

THE CLIENT INTELLIGENCE BLUEPRINT: FROM INSIGHTS TO RESULTS



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In order to deliver the most value to someone, you need to know an awful lot about them!

“ Everyone talks about how disruptive technology is but. I believe that **the customer** is really the disruptive force.

TIFFANI BOVA Global Customer Growth & Innovation, Salesforce

WHAT IS THE PURPOSE OF YOUR STUDY?

- + Brand perceptions
- + Customer insight
- + Customer satisfaction/service
- + Product or service development

HOW WOULD YOU OBTAIN INFORMATION?

- + Public profiles (people and companies)
- + Observation and listening tools, analytics
- + Surveys, focus groups, client feedback, user testing
- + One-on-one interviews

QUANTITATIVE RESEARCH

- + Your owned digital channels
- + Social listening and engagement data
- + Industry and market benchmarks

OWNED CHANNELS

GA4, Search Console

CRM

HubSpot or similar

LinkedIn Analytics

SOCIAL LISTENING

Sprout Social

Meltwater

Brandwatch

Hootsuite

MARKET RESEARCH











Dun & Bradstreet,
ZoomInfo

McKenzie, Pew, BCG
Gartner, Deloitte

ENR, PSMJ, SMPS, Zweig

JLL, CBRE

SparkToro

What you'll get	How to use it
 High affinity websites and sources of influence for your audience	 Invest in the right channels & sources of influence
 Keywords your audiences searches for in Google/Bing	 Get a competitive advantage for SEO & content marketing
 Social networks your audience uses more/less than avg	 Optimize your social media strategy & activities
 Demographics - age, gender, job titles, skills, & more	 Build smarter personas and more-targeted campaigns
 YouTube channels, podcasts, & subreddits your audience follows	 Target ads, pitch partnerships, earn guest spots, & more



“ Analytics show **what** is happening, qualitative research aims to determine the **why**.

MELISSA EGGLESTON Director of UX, Teamworks



Male

Born in 1948

Grew up in England

Married for the second time

Vacations in the Alps

Wealthy

Likes Dogs

Charles III, King of England

Male

Born in 1948

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Vacations in the Alps

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Ozzy Osbourne, Rock and Roll Hall of Fame

IDEAL CLIENT

MOST LIKABLE

MOST PROFITABLE

**ALIGNMENT
OF VALUES**

**REWARDING
WORK**

LOYAL



**GROWTH
POTENTIAL**

**ADEQUATE
BUDGET**

**LOW
MAINTENANCE**

PERSONA DEVELOPMENT

- + Type of organization, role, job responsibilities
- + Goals, challenges and fears
- + Incentives, motivators, success metrics
- + Personal values
- + Day in the life
- + Trusted sources of information and content
- + Communication channel preference



WHO HAS THE INSIGHT YOU NEED?

YOU WANT TO UNCOVER:

TALK TO:

Current perceptions

Current and past customers and prospects

Industry Trends

Change makers and those responsible for setting the future vision

How to Attract New Customers

Non-customers using your services in your industry

Blue Ocean Strategies

Non-customers using your services in industries related to yours

End User Needs

People who use your services (if different from primary decision makers or direct customers)

HOW MANY INTERVIEWEES DOES IT TAKE TO GET INSIGHT?

Your ideal number of interviews $\times 2$ = the number of asks you'll need to make to hit your target number within a reasonable timeframe.

THE IDEAL INTERVIEWEE

- + Willing, interested and eager to talk
- + Love telling stories and sharing examples
- + Represent the **ideal** customers
- + Forward thinking and open
- + Familiar with your types of services and how those are identified and selected

THE IDEAL INTERVIEWER

- + Fully understands your research goal, knows how data will be used and an expert in the area of your research
- + Unafraid to go off script and ask follow-up questions that lead to deeper insight
- + Is endlessly curious and loves picking people's brains
- + Is a great listener

ASKING THE RIGHT QUESTIONS

- + Open-ended (cannot be answered with Y/N)
- + Short and simple
- + Non-leading
- + Asked using customer's language
- + Focused on your customer

AI-AIDED ANALYSIS

Prompt Example:

I will paste interview transcripts from [type of study / goals]. First, [analyze each interview separately]. Then [summarize the key goals, challenges, buying triggers and exact phrases clients use in these interviews]. Base your analysis only on the text I provide and do not add any information that is not explicitly in the transcripts.

AI-AIDED PERSONA DEVELOPMENT

- + Upload existing ICPs/personas, research and customer data as a starting point
- + Upload LinkedIn profiles
- + Prompt for additional information
- + Save and reference in the future

WHAT'S NEXT? FROM INSIGHT TO ACTION.

Knowledge without action does not equal result.

HOW TO USE CUSTOMER RESEARCH DATA

- + Sharpen brand positioning
- + Refine value proposition(s)
- + Improve marketing and content strategy
- + Personalize content and experience
- + Increase business development effectiveness

“ Get closer to your customers than ever.
So close that you can tell them what they
need before they realize it themselves.

STEVE JOBS Co-Founder, Apple



QUESTIONS?

SLIDES AND RESOURCES

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