



Action Plan

Customer insights help you better understand the behavior, preferences and needs of your core customers. Use the ideas below to develop a game plan for implementing best practices and using what you've learned to inform your business strategies.

Core customer

Best Practice	 Action Steps	Frequency
Conduct regular customer feedback reviews to stay informed	Gather direct feedback right from your customers to test your assumptions <hr/> Encourage your sales team to share customer feedback often <hr/> Review how your customers engage with your social media (likes, comments) and conduct polls to gain new insights	
Use analysis to dig deeper and understand the “whys” of what your customers and non-customers are saying, thinking and feeling	Interview at least 6 participants who you think best represent your target audience <ul style="list-style-type: none"> • Find participants from mailing lists, newsletter lists, patient lists, POS data, etc. • Incentivize participation (e.g., with coupon), if necessary • Prepare open-ended questions with clear objectives • Schedule interviews within a set time frame (e.g., a one-week period) <hr/> After the interviews, synthesize and incorporate the feedback you heard and insights into your marketing efforts: <ul style="list-style-type: none"> • Use actual customer testimonials in website copy, marketing materials • Refine product copy and messaging to reflect what you learned • Use your new insights to inform content ideas for blog and social media posts 	
Monitor website and social media analytics regularly to understand customer segments and market effectively	Monitor social media and website traffic to gain insights into your customer base (e.g., gender, age, location) and examine the most active days / times of day <hr/> Track the most highly visited pages within your business site to see what customers/ potential customers find most interesting <hr/> Enhance your marketing strategy by using your observations to thoughtfully and deliberately reach specific customer segments	



Product and Pricing

Best Practice	✔ Action Steps	Frequency
Review point-of-sale and credit card data to uncover valuable purchase trends and behavior	Use what you learn from purchase behavior patterns to acquire new customers (e.g., understand seasonal interests, distinguish ideal times in the purchase cycle to market to customers)	
	Review spending per transaction and identify your most valuable customers (e.g., which segment of customers has the highest conversion rate?)	
	Study heavy users or lapsed users and market targeted offers accordingly	
	Investigate slowdown in sales and research drivers (e.g., customer drop-off, impact of competitive marketing)	
Use research to quantify purchase drivers and barriers, attitudes, behaviors, demand or preferences	Send your customers a short survey (e.g., through SurveyMonkey) <ul style="list-style-type: none"> • Draft short, clear questions to elicit instinctual responses • Keep surveys to 8 questions or fewer to encourage higher completion rates • Offer response options along a 5- to 7-point scale (e.g., strongly agree to strongly disagree) to allow for more in-depth insights rather than yes/no answers • Consider offering a small incentive for participation 	

Competitive Differentiator

Best Practice	✔ Action Steps	Frequency
Conduct a regular review of your competitive landscape to understand your positioning vs. competition	Update a competitive analysis grid to assess your business vs. your direct competitors <ul style="list-style-type: none"> • Evaluate your positioning, price, product and sales channels • Monitor the marketing tactics your competitors use, along with new entrants to the market (e.g., new competitors from a geographic or industry perspective) 	

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