



Tool 3

Opportunity Brief

An **opportunity brief** summarizes the findings and synthesis of your initial customer research to present a case for next-phase research and development. This next phase typically involves prototyping and testing within the opportunity areas you identify. To make a compelling case for decision-makers to invest in your customer experience project, you must combine qualitative customer insights, needs, and observations with information about market opportunities and sizing.

STEPS

1

HUMAN INSIGHTS

Present key user needs and pain points discovered in your initial research phase. Include documentation such as pictures, personal anecdotes, and personas of those you interviewed. See [Tool 1: Persona Profile](#) (page 6) to learn more about capturing human insights.

2

MARKET INSIGHTS

Include any findings about market opportunities that overlap with the user needs you discovered. Include competitor stories and market analogs that illustrate unmet market needs.

3

INTERNAL CAPABILITIES

Illustrate capabilities required to further explore the opportunity space. Which current offerings overlap, and what capabilities (such as external partnerships) need to come from the outside?

4

OPPORTUNITY SIZING

To further strengthen the case for your opportunity, compile any quantitative metrics that help size it. Examples include market size and segmentation or average household size.

SUGGESTED TIME

2-8 hours

ROLES

2-4 collaborators

MATERIALS NEEDED

template, pages 22-29
pens
paper
sticky notes

Depending on the scope and budget of your project, an opportunity brief can be an extensive document with a very high level of detail. The tool here presents a simplified template that captures basic elements.



References: Prioritization Tools Selected methods from The DIY Toolkit (Nesta), Insights Into Action (CGAP).

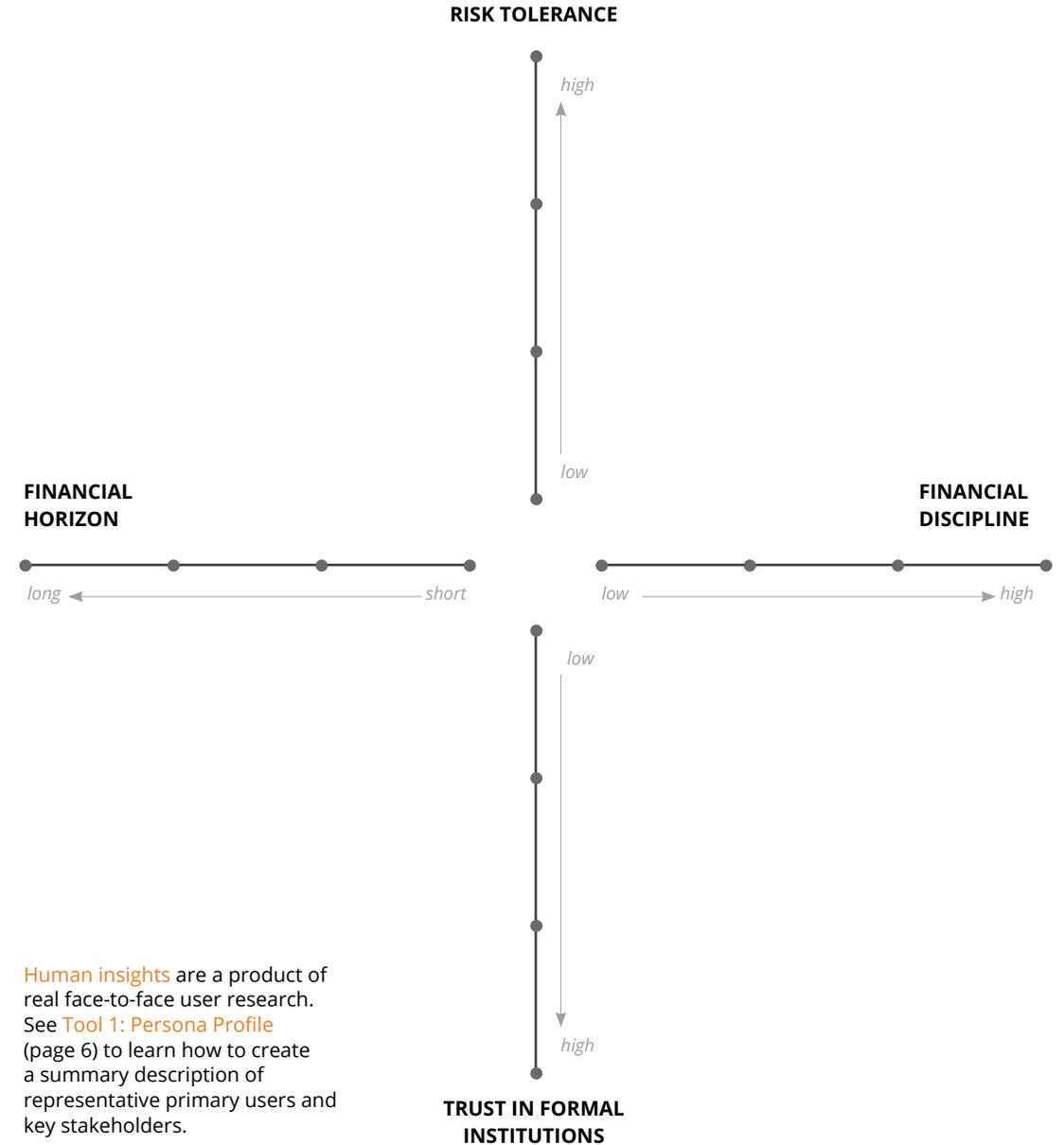


Tool 3

Opportunity Brief (1/4: human insights)

[FINANCIAL] BEHAVIORAL INSIGHTS Summarize insights about behaviors you observed in your customers' financial practices. Which habits and rituals are performed on a regular basis vs. single behaviors that result from external pressures?

MOTIVATIONAL INSIGHTS Summarize the needs, enablers, and blockers that influence your customers. Who are the influential stakeholders in their lives?





Tool 3

Opportunity Brief (2/4: market insights)

UNMET MARKET NEEDS

Map the human needs you identified in your primary research onto gaps in your organizational offerings (and offerings of your competitors). Highlight areas with the most potential.

Opportunity areas should reflect an unmet human need as well as a market opportunity. You may identify several opportunity areas to include in your brief, and your next round of research should allow several rounds to prototype and test those areas.

HUMAN NEED As identified in your primary research

ORGANIZATIONAL GAPS Look at existing products and services within your organization

COMPETITIVE GAPS Look at market analogs, as well as competitors

OPPORTUNITY AREAS What opportunity areas have you identified?

	→	→
	→	→
	→	→
	→	→

	→
	→
	→
	→



Tool 3

Opportunity Brief (3/4: internal capabilities)

CURRENT PRODUCT AND SERVICE OFFERINGS Which existing products or services offered by your organization solve customer needs similar to those identified in your research? Where do they succeed? How do they fall short?

CURRENT PORTFOLIO SIZE How much does your organization already invest in the sector(s) you identified in your opportunity areas?

CUSTOMER MAKEUP How many of your current customers are signed up for products or services within the sector, or with products and services that address similar needs to those you've identified?

ON DECK Which new pilots or opportunity areas are you currently investigating? Is there overlap with the opportunity areas you wish to explore further?



Tool 3

Opportunity Brief (4/4: opportunity sizing)

<p>CUSTOMERS BY THE NUMBERS Include customer metrics to help define your segment.</p>	<p>e.g., average household size in target country</p>	<p>e.g., percent of residents who have savings</p>
--	---	--

<p>e.g., percent of residents who've taken out loans</p>	<p>e.g., average cost of existing products or services</p>	<p>e.g., percent of income spent on comparable products and services</p>
--	--	--

<p>REGIONAL MARKET Include market sizing data where possible.</p>	<p>e.g., nationwide total market potential per year [\$]</p>	<p>e.g., total addressable market potential (considering demand) [\$]</p>
--	--	---

<p>e.g., primary segment addressable market potential [\$]</p>	<p>e.g., total segment addressable market potential (including secondary segments) [\$]</p>	<p>e.g., expected share of addressable market [\$]</p>
--	---	--