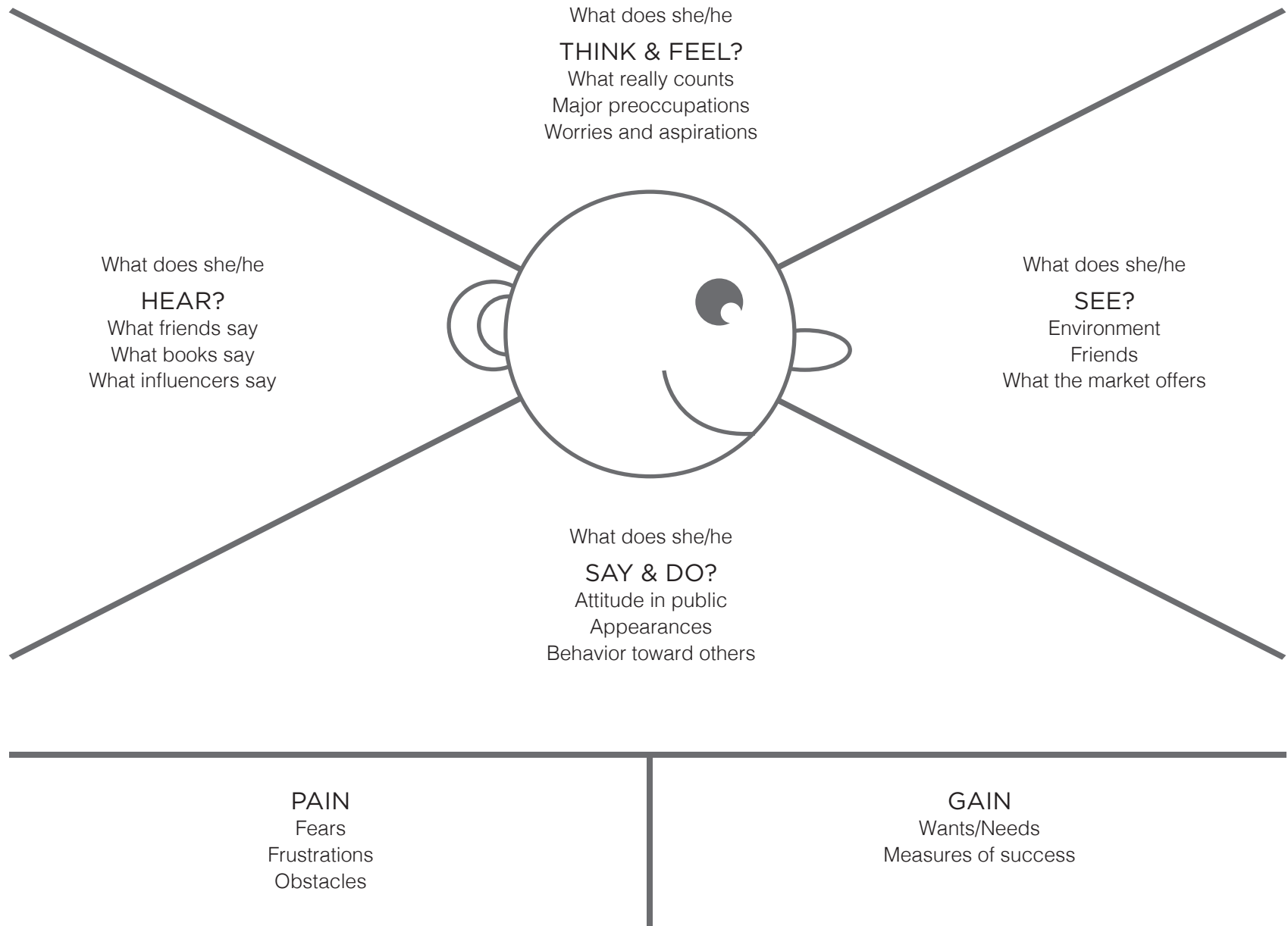
It is important to take into account each one of these sections of the map and be thorough. Furthermore, develop multiple iterations for each of your customer types. This will better prepare you for creating personas of your customers.



# EMPATHY MAP



# EMPATHY MAP





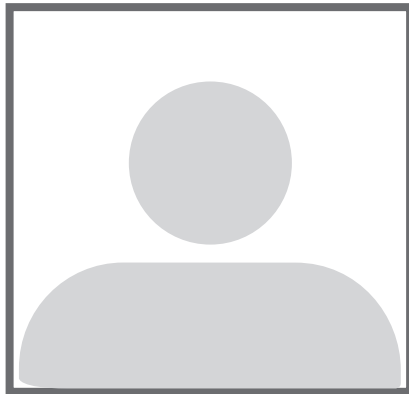
# PERSONAS

A Persona is fictitious customer that is used to help you better understand how people engage with your brand. Personas are a mix of imagination, storytelling, and User Research. They function as an in-depth story of who they are, their background, desires, and drive. You can use a Persona as a tool for explaining who and how individuals interact and experience your brand.

To create a persona take the empathy maps you developed in the previous exercise and begin fleshing them out further. “Who are they really?,” “What is it they do?,” and “What is their story?,” these are some of the questions you should ask yourself as you develop them. A persona should include a short overview of the person, their background and what they do. It will also need basic information such as a name, age, sex, and location. However, it is also important to include their goals and objectives, gains, and pains as way to understand what motivates them to do what it is they do.

You should create at least one persona for each of your customer types and can use the example as a guide for setting your persona up. Remember to experiment and play around with the exercise, but also remember that your goal is to make personas that are based on real data that you gather through your User and Market Research.

# PERSONA



## NAME

Johnathan

## AGE

35

## OCCUPATION

Design Consultant

## GENDER

Male

## BIO

Johnathan is design consultant from Brooklyn, running a small firm. He is married and has a young family that he loves dearly. As a consultant, John must travel frequently to meet with clients, conduct research on site, or attend conferences. While he enjoys traveling and his work it takes away from the time he spends with his family making him upset at the thought of each new trip. To mitigate the issue, John spends at least one to two hours video chatting with his family on trips.

At the office, John can be frequently found in any number of the “war rooms” he has set up for company projects. Since these are a recent installment to the new space, John and fellow co-workers frequently take breaks to see what everyone else is working on. Each space is filled with modern furniture and every employee at the firm acts like a family. This is something that gives John reassurance in that he knows everyone can get the job done.

## GAINS

New clients and new interesting jobs  
Easier travel booking and greater chances to network  
Convenient and fun experiences

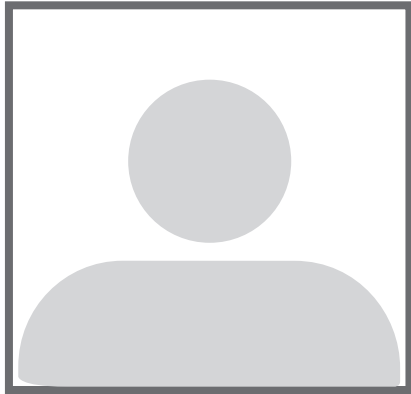
Not only does John frequently travel to bring in new clients and projects for the firm, but he also hosts several client workshops on how design and business foster innovation and design as “thinking” can be a tool for it. When this is the case, he is always well prepared with a suitcase full of office supplies; however, the weight of the luggage often brings on unwanted baggage fees during the flight process.

With every new trip comes the added stress of planning and picking flights, trying to confirm car rentals and hotels. Normally John doesn't get agitated at the process, so much as the time it takes to plan a trip. He is always thinking, “I could be doing something else right now...” However, in spite of it all, John loves to use his tech tools on a trip, like using his iPhone to scan in his ticket at the airport, or social media to post photos of his trip.

## PAINS

Having to constantly travel for work  
Navigating poorly done airline and booking services  
Suffering from travel fatigue

# PERSONA



NAME

OCCUPATION

AGE

GENDER

BIO

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GAINS

PAINS

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# CUSTOMER JOURNEY MAP

A Customer Journey Map is a tool to better understand how customers learn about, engage with, and take away an experience from a brand. They help you visualize the many different touchpoints and channels that a brand can have and how their customers might potentially engage with them.

- Touchpoints are a specific point in time when a user or customer interacts with you (e.g. Talking with Customer Service, Using a Smart Phone, Holding a Product).
- Channels are the ways in which information is being distributed (e.g. Social Media, TV Advertising, Print Media).

## STEP 1

Customer Journey Maps can be complex or simple, but in this exercise you will be examining three phases: the Pre-engagement, Engagement, and Post-engagement. Within each of these phases you will map out the objectives and actions taken by the customer throughout their experience with your venture's product or service.

- Objectives are the goals they want to achieve and why. What is your customer looking to do? How did they hear about you? What brings them to your venture and why?
- Actions are the physical actions that they are taking. What are the key things they do before they come to you? How do they experience your brand? What do they do when they leave?

You will have to decide which touchpoints are key to the venture that a customer might interact with, but also remember that different customers may also have different ways of engaging with you. Try mapping out your different personas, what would the experience look like?

## STEP 2

The second step of this Customer Journey Map is to look at the venture side of the brand and how you interact with customers. This will provide you some guidance by looking at how your brand is being represented. What forms of content it is placing forward, from their social media notifications to the ways in which the staff engages customers?

## STEP 3

The final step of this exercise looks at cost and revenue for the touchpoints of the venture. To do this, you will plot points of cost and points of revenue along the customer journey to begin visualizing elements of profit and loss to the brand. This step is intended to give some insight it where you are placing cost and where you are taking in revenue.

The Customer Journey Map is used to help you to think holistically about how the venture's customers engage with the brand and how to best meet the needs the customers and users.





# CUSTOMER JOURNEY MAP

PRE-ENGAGEMENT

ENGAGEMENT

CUSTOMER OBJECTIVES



CUSTOMER ACTIVITIES



BUSINESS ACTIVITIES





POST-ENGAGEMENT

# CUSTOMER JOURNEY MAP

PRE-ENGAGEMENT

ENGAGEMENT

CUSTOMER OBJECTIVES



CUSTOMER ACTIVITIES



BUSINESS ACTIVITIES





POST-ENGAGEMENT

# THE ONLINESS STATEMENT

The last tool used in Stage 4 is the Onliness Statement, which comes from Marty Neumeier's *Zag*. The Onliness Statement is a simple sentence that helps to better separate the venture from other competing bands and is framed like this, "Our brand is the \_\_\_\_ that \_\_\_\_." This simple statement helps you to summarize all that you have done across the different stages of JETPACK®. As you prepare to move forward this will be one of your greatest venture assets. The Onliness Statement is the most distilled model for promoting what makes you unique and why.

## THE ONLINESS STATEMENT

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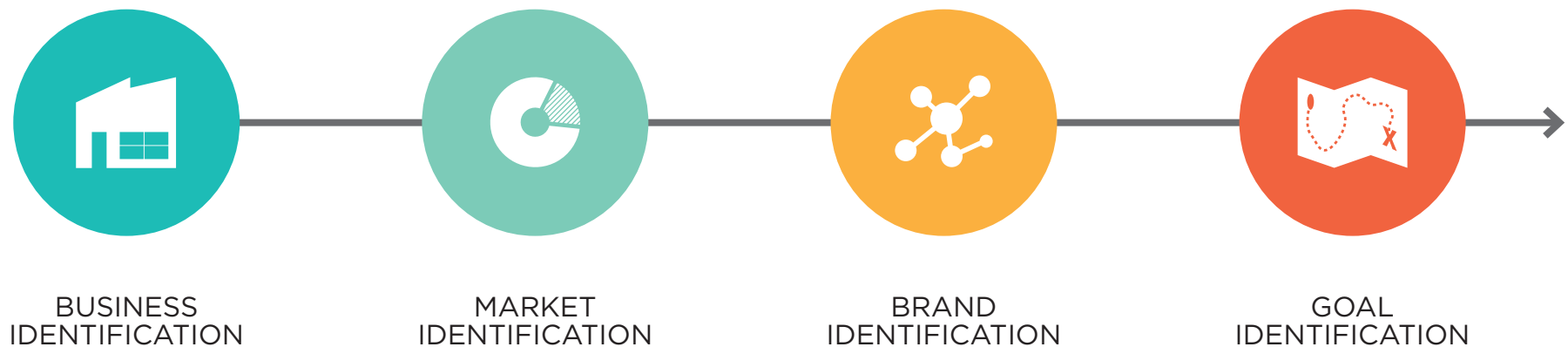
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# NEXT STEPS

You have now completed all four stages of JETPACK® and you hold an entire Opportunity Brief for your venture. It is our hope that as you go forward with the development of your venture that the tools and resources provided here will guide you to take your venture to the next level. As you continue to conduct research and build your business, this toolkit will help you to be critical and well equipped for your current project and those you may have in the future.





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# ABOUT THE AUTHOR

I am a designer, entrepreneur, and researcher who has a deep love for design, technology, and enabling better experiences for consumers. My background has been in strategic planning, brand development, CX, design research and management. Over the course of my career I've worked with startups, SMEs, nonprofits and Fortune 500s to build brands, products and services, and craft transformative strategies through deep consumer insights.

In 2013 I began co-creating JETPACK® for my MFA thesis work on how to leverage design as a methodology for entrepreneurship. This was done alongside the team at Volta Collaborative, Savannah College of Art and Design, and the entrepreneurial economy of Savannah. I believe that design is a critical necessity for any startup and as a process it should be leveraged early and often. By using design as a lens to approach challenges and identify opportunities we can better develop offerings and value propositions that deliver on customer needs and desires in unique and consumer-focused ways.

- Caleb Sexton, Founder/Designer



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