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CTRL+CLICK CAST #076 - Discovery Only with J Cornelius

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[Music]

Lea Alcantara: From [Bright Umbrella](#), this is CTRL+CLICK CAST! We inspect the web for you! Today, J. Cornelius joins the show to talk about discovery-only projects. I'm your host, Lea Alcantara, and I'm joined by my fab co-host:

Emily Lewis: Emily Lewis!

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Emily Lewis: Today we are both really excited to have our friend, J. Cornelius on the show.

Lea Alcantara: [Agrees]



Emily Lewis: J has been making websites and software since 1998 and today is president of Nine Labs where he works with companies far and wide to improve their products and services. Welcome to the show, J.

J. Cornelius: Thanks for having me.

Lea Alcantara: So J, can you tell our listeners a bit more about yourself?

J. Cornelius: Well, you summed it up pretty well. Previous to getting into the internet, I worked in the rock and roll business, so I've seen some people who we would not want to work with in today's day and age.

Emily Lewis: [Laughs]

Lea Alcantara: [Laughs]

J. Cornelius: They taught me a lot about kind of choosing your clients wisely and structuring things in a way that's beneficial to everybody involved in the relationship, but I really lean back on that experience a lot when it comes to providing services to people now.

Emily Lewis: Yeah. It does make a big difference who you choose to work with. I tweeted yesterday I'm getting ready to take a nice break from work, and it's so nice knowing I have Lea.

Lea Alcantara: [Laughs]

Emily Lewis: So I don't worry about being on vacation.

Lea Alcantara: Oh.

Emily Lewis: And you know, I couldn't say that before I found Lea as a good partner to work with.
[Laughs]



J. Cornelius: Yeah, it's really tough sometimes.

Emily Lewis: So today we're going to talk about discovery-only projects, and I think what's important is to first define what that means, and if that's even what should be calling it. So what do you perceive is discovery-only or a discovery project?

J. Cornelius: Well, I think that name is fine. It's exactly what it is for us. It is this discovering whether or not you want to work with that client.

Lea Alcantara: [Agrees]

J. Cornelius: Whether or not it's the style of work that you could actually be effective in, and whether or not they want to work with you.

Emily Lewis: [Agrees]

J. Cornelius: So in a lot of conversations with potential clients, I tell people, "Look, it's like a first date, so we get to know each other a little bit."

Lea Alcantara: Right.

J. Cornelius: "You get to see how we work. We get to see how you work. We can figure out if it's actually a fit and if we think we're going to be able to accomplish something together. It's also nice that it's a fixed fee, it's fixed time frame, it's a fixed commitment, and you know what you're going to get at the end of it, and if you see some value there, then we can think about working together on something larger."

Lea Alcantara: Oh, really interesting. We'll probably talk a little bit more later on the show about that fixed part and the fixed budget, but before we get into that, what types of clients or projects are best



suited for a discovery project or a discovery-only, or is there ever a situation where discovery-only is not a good idea?

J. Cornelius: There are, but they are rare.

Lea Alcantara: Oh, okay.

J. Cornelius: If you think about a lot of the types of projects that creative companies or development companies get involved with these days, there are a lot of questions that are unknown at the very beginning, and one of the things that we tell all of our clients is the wrong time to begin making decisions on a project is when you know the least about what you need to accomplish, and that's typically at the very, very beginning.

Emily Lewis: [Agrees]

Lea Alcantara: Right.

J. Cornelius: There's actually a chart that we put up on our website about that that it shows basically there's risk curve and there's a knowledge curve and they're kind of opposing each other. At the very beginning, the risk is very high and knowledge is very low, so what we want to try to do is understand as much about what needs to be accomplished and how we're going to go about accomplishing those things before we make critical decisions about a project.

Emily Lewis: [Agrees]

J. Cornelius: So if you think about it, there's essentially a discovery phase at every project no matter how you scope it and how you set a budget that in the initial phase, you're doing a kickoff meeting with the client or going through this initial phase of asking questions and gathering feedback and kind



of discussing how you're going to go about doing things, and especially when you have a problem that is specific to that particular business or there are challenges, there's never going to be a preconceived survey that you can give them that's going to get you all the information that you need. So we're doing discovery projects in our larger projects anyway, most of us are...

Lea Alcantara: Sure.

J. Cornelius: What we decided to do is break that out into its own phase, which gives us kind of a simple, well-defined breakpoint that both the client and we can look towards to say, "Okay, when we get this far, we can decide what we're going to do next."

Emily Lewis: Well, before we talk about like the details of what might be in that, I'm curious, why did you, at Nine Labs, decide to break this out? What was the business decision of offering this versus just doing the more traditional approach where discovery is part of a larger project?

J. Cornelius: So one of the things that I keep in mind is that we're primarily a user experience design firm, and so I try to keep in mind what is the client experience of working with us because that is ultimately what we do.

Lea Alcantara: [Agrees]

J. Cornelius: And if we ignore that experience, then how can we be good at creating experiences for their clients?

Emily Lewis: Right.

J. Cornelius: So we saw that a lot of clients in a lot of projects would end up having to kind of be recalibrated after a couple of weeks or after we did some of these initial exploratory meetings, and a



lot of times that would lead to change orders or updating the statement of work or having to update the budget and none of those are comfortable conversations to have.

Emily Lewis: [Agrees]

J. Cornelius: So it made more sense to us to, “Hey, look, let’s get all these preliminaries stuff out of the way upfront, that way when we start on a project, we actually know what we’re going to do.” And another situation that’s come up a couple of times is we would get involved with a long-term project with a client, and about a month in, we’d realize we really just don’t like working with these people.

Emily Lewis: [Agrees]

Lea Alcantara: Right.

J. Cornelius: They don’t listen to what we do. They’re not coachable. They don’t value our opinions and our expertise, and so this project is going to be a challenge for the next six to nine months, and that’s just not a situation I want to put the team in.

Emily Lewis: [Agrees]

J. Cornelius: So by breaking that out into its own piece, it enables us and the clients to determine a few things: A, is this the person that we want to work with on both side? B, is this project worth pursuing? Do we have it scoped properly, or is there going to be some big gotcha that we didn’t think about, or potentially, is this project easier than we thought it would be?

Emily Lewis: [Agrees]

J. Cornelius: Are we looking at it the right way? Are we solving the right problem? And so by breaking it out into a discovery, it enables everybody on the team, both the client’s team and our



team, to get their heads around a problem in the right way and then decide what you're going to do next rather than making a big commitment and then having a big oops moment a couple of weeks or a month later and deciding that we have to recalibrate everything and having that unfortunate and uncomfortable discussion.

Emily Lewis: Well, in terms of this separate engagement, this discovery engagement, what should the client expect? Is it pretty much a one-to-one with what you would have as part of the more traditional part of a larger web project, or is it different in some way?

J. Cornelius: Well, it depends on what the client is asking from us. If they're coming to us and saying, "We need to redesign our website," then the first question we ask him is, "Why do you think you need to do that?"

Lea Alcantara: Yes.

J. Cornelius: A lot of times that comes down to a different business problem. Sometimes it's about the aesthetics or it's about some usability issue that's pretty well defined, and we've all seen in recent years the rush to be mobile friendly and the rush to kind of redo responsive retrofits and all of these things, how things would look on a phone, but often there's an underlying business goal that they have that doesn't come up in that design question, and so that's the essence of what we want to get to is what business problem are we trying to solve. So by understanding what the business problem is, it changes what we try to accomplish in that discovery session.

Emily Lewis: [Agrees]

J. Cornelius: Sometimes that discovery session is really around understanding their customer better so that they can reform their value proposition and it's not about redesigning the site from an



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aesthetic perspective, but changing the positioning and changing the messaging that they're using so their site is actually more effective for them. Sometimes it's a matter of what your real problem isn't this marketing thing that you're going through, but your real problem is that your mobile app sucks and you need to redesign the UI.

Lea Alcantara: Right.

J. Cornelius: So you're coming to us with one problem, but let's figure it out how we can actually help the business, and the way that we structured a lot of these discovery engagements is we actually have 14 different things that we can do and they're pretty well compartmentalized, everything from a usability assessment to a digital brand affinity audit where we go and look at all the ways that people are interacting with the brand online and give the client kind of an assessment of that to value proposition design and usability studies and persona development. So the first thing that we do when we identified a new client that we started that discussion is try to understand what the business problem is they're trying to solve and then use the correct discovery engagement to help and scope the solution to what that's going to look like.

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Emily Lewis: Hmm, that's interesting.

Lea Alcantara: So I'm curious about those 14 different items. So it sounds like you've really narrowed down the scope of every single one of those 14 items and then what you're saying is that once you have that conversation with the client regarding their business problem, then you choose which of those 14 applies to them. Is that your process?

J. Cornelius: Yeah, pretty much.



Lea Alcantara: Okay.

J. Cornelius: And it's not where we go into a room and come out with the answer.

Lea Alcantara: Right.

J. Cornelius: It's a very collaborative process with the client. That's something that we can usually do in a 20 to 30 minute introductory call with them.

Lea Alcantara: Right.

J. Cornelius: It's where we basically explain the way that we work, the types of things that we can do, and it's a lot of me asking questions of them about what is it that they're trying to accomplish to see if there's a fit. If there is, then I'll say it sounds like the best next step for you is to do one of these discovery sessions, and I think the persona development session is really going to be the thing that helps move your business to the next level.

Emily Lewis: [Agrees]

J. Cornelius: I'm going to send you some information about that, and if it seems interesting to you, then let's set it up.

Emily Lewis: Okay, so what I'm hearing, and I think this answers this question I just wrote down, so you're basically talking to the client this lead during your sales process to identify what that business problem is, and once that's answered, then you essentially try and sell one of these discovery projects. So there are some of these that is happening in the sales process where you aren't engaged.



J. Cornelius: Yeah, absolutely, and that's part of where the discovery projects are really attractive to us and also to the clients because they've heard in the marketplace, "I need to get my website redone," and someone has told them, "Well, that's going to be \$50,000," and then somebody has told them like, "No, you can do it on WordPress for \$2,000."

Lea Alcantara: [Agrees]

J. Cornelius: And so they don't know what to expect.

Lea Alcantara: Right.

J. Cornelius: And so by giving them something that is pretty well defined and void of ambiguity that helps them feel more comfortable about stepping into a process.

Emily Lewis: [Agrees]

J. Cornelius: And from that point, like once we do a persona development project for somebody, at that point, we will be able to advise them on what is this smart next step. Should you actually redesign your site or your mobile app? Should you work on your user journeys, for example, or do you need to do a usability study, or what is the appropriate next step? And we can give them a timeline and a budget for accomplishing whatever that next step is.

Emily Lewis: [Agrees]

J. Cornelius: So it gives them some certainty in the process and helps them feel comfortable about going into something from an educative perspective instead of just trusting whatever the fancy web people tell them.



Emily Lewis: So you've described you have like 14 different types or types of sessions that you might provide. Is there something that's always included in all of them regardless once you have engaged with this discovery process?

J. Cornelius: That's an interesting question. I wouldn't say that there's one particular thing other than like me or Brad or somebody from the team participating, that's in every session. You could say that the outcomes are very similar and that typically these are done in our office. On the white board, there are lots of photos being taken. There are exercises that we go through. It's actually not a very screen-intensive process. They aren't looking a lot of stuff on the screen.

Emily Lewis: [Agrees]

J. Cornelius: It's really about talking and answering questions and kind of working through problems on a white board. So every project is going to have some photos that come out of that. There's going to be a lot of notes taken, and then at the end of it, there's going to be kind of a summary report where we say, "This is what we think the next best step is. This is what the timeline and the budget looks like, and there are a couple of options for how you might want to proceed." So in terms of the thing that's consistent between all of them is that deliverable at the end.

Emily Lewis: [Agrees]

J. Cornelius: And that is the suggestion for what happens next and the notes and photos and things that come out of the exercises.

Lea Alcantara: Cool. So can you actually tell us what those 14 types of items in your discovery process are?



J. Cornelius: Yeah, there's a list of them. I could look it up for you, if you don't mind a little clicking around here.

Lea Alcantara: Not a problem.

Emily Lewis: Well, and while you're poking around, I think it's worth introducing something to the discussion that Lea and I have been doing with these discovery projects. We almost have – I guess the best way to describe it is different levels, and it's really more of different levels of engagement with a client and as well as what they would get from it and the price points that we aim for.

J. Cornelius: [Agrees]

Emily Lewis: And so for us versus specialized discovery, like your 14 different specialty areas, we're selling a \$500-level consultation that comes with conference call, recording of the call and then a summary report, and then there's a middle level one where there is more audience analysis and brand analysis and things like that also comes with the summary report, and then there's the more robust one that's a more I guess project roadmap like the full shebang of our complete analysis of their audience, what they need, what their goals are, what we think it's going to take to get there both in terms of the technology as well as the time and the budget. So those are different levels. Have you ever worked with something like that?

J. Cornelius: Yeah, we sure have, and we do that too in extent, so we've got a simple proposal that we'll send out, which is essentially what you just described, and for that we call it basically a project kick start.

Emily Lewis: [Agrees]

Lea Alcantara: Oh.



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J. Cornelius: So it can be a half day, it can be a full day or it can be two days, and the outcomes and deliverables that you could get as a result of those sessions are dependent upon how much time we have in the session. So for the half day, it's basically a discussion and out of that you get a pretty broadly-scoped project. In the full-day, obviously you get more fidelity, and the two-day, you get even more fidelity. So that's something that we offer as one of the kind of workshop options, so that's number one, I guess you could say or number 14, depending on how you want to look at it. Some people are comfortable doing that, but what I've noticed is that it's depending on the size of the organization that you're dealing with.

With larger organizations, they don't really see a lot of value in doing something that's that smaller than engagement, because for them, the political effort it takes to bring in a new vendor is the same whether it's a \$1,000 project or a \$10,000 project, so in the budgets that they're working with, that doesn't make sense. So that tends to make sense of the smaller, independent people who are startups or kind of like that stuff, and for the larger work, they want something that's a little bit more defined and has a more predictable outcome.

Emily Lewis: I love what you described that, as you said, project kick starter or kick start.

J. Cornelius: Yeah, project kick-start.

Emily Lewis: I love that, because, honestly, I think the clients we talk to, discovery-only or discovery, it's sort of like glazed eyes.

J. Cornelius: Yeah.



Emily Lewis: But if you've put it in terms of a project kick-start, I think anyone can connect with those terms. It's a really small thing in the broad sense of what you're giving them, but I think as a sales tool, that's a good label to call it.

J. Cornelius: Yeah, I agree, and that's why we call it that. It's that people tend to resonate with that and it also implies that there's something that is going to come after this, so it's a setup for something that's going to come later.

Emily Lewis: Right. I love it. [Laughs]

Lea Alcantara: Smart.

J. Cornelius: So I have the list of things if you'd like to hear it.

Emily Lewis: Yes, please.

J. Cornelius: So consumer insights, which is basically what's important to your potential customers, and that's kind of a customer discovery mechanism where we do an empathy map and we do a couple of other exercises to help them understand who their target market is. A persona development workshop, which is exactly what it sounds like, we do value proposition analysis and development workshop. We do another one that's called "know your customer," which is essentially a week or two of customer research, which is book-ended by consumer insights on one end and the value proposition development at the end.

Emily Lewis: [Agrees]

J. Cornelius: A digital brand identity assessment, which is basically what do people think of your brand, what are they saying about you on various online channels, depending on – and again, that's



one that has a couple of different levels so you could do it light, you could do a small or medium or large, and we call it something different, but you get the idea.

Lea Alcantara: Right.

J. Cornelius: Depending on how intense they want to go, how many channels they want to look at, how much analysis they want. There's a brand affinity assessment, which is kind of an extension of that identity assessment workshop. There's a messaging strategy workshop where we based on what they already know about their customer, we do some marketing messaging strategic work to help them understand if they're talking to the right person in the right channel at the right time and what words they should be using and so on.

Emily Lewis: [Agrees]

J. Cornelius: There is marketing automation kick-start, which is essentially what it sounds like. We'll help you set up a landing page and tie that to a drip campaign in your automation tool choice. Digital marketing strategy kick-start, which is essentially what it sounds like, to help people understand what they need to be doing, what funnel they should be utilizing, how to leverage certain tools, which tools they might want to use based on their budget and their other requirements. There's a social media strategy assessment, a product ideation workshop, which is really popular with people who are working through maybe a new version of a web app or a new version of a mobile app or startups who are trying to figure out what they need to build.

Emily Lewis: [Agrees]

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J. Cornelius: Application usability assessments. There's overall user experience assessment where we look at whatever their app or service or website, whatever it might be and just to kind of figure out what do people think about this thing and what type of experience are you giving people, and that really relies on our expertise and our experience at having this for so long because we don't really have time to get in and do a lot of objective measurements.

Emily Lewis: [Agrees]

J. Cornelius: But it sets them up for thinking about how small changes or even larger changes in the way that they're presenting themselves can have a big impact on the business goals, and then the last one is those discovery and kick-start the small, medium and large engagements where we help them figure out what project they need to be doing.

Emily Lewis: This is amazing, I've not heard this approach before, and it makes a lot of sense to me. I'm not sure if it would make sense for like a smaller agency such as Lea and myself, but then again, maybe not 14, but maybe we might find three different types of buckets that might really align with the type of work or services that we provide.

J. Cornelius: Yeah, of course, you do a slightly different work than what we do. You're more in the development and the design space than we are. We're more in the strategic and experience design space.

Lea Alcantara: Right.

J. Cornelius: So the type of work that we are going to put into these workshops is not going to be similar to what you would do.

Emily Lewis: [Agrees]



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J. Cornelius: So I think even for small groups or maybe even, especially for small groups, it makes a lot of sense to break things out into smaller chunks to initially make that connection with the client and establish a working relationship with them. In a way, it leverages a bit of psychology because if I ask you for something small now, then you're more likely to give me something big later.

Lea Alcantara: Absolutely.

J. Cornelius: And a great example of that is, "Hey, Lea, can I borrow a dollar?" You're like, "Yeah, sure." And then tomorrow, "Hey, Lea, can I borrow \$20?" Right, you're more likely to loan me the \$20 if you've already loaned me a dollar and it's been repaid to you.

Lea Alcantara: Right, right.

Emily Lewis: I also think the thing that I'm also connecting with that I think Lea and my clients would connect with is sort of the value proposition of these specialty areas. I think the project kick-start is a really great way of introducing this, but I also think the way you described that it's a focus on your marketing or a focus on your users, and so you're sort of telling them a little bit more than, "Oh, this is just a roadmap." You're saying, "We're going to give you some focused information on this area that you really seem to need right now."

J. Cornelius: Yeah, exactly.

Emily Lewis: I'm curious, with your team, do you have your staff? Essentially, you have five people who always do the marketing affinity. You have three people who always do the user – I forget the one you mentioned, but getting to know the audience more, or is it all sort of everyone shares these specialties and so anyone can step into these roles?



J. Cornelius: No, there's a good division of labor based on discipline. So a good example is if we're doing anything that involves research, usability, doing persona development, like that's more of a UX research and/or marketing discipline, so there are two people on the team that typically handle that. If it's more about branding or visual or experience design and thinking through like interaction design, that's a different set of skills and so that's something that a different group of people handle. Our shop is really kind of divided down the line of the marketing and strategic kind of messaging the perception of what's happening side, and then there's the more utilitarian with UX, which we think of as kind of a traditional UX discipline side. So the workshops are kind of follow along those lines, but there's a lot of crossover.

And I guess stepping back, it's probably important to understand the philosophy of how we got here, which is I've done a lot of work with startups and startups are notorious for chasing an idea the founder has and he's infatuated with the idea, and whether or not it's a good idea or how validated, it is that people actually want that thing, and so we've seen a lot of companies who have a product or a service in the marketplace and they've never done the fundamental research to understand what value it is that they're providing to their clients and why people care, and so they may start to struggle with things like increasing market share or reducing churn or increasing retention rates and they don't know where to start and they don't know that, fundamentally, user experience design can help them understand that, and there are a lot of things that we've learned from some of the teachings of the startup world with business model validation and value proposition analysis that align almost perfectly with a lot of the things that you're taught in kind of the basis of user experience with how people perceive problems and how they value different things that can help them get to their goals and kind of empathy mapping, and some of these fundamental tools are very, very similar.



So what I've done is just seeing all the similarities between those things and created a way of kind of merging those two disciplines to say, "Look, if you want to grow your business, you've got to care about your users, and if you're going to care about your users, you need to know about these things, so let's not look at what needs to be in your navigation and how you need to maybe structure things or lay things out on a website until we understand what goal it is that your users are actually trying to accomplish. Once we understand that, then we can go through and actually do all this other work."

Lea Alcantara: It seems like a lot of really discovery is about kind of challenging people's assumptions and testing people's assumptions as well.

J. Cornelius: [Agrees]

Lea Alcantara: And it looks like you breaking out all the 14 different items that you can dive into to a business, that didn't happen overnight. So I was wondering like when you were trying to figure out what these parts were, like how did you decide, "Okay, we really need to break these down into these points"? And additionally, as you're going through these processes, were there any obvious mistakes you'd like to tell our listeners to try to avoid when you're going through a discovery process?

J. Cornelius: Yeah, so you're right, it didn't happen overnight. A lot of it just came from paying attention to the conversations that we were having with clients and seeing what their pain points were, and a lot of ways, as simple as it sounds, it's drinking your own Kool-Aid and making sure that we set out and preach every day, "You've got to listen to your users," but then do we listen to our clients? Well, we do, but I mean, do we really like on a macro level?

We listen to each individual client to make sure that they're happy, but on a macro level, are we thinking about what is it that clients are really trying to solve, and how can we apply our skill set to



help them solve that problem and actually bring more value to their business than what A originally intended us to do? And I think that's a great, great service to them. In terms of mistakes, I think the mistake is just not doing that. It's assuming that you know what clients want, and you don't. Another mistake is trying to do things that are outside of your sweet spot.

When I'm talking to people maybe as a potential partner to work with on projects or even a potential client, one of the questions that I like to ask is, "If we put all of your skills and everything up on a dart board, what's in the bull's eye? What is that thing looks like? What is that sweet spot?" And by identifying that and trying to really focus on the things we do well and not focus on the things that we don't do well, that helps to shape the types of services that we offer.

You'd noticed that I didn't say anything in there about WordPress design or I didn't say anything about doing custom application development because those are things we don't do, and I'm not going to pretend that I can advise somebody intelligently about whether they should choose one CMS over the other. We certainly had opinions. We have strong opinions, and they're pretty valid based on our experience, but that's not that kind of decision that we want to be known for making. We'd rather advise somebody on how they should approach accomplishing those goals and then let a development vendor decide on what platform to use.

Emily Lewis: [Agrees]

Lea Alcantara: Like ourselves. [Laughs]

Emily Lewis: [Laughs]

J. Cornelius: Like you, exactly.



Emily Lewis: You know, Lea, with what J just described, it occurs to me we actually are doing what J is doing just in a different way. I don't think we are perceiving them as this sort of initial or discovery types of engagements, but we do have buckets. We have like a performance bucket where we audit their site and take a look at the CMS and the front end and see what's happening from a performance perspective and give them recommendations on what can happen and what that would take in terms of time and money. The same thing with just a CMS look, an audit of the CMS, we're not viewing those as discovery engagements, but essentially that's what they are.

Lea Alcantara: Right, right.

J. Cornelius: Yeah.

Lea Alcantara: We're doing research over what's the problem here and how do we fix it.

Emily Lewis: Exactly.

J. Cornelius: And are you being paid to do this?

Emily Lewis: Yes, yes.

J. Cornelius: Yes.

Emily Lewis: We're being paid to do them. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: We're paid. [Laughs]

J. Cornelius: Yeah. And that's the big distinction.

Lea Alcantara: Right.



J. Cornelius: The people who are running their own shops who are listening to this can take away nothing else is to don't give away your expertise for free.

Emily Lewis: [Agrees]

J. Cornelius: It's cool to do like a 20-minute call to kind of screen and see if the client sounds like somebody that you want to work with, and if you feel that you're going to actually do good work for them, that's fine, but don't do a two-hour freebie and give them answers, because there's a distinct value to what you do, and I think that one of the things, I was actually just having this conversation last week with a guy who runs a UX shop in Dallas, and one of the things that our industry has not yet caught on to is, and this is really just a matter of the age of our industry, we're still too young to really figure it out, is that there's no kind of standards for how we approach going through about business.

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Lea Alcantara: Right.

J. Cornelius: So when you go and you talk to one consulting shop or a design shop, you get one answer. When you go to talk to their competitor, you get a wildly different answer. And so for the client to make a decision on which direction to go, it's enormously difficult.

Emily Lewis: [Agrees]

J. Cornelius: So imagine if you were trying to build a custom home and you took the same set of plans of different builders and they gave wildly different approaches and wildly different prices, then you'd have no basis to make a good decision.

Emily Lewis: Right.



J. Cornelius: I think one of the advantages that we as an industry could have, if we chose to do it, is just kind of standardize the way we go about doing our business and just tell people, “There are two ways to do it, we either bill on a project basis or we bill on time and materials, and that’s it.”

Emily Lewis: [Agrees]

J. Cornelius: And there’s no ambiguity around it, right?

Emily Lewis: [Agrees] You know, you mentioned at the beginning of your discussion about where the pricing and the standards fall. You shouldn’t be spending too much time giving away your expertise for free, essentially too much time on the sales process. I’m curious where the line is, and you said 20 minutes. I’m guessing that’s just sort of a general point, but I know Lea and I tend to spend too much time on sales, and where do you say, “Okay, this is enough. It’s time for you to either engage us for something or walk away.”

J. Cornelius: Yeah. And that’s another place where these discovery projects can be helpful. It’s because it gives them kind of a small chunk to commit to you and they don’t feel like they’re committing to a six-figure project when they don’t need to.

Lea Alcantara: Right.

J. Cornelius: So that’s another way that this can be a good sales tool, and it’s also good for the clients, because they get a definitive outcome for a definitive price, and it enables them to make a better decision about what to do for the rest of the project. So in a way, this thing really helps both sides by taking a step in, checking the temperature of the pool before you just jump in head first.

Emily Lewis: [Agrees]



J. Cornelius: So it's good as a sales tool, but it's also good as a risk mitigator for the client.

Lea Alcantara: Right, right. I feel this really leads well to an audience question we got. Our friend, Chris Harrison kind of asks, and I feel like this sounds so great because I feel whatever you're saying, we're like nodding our head, but the real question is, which Chris asks is, "How difficult has it been to get buy in from potential clients for discovery-only projects? And has discovery-only projects generally lead to additional work?"

J. Cornelius: So the first question, how difficult is it to get buy in? This is kind of anecdotal because I don't have any real hard data on it, but it's easier for someone to commit to something small than it is for them to commit to something large, and there's a bit of kind of having to pay close attention to what the client is asking for to gauge whether or not a discovery is the best choice or whether just to go ahead and give them a full proposal. Sometimes that's the right decision.

Lea Alcantara: Oh, right.

J. Cornelius: It's to say, "You know what, you guys are just ready to go so here's the whole thing." Sometimes that's the best choice, and then you can always dial that back to a discovery if they have sticker shock. In terms of does it lead to more work, 85 to 90% of the time it does.

Emily Lewis: [Agrees]

Lea Alcantara: [Agrees]

J. Cornelius: Because at that point, you developed a working relationship and if you like each other and you agree on what the next step is for the project, it's very easy for them to say, "Yeah, let's go ahead and do it." The times when it has not led to more work from that client in the short term has



typically been because we've discovered, as a result of that little workshop session, that they're barking at the wrong tree.

Emily Lewis: [Agrees]

J. Cornelius: Or that the budget to accomplish what they want to accomplish is far more than they can allocate to the project. So it's just been kind of a no-brainer decision. It's like, "Well, guys, we could do this, but it's probably not the best use of your money, so let's think about another way to do it."

Emily Lewis: [Agrees]

J. Cornelius: And those people, well, we've had instances where they disappeared and we never heard from them again. We've had instances where they come back three months later with a different plan and they want to attack it in a different way, and in a way that they can get budget for.

Emily Lewis: [Agrees]

Lea Alcantara: Right.

J. Cornelius: So I think in both cases, at least in my experience, there's no downside to at least having the discovery project as an option and leading with that option.

Emily Lewis: Right.

J. Cornelius: And if people say, "No, that's not really for me. We just want to go ahead and build the app. Can you give me a quote?" I'm just like, "Yeah, sure. That's going to be \$180,000, and that's going to take six months. There's the quote."

Emily Lewis: [Agrees]



J. Cornelius: They're like, "Oh, whoa, hold on a second. That's too much." I'm like, "Cool. Let's just do the discovery and make sure that quote is accurate."

Emily Lewis: [Agrees]

Lea Alcantara: Right.

Emily Lewis: Well, let's talk a little bit about this process of selling the discovery-only project. What you were just describing as some of the conversations you're having with a lead, but something you mentioned earlier on in our discussion was that you have something you send to someone in an email, "You know, check this out, we think this might work for you."

J. Cornelius: Yeah.

Emily Lewis: Is that something that you've developed over time or that was something you started with in order to sell the discovery-only project?

J. Cornelius: No, it's something that's developed over time. In terms of the different types of projects, the little assets that we send to people that could give them an overview of what happens and what to expect, those have developed over time as we've identified more topics or subject areas for which we should have a discovery-style project. It started with the very basic, "Hey, let's do a half-day or full-day or two days to scope whatever it is that you want," and there's still that, but just kind of the generic catch-all for projects that we don't have a specific track for.

But as we've seen, some companies or clients have very similar needs, which is, "Well, this is the third time this has come up. Let's just go ahead and create a thing that outlines what we would do in this instance, and now we have this predefined process that we can follow." So that's been something that's kind of matured over time.



Emily Lewis: [Agrees]

J. Cornelius: And there have been other times where we've had several clients who have had similar needs, but it doesn't fit into something you can pre-describe, so that doesn't get defined and that isn't a specific workshop that we can sell.

Emily Lewis: So these materials that you'd put together, did they contribute to reducing the amount of time you spent in the sales process?

J. Cornelius: Oh, absolutely.

Emily Lewis: Because I think that's one of the things that Lea and I are really trying to shift on right now.

Lea Alcantara: [Agrees]

Emily Lewis: We're like in the middle of it, and it's trying to cut back on our sales process by boosting resources we can share rather than spend a lot of time on the phone trying to educate someone. Is that kind of the tact you've taken with your materials?

J. Cornelius: It is. There are a couple of aspects to that. One, I think that, at least, for the clients that we've talked to or the people that I end up talking to most, they're busy people.

Emily Lewis: [Agrees]

Lea Alcantara: Right.

J. Cornelius: And to keep them on the phone for an hour, I mean, that's not to say that it's a waste of time, because it isn't, but it might not be the best possible use of their time or yours. I think about myself, and if somebody sends me something, I'm likely to review it like when I'm sitting at home and



reviewing my email at night, or maybe I'm waiting on the doctor's office or I'm waiting for another appointment or whatever it might be, so I want to be able to have the information at my disposal at the time that it's convenient for me to consume it.

Emily Lewis: [Agrees]

J. Cornelius: And I feel that a lot of people that we talk to, a lot of the executives and decision makers that we end up dealing with are in the same situation. So by having a document we can send to them and saying, "Here's the overview. Here's how it works. Take a look at it. If you have questions, let me know. I'm happy to hop on a call to get your questions answered. Let's set a time next week to go over what next steps look like."

Emily Lewis: [Agrees]

J. Cornelius: I think that is respectful of their time and it gives them the information that they need to make a decision, and it keeps the door open that if there are something that they are still unclear on, that they can certainly call or email you at any time.

Emily Lewis: Right.

J. Cornelius: Yeah.

Emily Lewis: And then from just a business efficiency standpoint, you have a single asset that you can use for an infinite number of leads.

J. Cornelius: Exactly. And not just from the sales process, you see efficiency gains in the execution of that as well, because now there's a protocol to follow. So Customer X signs up for one of the



workshops. Well, now, I'll just send the message to the time and I say, "Customer X just bought the Marketing Kick-Start."

Emily Lewis: Exactly.

J. Cornelius: So now the team knows what to do. They know what welcome email to send. They know how to schedule the meetings. They know what to ask the client for. Like everything is in place and we will just kind of follow that protocol. For the UX piece, it's typically a little bit higher maintenance because they require so much interaction with the client and potentially requires a lot of interaction on the research side with the users of that product. So that process is still prescribed, but there aren't as many steps.

Emily Lewis: [Agrees]

J. Cornelius: But basically, let's do the recruiting email, send out to enough people to get us users to test with, and once we do the research phase is complete, we generate the report, and at that point, we get back with the client and move on. But the thing is, both processes are defined, so it makes it easy for the team because they know what to expect, they know what's expected of them, and it's easy to communicate with the client and set the expectation on what we're going to do and when we're going to do it and how we are going to do it.

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Emily Lewis: I feel like this is a really important point to underscore, especially for smaller agencies or agencies with limited resources and time. Lea and I, only this year, have really realized the importance of us investing the time in these kind of materials, and it's completely worth it. For exactly the things you were just describing, J, not only are you creating materials that can support sales



processes, but you're also creating materials that support your internal processes in team project management, everything.

J. Cornelius: Yeah.

Emily Lewis: Lea and I, we're literally like in the middle of like the biggest log to get this stuff done.
[Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: We are just trying to crank out a lot of materials, not in a rapid fashion, but in a very intentional focused fashion, and it's taking a lot of time, but each time we finish a material that we can use in our sales process, it's completely worth it.

Lea Alcantara: Oh, totally.

Emily Lewis: It saves time in the long run, and I now have the hindsight that I wish we had figured this out sooner.

J. Cornelius: Yeah, yeah. If I could hold up an example of something that I feel that you've done well is the prep for this podcast. You have all the steps outlined so we know exactly what's going to happen, when it's going to happen, what's expected of me, what you're going to do. It's a predefined process that works, and you've answered all the questions, like it makes it super easy for me to come on and say, "Okay, I know what I need to do. I know when I need to do it." And that type of pre-describing things or creating a protocol, anytime you can do that in your business, you're going to see efficiency gains, which usually leads to the bottom line.

Emily Lewis: Right.



<http://ctrlclickcast.com/episodes/discovery-only>

Lea Alcantara: Absolutely. So I'm a little bit curious about pricing all these discovery-only projects. So you mentioned your 14 items. Do each workshop have a fixed price and you just say, "Okay, with this particular project, we're going to do these two particular workshops. It's going to be workshop plus other workshop and then that's total cost." Or is there any variation?

J. Cornelius: The only variation is on the Know-Your-Customer workshop because it has three components to it. There are two days with the client and there's the research phase in between. So the research phase is something that we typically have to do with most of our projects anyway, so having it upfront, we actually don't charge as much as we might normally charge for that in conjunction with those other two workshops. But I'm certainly open about our pricing.

We charge what's basically a day rate at \$7,200 for each of those workshops. It's the same price no matter which workshop you do. That way if somebody knows that, "Okay, well, let's do this one and then we can do this other one later, so let's start with persona development, and then let's move to maybe the brand audit," all of those things come with that same price tag, the same timeline, same kind of expectations on what you're going to get from us.

Emily Lewis: [Agrees]

J. Cornelius: So it makes it easy for us to know what we're selling, and it's easy for the client to understand.

Emily Lewis: Absolutely. It makes it easy for them to budget and plan as well.

J. Cornelius: Exactly.



Emily Lewis: We're making some changes to the house and I'm gathering estimates and trying to not only plan what we're going to spend now, but what we might spend next year, and so having all of those numbers really helps me choose a vendor.

J. Cornelius: Yeah, right.

Emily Lewis: So before we wrap up, let's just talk a little bit about what you do at Nine Labs after Discovery Only. So you've done one of these engagements. What happens next?

J. Cornelius: That depends on the outcome of the engagement, but usually we have a project plan that's got a budget, that's got a timeline, it's got a scope of what's going to be accomplished. So we document that, we share it with the client. We have a discussion about it so the client understands what they can expect from us and get their questions answered, and then it's just a matter of whether or not they decide to do it. If they do, then we start that project process. If they don't, then we say, "Okay, that's cool. Let us know if there's something we can help you with in the future," and we just follow up with them periodically to stay in contact. In terms of execution, it really comes down to what's in the scope of that next larger project.

Lea Alcantara: Right.

J. Cornelius: Yeah, that could be doing a bunch of wireframes and prototypes for a mobile app. It could be working on voice and tone documents.

Emily Lewis: Right.

J. Cornelius: It could be a number of things.



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Lea Alcantara: Very cool, so any final advice for our listeners when they approach a discovery-only project?

J. Cornelius: Don't over promise. Yeah, I think it's really easy to overestimate what you can accomplish in a single day. A lot of times what happens is people forget, like we as practitioners forget that we have mountains of knowledge that are new and not familiar to the client.

Emily Lewis: [Agrees]

J. Cornelius: That we have lots of terminologies that we might need to explain, that we have to take them into this process kind of slowly. I find that it helps me to draw a metaphor of going to the doctor and they tell me that my metacarpal has – whatever, you know?

Emily Lewis: [Laughs]

Lea Alcantara: [Laughs]

J. Cornelius: They have all these terminologies that I don't know. I didn't go to med school. So a good doctor will take the time to explain things to you. So it's very, very important to not try to cram too much into that one day. Not to say, "Oh, look, we're going to do this exercise and that exercise and we're going to have white board and we're going to do some wireframes." No, you're not. You only have effectively one of these things. If you book it for the entire day, you only have six hours together that you're actually working.

Emily Lewis: [Agrees]

J. Cornelius: There are a lot of the niceties of, "Oh, how many kids you have? And where do you go to school," and all that kind of crap. And you need that, I mean, that's important to understand the



perspective of the person on the other side of the table, but real work time is pretty limited, so just scope appropriately and try to minimize what it is that you're going to accomplish and be very clear about what that deliverable is and charge accordingly. Don't undersell yourself.

Lea Alcantara: Awesome. Well, thanks, J, but before we finish up, we've got our Rapid Fire Ten Questions...

J. Cornelius: Oh, boy.

Lea Alcantara: So our listeners can get to know you a bit better.

J. Cornelius: All right.

Lea Alcantara: Are you ready?

J. Cornelius: I am as ready as I'm going to get.

Lea Alcantara: Okay. First question, morning person or night owl?

J. Cornelius: Night owl.

Emily Lewis: What's one of your guilty pleasures?

J. Cornelius: Guilty pleasures, raspberry chocolate sorbet.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Lea Alcantara: What software could you not live without?

J. Cornelius: OS X.



Emily Lewis: What profession other than your own would you like to try?

J. Cornelius: Race car driver.

Emily Lewis: [Laughs]

Lea Alcantara: What profession would you not like to try?

J. Cornelius: Those people that climb up to the top of towers to change light bulbs.

Lea Alcantara: Oh-oh.

Emily Lewis: [Laughs] If you could take us to one restaurant in your town, where would we go?

J. Cornelius: [Bones](#) [Restaurant].

Emily Lewis: What kind of food is that, barbecue?

J. Cornelius: It's a steakhouse.

Emily Lewis: Yeah.

Lea Alcantara: Oh, boom, yum.

Emily Lewis: [Laughs]

Lea Alcantara: If you can meet someone famous, living or dead, who would it be?

J. Cornelius: [Umair Haque](#).

Emily Lewis: If you could have a super power, what it would be?

J. Cornelius: That one would be – I don't know. I kind of want to say mind control, but I'd rather not control minds rather than just be able to know what people are thinking.



Lea Alcantara: What is your favorite band or musician?

J. Cornelius: So this one is really tough for me because I spent so much time in the music business and I respect so many different people. I think that one of the most talented bands, and it's going to sound kind of cliché, but The Beatles.

Emily Lewis: [Agrees]

Lea Alcantara: [Agrees]

J. Cornelius: They did so much in so many different ways and they're so talented. People I enjoy listening to most are pretty broad. The next band just might be [TOOL](#).

Emily Lewis: [Agrees]

J. Cornelius: It might be [Ahmad Jamal](#). It could be – I don't know, there are so many.

Emily Lewis: It's like asking Lea and I what our favorite food is. [Laughs]

Lea Alcantara: [Laughs]

J. Cornelius: Yeah, there are just so many. Too many to choose from.

Emily Lewis: All right, last question, pancakes or waffles?

J. Cornelius: Can I go with crepes?

Emily Lewis: [Laughs]

Lea Alcantara: Oh, I love it.

Emily Lewis: Sure. [Laughs]



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Lea Alcantara: I love it. I think you're the first crepe.

J. Cornelius: Yeah, I like making them.

Emily Lewis: [Laughs]

Lea Alcantara: So that's all we have time for today. Thanks for joining the show, J.

J. Cornelius: You're very welcome. Thanks for having me.

Emily Lewis: In case our listeners want to follow up with you, where can they find you online?

J. Cornelius: The company is at ninelabs.com. You can find me at jcornelius.com. I'm on Twitter [@jc](https://twitter.com/jc). From there you should be able to find anything else you need.

Emily Lewis: Great. Thanks again for joining us today. I think this was a really great discussion.

J. Cornelius: I'm glad you enjoyed it. I certainly did.

[Music starts]

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Emily Lewis: Don't forget to tune in to our next episode when Lea and I talk about copywriting and the user experience with Stephanie Morillo.

Lea Alcantara: This is Lea Alcantara ...

Emily Lewis: And Emily Lewis ...

Lea Alcantara: Signing off for CTRL+CLICK CAST. See you next time!

Emily Lewis: Cheers!

[Music stops]

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