

CUSTOMER DRIVEN

HOW TO USE DEEP CUSTOMER INTELLIGENCE
TO CREATE SUPERIOR PRODUCTS, SERVICES AND
MARKETING STRATEGIES



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Introduction

Why perfectly good products and marketing fail

You've done all the work.

You created a great customer avatar. You've conducted surveys and focus groups to determine what people want and would likely buy. Participated in groups on Facebook and LinkedIn to gather even more intelligence about what your customers want.

You put together a great package and tempting offer. The main product consists of 34 to-the-point videos. Four bonus reports. A complete set of done-for-you templates. For extra measure, you've added a social media support group.

To top it all off, you're offering a specially discounted price, good for three days only, to trigger a powerful sense of urgency and motivate as many people as possible to buy now.

Next, you hired one of the best copywriters in your industry to create the launch emails, landing page, and a sales video script. Then you had a top video team record, edit, and polish your video to perfection.

And now the big day has come.

At exactly 6:00 am, the first email in your launch sequence is fired off. This is followed by four more days of emails designed to build maximum momentum until you finally arrive at the cart open day.

Once your cart has officially opened, you sit back with eager anticipation and wait for the inevitable flood of orders to begin pounding your server. In fact, you're a bit nervous, hoping your server will be able to handle all the activity.

At 8:00 am, you go to your shopping cart dashboard to get your first view of your orders.

As you view your initial results, you get a sick feeling in your stomach that something must be wrong.

Very wrong.

You were expecting to have 60 to 70 orders by now, but there are just 9 orders showing on your dashboard.

You check the stats on your email client to make sure the cart open email was sent to your entire list. The stats confirm that it definitely was.

You then check your open rate and it's hovering around 16%. Pretty decent and exactly what you expected.

Upon checking your click-through rate, you see that it's clocking in at a solid 7%. This also hits the mark you had expected.

So while you did everything right and your stats look strong... *your sales are lousy.*

How did things go so wrong?

The example above is all too real. It happens every day to good companies with great products.

You devote full effort to all areas of creating a great product or service, create solid marketing and a great offer, yet your sales fizzle. Or fail completely.

So where did you go wrong?

The problem is not that companies aren't trying to create great new products, services, and marketing. Most companies devote substantial amounts of time to these areas, as I'm sure you do.

The real problem is the lens that companies view product and marketing creation through. In practical terms, it can be summed up this way:

Companies are *feature and benefit oriented*

while...

Customers are *experience oriented*

Companies are analytical when creating new products. They look at adding new features and functions they believe their customers will like in order to create a solid product. At the same time, their analysis relies heavily on doing this in the most cost-effective way.

Then they focus their marketing on the benefits that product (or service) offers and creating as much urgency as possible to get their prospects to place their order right now.

Sound familiar?

If you're honest in your assessment of how you go about developing new products and the marketing for them, what I've just described should be right on target.

But that is not how customers think about a product. And that is not what attracts a prospect to consider your product in the first place. And it certainly is not which aspects of your marketing ultimately get your prospect to pull out their credit card and place their order.

Most importantly, this applies to any product or service and its marketing – yours, mine or your competitors.

Now, on the other hand...

Customers don't think about your product, or your marketing, the same way that you do. Not even close.

In the real world that customers live in, the consideration of any product or service starts with a situation your customer is *experiencing*.

Most often, this is some form of pain, frustration, or a problem they desperately want to eliminate. But it can also be a goal they've set that they're eager to achieve.

So here's THE critical point to burn into your brain:

*The purchase of any product or service always starts
with the exact situation your customer is experiencing*

If you neglect understanding this and acting on it, then any effort to develop products or services, and any effort to create effective marketing, is severely compromised.

What happens next... in the real world of your customer

Next, let's say that your prospect actually buys your product. Their journey, and how it directly affects your future sales, isn't over yet.

As they begin to use your product, the next level of *experience* kicks in. As a customer uses your product, they directly *experience* the use of it in their everyday life.

That experience may be good or it may be bad. But this brings us to another critical point:

*Experiencing the use of a product or service is entirely different
than creating that product or service in a series of planning meetings*

If the *experience* your customer has in using your product doesn't meet their expectations – and more importantly doesn't fulfill what you promised – no amount of marketing or glowing testimonials can overcome this.

Instead, you'll be faced with a high level of refund requests and returns. And in this age of instant sharing across all social media platforms, the resulting bad reviews will further tank your sales.

So in order to create the kind of products and services your customers will use, value the most, recommend to others and continue to buy, you need to create products and services that give your customers a *superior experience*.

And the direct corollary to this is that in order to create effective marketing, it must focus on and prove without a shadow of a doubt that your product will deliver the type of experience needed to make certain your customer eliminates their problem or achieves their goal.

A glimpse at a different way to create high-value products, services, and marketing

A quick note on terminology. This material is designed to help you create superior products and services and the marketing for them. However, continuously repeating the phrase “products and services” gets cumbersome and makes sentences feel awkward. So for the remainder of this material, whenever you see the word “product”, please know that it means “products and services”.

Now, back to the material :-).

When you create products the conventional way, you overlook the critical factor of *customer experience*. And without understanding all aspects of what your customer experiences – before buying your product, while making the decision to buy your product, and while using your product – you can't possibly create the most effective marketing and far more successful products.

In just a minute, I'm going to show you how the **Customer Driven Framework** employs three unique mechanisms to get a complete, 360-degree understanding of everything your customer actually experiences. All the factors that lead them to consider buying your product in the first place... all the factors that makes your marketing connect with your prospects on the deepest level possible... and all the factors that make the use of your product a ringing success.

But before we get to that, let me share a few real-world examples that illustrate just how valuable developing your products and marketing based on your customers' actual experience can be.

The immense value of a Customer Driven product **...Hey, mind if I crash on your couch?**

Airbnb created a new form of property rentals the world has never seen. But what many people don't know is that it was based on the real-life experience of a small community of graphic artists.

Living in San Francisco and working as graphic artists, Airbnb's founders realized there was a problem for a large number of other working graphic artists who continually visit the city. Renting a hotel room was expensive, and even more so during business conferences when hotel space was sparse and sold at premium prices. As a consequence, many graphic artists chose not to visit San Francisco and certainly not attend important conferences, due to the lack of rooms at reasonable rates.

This negative experience these limitations caused resulted in the concept for Airbnb, which was created by one of its founders, Joe Gebbia, sending his roommate this email:

"I thought of a way to make a few bucks – turning our place into 'designers bed and breakfast' – offering young designers who come into town a place to crash during the 4 day event, complete with wireless internet, a small desk space, sleeping mat, and breakfast each morning. Ha!"

No one ever thought this simple idea would become a major threat to hotels all over the world. But the concept grew quickly and soon people were registering in droves to rent out their house, apartment, a room in their house or apartment – or even a couch in their house or apartment!

So what were Airbnb's customers really getting?

They were no longer just renting a room.

Instead, they were renting a *better experience*.

In place of cold hotel lobbies and over-inflated prices, customers were now getting a warmer, home-like atmosphere and a full range of amenities at a fraction of the cost of expensive hotels.

As a result of improving their customers' experience, Airbnb is now valued at \$88 billion.

How a Customer Driven marketing strategy increased profits by 714%

Now, let's take a look at how deep customer intelligence was the driving force behind the creation of an extremely successful marketing strategy.

This strategy was created for a company that offers training programs to insurance agents on more effective prospecting and marketing techniques. Owned by financial services expert and New York Times best-selling author, Pamela Yellen, the company is called the Prospecting & Marketing Institute, Inc.

Pamela approached me with a unique problem. She had a very successful program that was guaranteed to increase an insurance agent's income by a minimum of \$40,000 annually. Priced at just \$600 and requiring a substantial amount of hands-on customer support for each agent, Pamela felt that the fee didn't match the value of the program.

She rightfully wanted to improve and reposition the program, and in doing so, charge quite a bit more for it. Here's the strategy statement I developed to solve the problem:

*Unequivocally demonstrate the program value
so customers gladly pay 1000% more*

That's a very bold statement that hits you right between the eyes, doesn't it? In fact, it would seem to stretch the boundaries of believability.

How could we possibly get customers to accept a price increase of 1000% for essentially the same product, have them be immensely satisfied with their purchase, and experience no drop off whatsoever in sales?

Believe it or not, it was relatively easy to come up with the solution by applying the **Customer Driven Framework** to the problem. And the solution it produced was a major success.

First, the program was strategically restructured to emphasize the single most important component that customers identified as greatly improving their experience, rather than the features and benefits that were the previous focus of the program. Then the marketing campaign was redesigned to emphasize this new component, with everything else being described as supporting components.

However, nothing changed materially. The program's training materials remained exactly the same, but they were presented in a different order. And the marketing campaign was restructured to focus on this. Other than that, everything was exactly the same.

With these customer driven changes alone, we came very close to meeting the goal we had set. No, we didn't increase the price by 1000%.

But armed with a new marketing strategy, a restructured program that didn't cost a penny more to produce, and careful price testing, we managed to increase the sales price by 714% with absolutely no drop off in sales. And that price increase was maintained for well over five years until the program was finally replaced by a different program.

Over this period of time, simply by restructuring the program based on actual customer experience, the price increase we were able to maintain put millions of dollars additional profit to the company's bottom line.

How customer experience can simplify a complex product – and multiply its sales

One of my clients, who I won't name in order to protect their marketing strategy, is a spinoff from one of the largest business software companies in the world. My client purchased a division of the large software company that specializes in tracking software for manufacturing.

While this software is exceptional for properly tracking manufacturing materials from the initial sourcing and procurement, to shipping and delivery, being entered into inventory, and how it moves through the various stages of manufacturing to the finished product, then gets shipped properly, not every client needs all of these functions.

To make things more complicated, the employees responsible for each area of this complete flow often have varying degrees of education and experience that differ substantially. And that can make some of the more technical aspects of the software difficult to understand for many of these employees.

When I led a strategy development project for this company using the **Customer Driven Framework**, the solution to this problem came from a suggestion made by an employee who you wouldn't normally expect to grasp such a complex problem – one of the company's junior web designers.

Based on this web designer's suggestion and a number of refinements we added to it, we decided to create a simulation of each component of the software, demonstrating exactly how it works at the stage it applies to. In addition, each simulation included an interactive test of that component that a prospect's employees could take to determine if they would be able to properly understand and use it.

Prior to this, the company would offer a free, 60-day trial for the entire software suite, which is common with many types of software. But because of the complexity of the software and the wide range of employees who use it at each stage, few prospects wanted to commit that much effort to a 60-day test.

However, by breaking the simulations and tests into specific areas, each targeting a single function and the proper employees – and reducing the time it takes for any employee to thoroughly understand and test a function to an average of 30 minutes – prospects lined up for this offering.

As a result of this customer driven marketing strategy, the company enjoyed an immediate increase in sales of 410%.

The powerful thread these examples have in common

These successful businesses and many like them all have one thing in common. Each of these businesses used *customer experience* to create **new value** that didn't exist before.

They did not create a product in search of an audience. Instead, they created a product that satisfied customers' unfulfilled needs. Either deliberately or intuitively, their products were based on delivering a better and far richer *customer experience*.

They did not create a marketing strategy based on the typical features, benefits, offer and guarantee that are the components of a conventional marketing strategy. Instead, they crafted a marketing strategy designed to deliver the ideal experience their customers told them they wanted.

When you create products and marketing this way, they appeal to customers at a much deeper, organic level. And this works wonders for increasing your sales.

The good news is, anyone can duplicate these companies' success simply by understanding and leveraging your customer's actual experience.

I've done this all my life by creating new products and services, and new marketing strategies, marketing campaigns and business processes for my clients. All based on their customers' real-life experiences.

All it takes to do this is a new approach and set of tools that can be quickly learned and applied to produce breakthrough products, services and marketing strategies. This approach and set of tools form my system called the **Customer Driven Framework**.

Enter the age of Artificial Intelligence

On November 30, 2022, the world changed forever. That's the day that ChatGPT was released, unleashing a formidable new Artificial Intelligence tool for tapping the power of a massive amount of data.

Driven by questions or requests known as “prompts”, ChatGPT will quickly pump out a wealth of data on any topic you query it on. This is both good and bad.

The good side of Artificial Intelligence is that you can access a massive amount of data organized around your topic in just seconds. Plus, ChatGPT remembers your previous queries and can quickly improve on your results with additional queries.

The bad side of AI is that much of the results you get are either surface level, wrong (referred to as hallucinations), or infringe on others' intellectual property. In addition, because AI makes it so easy to accumulate information on any topic, you can become quite lazy in your use of it, rather than sharpening your thinking and ideas.

However, when used properly, AI can be an exceptional support tool. And my emphasis is on “support”, rather than being your main tool.

Later in this material, you'll discover exactly how to use Artificial Intelligence as a support tool to dig even deeper into discovering your customer's actual experience, then use this information to significantly improve the development of all your products, services, and marketing.

Adopting an experience-driven outlook

Creating innovative, high-value products and the most effective marketing for them, starts with a new outlook. An outlook rooted in the essential understanding of your customers' experience coupled with a new methodology for accurately determining exactly what your customers are experiencing at four critical stages:

- The experience they're having that causes them to even consider buying your product in the first place
- The experience your customer has when engaging with your marketing materials
- The experience that's produced when your customer actually uses your product
- The experience customers have when using other associated products similar to yours

There are six **Customer Driven Core Principles** that anchor this new outlook. Let's take a look at each of these principles now.

Customer Driven Core Principle #1 **Breakthrough products and marketing** **are based on customer experience**

Yes, I know I'm starting to sound like a broken record. But if repeating myself results in you fully grasping the importance of this critical concept, I'm fine with it.

I've been known to half-jokingly say that this should be Principles 1 to 100. That's how critical it is.

The majority of good companies don't fail due to poor management or unstable economic conditions. They fail because they don't innovate new products and the marketing for them that's superior to everything their competition is offering.

When you see a product go viral or gain exponential growth, it's because that product delivers a superior customer experience. In other words, your customer's daily experience is greatly enriched by using it.

The problem is that in most companies, product development and development of new marketing strategies focuses almost exclusively on the product itself. The development team seeks to answer a host of questions that are primarily about the product.

- What improvements can be made to it?
- Why did people choose this product over another?
- What additional features would cause them to pay more for it?
- How can this be done in a way that minimizes expenses and maximizes revenue?

These type of questions can only result in development efforts that center on the product itself. And as you've seen, that can be a critical mistake.

Product development for a product based on *customer experience* takes you in an entirely different direction. Rather than focusing on the product itself, the majority of your attention shifts to your customers with heavy emphasis on the *experience* they get by using your product in real-life situations.

At the same time, your marketing for that product is driven by an understanding of what your customer is experiencing that causes them to consider buying your product. And delivering an alternate, superior experience they can't get anywhere else.

When you shift your focus to peoples' behaviors, activities, needs, concerns and motivations, you gain a much deeper, enriched level of knowledge that results in the development of products and marketing that are far superior to your competitors.

In addition, you often discover unstated needs and opportunities that lead to altogether new products you never would have considered without this detailed, enriched knowledge.

Up until now, developing products and marketing based on customer experience has most often been done intuitively. But relying on intuition leaves too much to chance.

The great news is that with the new, more effective approach to creating superior products and marketing that the **Customer Driven Framework** gives you, you can leverage the power of actual customer experience in the development of all your new products, the improvement of your existing products, and all the marketing you use to sell them.

Customer Driven Core Principle #2 **Creating great products and marketing** **takes place on the road**

If customer experience is the key driver for creating great products and marketing, then it only makes sense that you have to observe and talk with people about their experience. You also have to track their actual buying behavior (another form of experience) to accurately discover exactly what people are buying as opposed to what you think might sell.

It isn't enough to conduct a conventional survey or a focus group on the use of a product or various marketing appeals. Those methods are very limited in their range of response and if they worked, companies wouldn't have problems developing superior products and the marketing for them.

So a key component of the **Customer Driven Framework** is to meet your customers where they live. Go to the places (physically or virtually) they gather while using your product or service and observe their behavior.

Talk to them about their lives in general and exactly what they were experiencing that caused them to look into buying your product. Find out which specific aspects of your marketing convinced them to buy. Ask them how your product enhances their experience and what could be added to it to make their experience even better.

At the same time, use the wealth of customer buying history that's available to you for free. There are many resources for doing this and I'll share a number of them with you later in this material.

This level of understanding of your customer's experience that's required to create truly breakthrough products and marketing can't be gained with conventional research methods. Only ***customer experience focused research*** can provide the enriched information you need to create products and marketing your competitors can't hope to match.

Customer experience focused research delivers a much deeper and richer level of information about what leads a customer to consider a product and the critical marketing points that cause them to actually buy it. It also reveals the features, benefits, and your customers' actual experience (both good and bad) in using your product, and the history of similar products your customers have bought.

These insights are obviously more well-rounded – and extremely powerful. Plus, you'll often discover new attributes of a product or its marketing, and possibly even entirely new products and marketing points, you never would have thought of.

Customer Driven Core Principle #3 **Artificial Intelligence is an enhancement tool, not a development tool**

Let me be blunt: on its own, Artificial Intelligence is of little or no use for product development or creating truly valuable marketing materials. That's because the backbone that AI is built on is an immense data set. And regardless of how you tweak it, data is cold and logical.

Data cannot reproduce *experience*. It can't come even close, regardless of what various AI vendors claim their tools can do.

I've tried many of them myself and seen the results others have produced from dozens of other AI tools. And I can tell you unequivocally, that none of these results come even close to accurately representing true customer experience.

So in this process, AI is only introduced *after* you've thoroughly researched actual customer experience at all stages and actual customer buying history, then used what you've discovered to develop a strong foundation of ideas. Then, those ideas can often be enhanced and improved – or at least, provide new insights for further ideas – when they are used as the basis of your prompts to AI.

Customer Driven Core Principle #4

Creating innovative products and marketing is holistic

Conventional product development starts with the identification of a business opportunity or technology that can be turned into a product. The marketing for that product then follows.

Unfortunately, that narrow view is no longer good enough to create products and marketing with staying power in today's marketplace.

You've already seen that customer experience is the key driver of developing high-value products. And that experience informs all aspects of the marketing for a product.

But in addition, there are external forces outside of your organization that critically affect your products and your customers' experience with your products.

These forces include changes happening in your market, evolving technology, societal changes, cultural changes, and new or revised governmental policies. All of these forces have some degree of impact on your customers, your product, and your marketing. So it would be foolish not to consider them when developing products and marketing.

Bottom line, it's vital to recognize that products, and the marketing of them, don't exist in a vacuum or in the limited framework of your business. They exist in the real world where many internal and external forces affect them.

Taking these forces into consideration and creating a complete picture of the world in which your customer lives can only lead to the development of higher quality products, more effective marketing, and an experience your customers will love, so they recommend your product to others.

Customer Driven Core Principle #5

You can greatly expand your understanding of your customer's experience by tracking their actual buying history

One of the most popular ways that many experts recommend for creating products is to ask your customers what they want and then create it. Once that's completed, you then create your marketing based on the features and benefits of that product.

But if you've ever surveyed your customers and created a product and it's marketing based on the results of your survey, you know that it often sells poorly or fails completely.

So why does this happen? Especially when people are actually trying to help you when they respond to your survey?

There are three reasons...

FIRST – Many people don't necessarily know what they want. They know what *problem* they want to solve or what *goal* they want to achieve, but they don't know how to get there.

And they're actually looking for *guidance from you*. So they aren't a great source for helping you decide which products or services to create or what will make your marketing more effective.

SECOND – When you conduct surveys, many people tell you what they think you want to hear. That's just human nature.

People actually want to be helpful when they do this. But it means that a lot of your results are highly inaccurate.

THIRD – People rarely give you the full story. They leave out many details but think they're giving you a complete answer.

Even open-ended question formats don't deliver the results you want. That's because they put all the burden of answering each question on the person taking the survey, when far superior results could be produced with the proper prompting.

But getting that prompting right, which you'll learn how to do in this material, is an art in itself. And few businesses have even an inkling on how to do this.

Because of these three factors, you end up making decisions based on inaccurate information and little or no understanding of your customer's actual experience. And that's why a product or service that looked so promising and the marketing used to promote it, fall far short of producing the results you really want.

Now, with the **Customer Driven Framework**, we use something completely different from asking your customers what they want. Instead of relying only on customers' opinions, which are always sketchy, we focus a much greater portion of our attention on the *experiences* customers have with a product and the *history of what these customers and others like them have already bought*.

This new form of research fills in all the gaps, because the experiences your customers share along with the documented records of what people have already bought are always completely accurate. And this customer experience and history of what your customers and

other people just like them have actually bought, give you the broadest possible set of data for creating breakthrough products and marketing.

Customer Driven Core Principle #6 **Innovation can and should be planned**

Creativity is at the root of many innovations, including product development and the creation of highly effective marketing. But can creativity and innovation be planned?

By all means, it can!

And innovation should be planned and engaged in on a regular basis.

What prevents most companies from innovating new products and marketing more frequently is the premise that inspiration must occur organically, that it shouldn't be forced. But there's a considerable difference between forcing something and employing an innovative, proven system to stimulate and generate high quality product and marketing ideas on demand.

Planning for innovation does not in any way hinder your creativity. In fact, when done properly, just the opposite occurs. Using the systematic process you're about to discover in this material, you'll soon see that inspiration and innovation can be regularly stimulated as often as you'd like.

A quick overview of the complete Customer Driven framework

Now that you have a solid understanding of what drives the **Customer Driven Framework**, let's turn our attention to the process itself.

There are 11 steps to the initial system, which give you a practically foolproof way to create exceptional products, improve existing products, and create highly effective marketing on demand, any time you want to.

Here's a quick overview of all 11 steps. Then I'll take you through many of these steps in more detail.

LEVEL 1 – Collect Deep Customer Intelligence

Do this *before* all Steps in LEVEL 2

Step 1: Identify your ideal customers

Step 2: Gather Deep Customer Intelligence, using a Sideways Survey

Step 3: Research your customers expanded buying history

Step 4: Enhance your Deep Customer Intelligence research with the proper AI prompts

LEVEL 2 – Apply Deep Customer Intelligence to your product development and marketing

Can do any or all of these in any order you choose

Step 5: Develop new products or services

Step 6: Improve existing products or services

Step 7: Create a breakthrough business strategy

Step 8: Create an exceptional marketing strategy, lead, and hooks

Step 9: Create a powerful offer few prospects can say no to

Step 10: Create a process for making repeat sales to your existing customers

Step 11: Create an automated process for making repeat sales to your existing customers that can be scheduled to run with little or no maintenance, generating passive revenue week-in and week-out for years to come

The steps in **LEVEL 1** are essential to all of your product development and marketing efforts. And they should be done in the order in which they're listed. These steps cannot be skipped or you risk compromising the quality of your products and the effectiveness of your marketing.

The steps in **LEVEL 2** are optional in that you can do as many or as few as you'd like. And you can do them in any order that you'd like.

IMPORTANT: The **LEVEL 2** steps that I've included here are just a partial sampling of how you can apply the deep level of knowledge you now have of the experiences that drive your customers' buying decisions. The product development and marketing activities you could add here are practically endless, but this gives you a strong starting list.

These 11 steps are a strong approximation of the entire system, with an obviously wide range of flexibility at **Level 2**. And with this quick list, you can begin to see that the system is

easy to learn and implement. But the quality of products and marketing you'll be able to develop are unrivaled, resulting in a far greater level of sales than you've ever attained before.

So now that you have this high-level overview, let's dig into the details of how you actually create breakthrough products, services and marketing by using these 11 steps.

Now, the real fun begins!

The Customer Driven Framework – Step 1

Identify your ideal customers

It's only natural that the first step in this process is to clearly identify and define exactly who your customer is. But as you'll see, the **Customer Driven Framework** method used to do this is very different than conventional methods. And far more accurate.

A cornerstone principle of the **Customer Driven Framework** is that *all product development and marketing efforts always start with your customers*. Instead of starting from the standpoint of "What kind of product or marketing would the most people be interested in", it begins with "who is our market and what are they most interested in".

While identifying who your ideal customer is and what they are most interested in may sound obvious, this critical step is the area where most people go wrong. And since this is the foundation of all successful product development and marketing efforts, if you go wrong here, everything you do after this is guaranteed to be flawed.

Improperly defining exactly who your ideal customer is instrumental in why so many seemingly good products and marketing pieces fail. You see, the customary approach of creating a customer profile or customer avatar is horribly flawed. And if you're using a customer avatar, there's a good chance it's doing significant damage to your sales.

I know this contradicts the advice you've seen in practically every marketing book, course and trade journal you've ever read. But the fact is, there is never just one customer type for your product or service.

There are actually *four separate customer types* and at least two or more will always be ideal candidates for any product or marketing piece. So if you lump all four customer types together into a single avatar, you're trying to serve everyone while really serving no one.

Take a minute to let this sink in. Because now that I've told you the dangers of using a conventional style of customer avatar, what I'll show you to use instead is one of the most critical points you'll learn in this material. And it will serve you well for as long as you're in business.

The four customer types for defining your ideal customer

Here are the details of each of the four customer types. As you read the description for each type, you may immediately recognize your ideal customer type. If not, I'll also give you instructions on how to identify which of these four types has the deepest level of interest in your product.

CUSTOMER TYPE #1: The segment of users who would be most interested in your new product, a new version of your product, or respond most strongly to your marketing

Contrary to what many businesses think – and falsely rely on – not all segments of your customers have the same level of interest in your product or marketing.

For example, while independent medical offices may be interested in your patient scheduling software, browsing your customer records may reveal that chiropractic offices purchase more than any other segment. Or dental offices... or cosmetic surgeons offices... or veterinarians offices... and so on.

If that's the case, then you can actually make more sales with less effort by focusing on this single Customer Type. And that's who you should design your product and customize all your marketing for.

CUSTOMER TYPE #2: Users who have anticipated a trend in your industry and may even have created makeshift ways of handling it

There will almost always be a segment of your customers that's more forward-thinking than others. These are leading edge "first movers" who spot trends ahead of everyone else and are most interested in new products that allow them to capitalize on these trends.

Developing your product for this Customer Type would focus on an experience, features and functions that are quite different than developing a product for customers who are satisfied with the status quo. And your marketing would need to focus on their specific wants and needs, as well as the ideal experience they're looking for. So it's critical that you realize this when developing any new product, improving any existing product, or creating marketing in any form.

CUSTOMER TYPE #3: Users who are specialists in this field and have a deeper level of knowledge

These are customers who use and rely on your product more heavily than others. Consequently, they have a deeper understanding of what your product does, how to make it work more effectively, and any flaws or missing features that it would be beneficial to improve.

Recognizing this Customer Type and adjusting your research in the next three Steps to their needs, is the key to creating a product that sells out in record time. And it should inform every step of your marketing.

CUSTOMER TYPE #4: Outlier users who have strong positive or negative opinions about your product

Outliers are a unique category of users, separate from all others. They can be customers who are strongly devoted to your product. These customers can provide exceptional feedback on what they would most like to see and experience in a new or improved product. And which features and benefits are most important to them. This can also give you powerful new insights for your marketing.

On the other hand, using your product may be a requirement of an outlier's job or the business they're in, and while they use your product, these outliers may dislike it intensely.

But this strong dislike can motivate them to give you feedback that would be vital to the development of your new product and the most effective marketing. And since they are forced by their work circumstances to use the product, you can turn this negative into a resounding positive.

How to apply this knowledge at this early stage

At this early stage, your goal should be to identify which of these four **Customer Types** make up the bulk of your customers. Here are some tips for doing this.

Take a look at your sales records to see if any of these types stand out. This may require having someone from your sales staff do this, as they would have the most reliable knowledge about which category each customer fits into.

Talk with your order desk and customer service staff to get a better handle on this. These are the front lines of communication with your customers. They speak with your customers on a daily basis. And they have a deep level of understanding of exactly which Customer Types are most prominent among your customers.

Talk with your sales staff. What kind of Customer Types do they encounter most frequently on sales calls? What kind of Customer Types do they encounter most frequently at trade shows and industry events?

Talk with members of your staff from any other area who you feel would help you best identify which of these four Customer Types exist in your business – and the overall number of each type.

Once you've identified the most prominent Customer Type for your business, you are NOW ready to create your avatar. It should include all the attributes you are already used to using, like gender, age range, profession, likes, dislikes, geographic region, things they are passionate about, and things they avoid at all costs.

The Customer Driven Framework – Step 2

**Gather Deep Customer Intelligence,
using a Sideways Survey**

The purpose of the **Sideways Survey** is to collect a deep level of Customer Intelligence on two major areas that set your research (and your resulting products and marketing) apart from all other forms of research.

The FIRST major area is **Direct Customer Experience**, as reported to you directly by your customers. You'll see exactly how your questions are formulated on your short survey in just a minute.

And I want to remind you that the reason this information is critical to creating superior products is that companies create products and marketing based on features, functions, and benefits they think their market will find appealing. But customers respond to your marketing based on an *experience* they're having that causes them to feel the need to resolve it. And they then judge your product by the *experience* they have when using it.

If you've ever used a kitchen device and said, "This is so odd. Why didn't they move the handle just half an inch to the left, so it doesn't rub against your thumb all the time?", then you understand the critical difference between the way companies design a product and the way customers experience using that product.

The SECOND major area you want to research is which products your customers are already buying – and which they're buying most frequently. Then, you'll evaluate the top sellers to gain insight into the type of experience they provide. You'll also look to see if any of their features could be incorporated into your new product – or if some feature triggers an idea for an altogether new use or new product.

Why is it so important, and so valuable, to see what other products your customers are already buying? Because no single product, including yours, delivers everything a customer needs to achieve their complete goal.

You see, while it's true that customers don't just buy a product, they *use and experience* that product, there's another important corollary to this principle. That corollary is that any product a customer buys (yours, mine, or someone else's) is never a complete solution to their situation. It is actually just a partial step in delivering the *complete experience* and complete solution your customer is looking for.

And here's how you leverage this insight...

Traveling along the Customer Success Roadmap

The fact is, the path your customer takes to achieving their complete goal is not a single step. There are always many steps along what I call the **Customer Success Roadmap**.

This isn't just a theory. It actually occurs whenever a customer buys any product or service – including yours or mine.

To make this as clear as possible in a practical way, here's an example I'm sure you can relate to.

Let's say you decide to start a keto diet. Your first purchase would probably be a book explaining what the keto diet is, why it's beneficial, what foods you can eat and what foods to avoid.

But is that the end of your journey to success with the keto diet?

Of course not!

It's just the beginning. So next, you'll probably buy...

- A keto cookbook
- Vitamins and supplements that are recommended for this diet
- A glucose testing device
- More books that go into greater detail about the keto diet
- A book on intermittent fasting (a very popular trend with keto dieters)
- A pressure cooker, which is a fast way of preparing foods without any loss of vitamins or nutrients
- Specially formulated keto foods and snacks
- New exercise equipment
- New exercise shoes
- New exercise clothes
- Group coaching with a keto certified nutritionist

- Individual coaching with a keto certified nutritionist
- And a lot more!

The list goes on and on!

Now, the important point to recognize here is that all these additional steps in the complete **Customer Success Journey** also kick in the minute someone buys ***any product or service.***

Once you recognize this, you are now in position to use many of the best features and traits of the other products your customers are already buying as input to your product development process. And this research will also reveal hot-button points, both good and bad, that help make prospects far more responsive to your marketing message.

Using the Sideways Survey to determine your customers' true experience and exactly what your customers are buying

So now your task is to find out from your customers the two primary factors we've been discussing.

The first factor is **Customer Experience**. What were they experiencing that caused them to feel the need for your product? How did you address relieving that need in your marketing? And what has their experience been with using your product?

These are critical attributes that will help you create products that are superior to anything your competitors offer. And convey the exact message in your marketing materials that generates the greatest number of sales.

The second factor is discovering the other products and services your customers buy most frequently in order to fully achieve their complete goal.

But remember, conventional surveys don't work very well for this. They are one-dimensional and prone to biased answers.

That's why so many products that are developed based on asking your customers what they want turn out to be total flops. And why creating marketing based on that information is always severely flawed, resulting in a poor level of sales.

These flaws are why we use a very different tool for this critical research. The tool you'll be using is an instrument I developed called the **Sideways Survey**. Instead of asking your customers what they want, it's designed to measure what they are experiencing and what they are actually buying.

The actual experience a customer has along with the history of what they have recently bought are always far more accurate identifiers of what they will buy more of and what experience, features, functions, and benefits they value most.

Unlike conventional surveys that get predictable, bland answers, the **Sideways Survey** doesn't ask people what they want or how they'd rate a list of options presented to them. Instead, it uses just two to four questions, depending on what industry you're in.

All of these questions are written in a social media style. These mimic a common style of questions you see on social media every day.

Because they feel so friendly and familiar, the **Sideways Survey** questions generate a high level of engagement and maximize the number of responses you get. Most importantly, they reveal the *real-life experiences your customers have and the exact products and services your customers are buying right now.*

With the results you get from these questions, you'll gain a much deeper understanding of what experiences, features, functions, and benefits matter most to your customers. This deep level of knowledge will trigger new ideas for your product development projects and possibly even generate a number of altogether new product ideas. And it will help you create marketing that outperforms anything you've previously been using.

Creating your Sideways Survey questions

So what exactly does a set of **Sideways Survey** questions look like? It depends on what market you serve and the goal you want to help your customers to achieve.

However, I'll give you an example here that applies to just about any market. The questions used here are great for starting out with and as you get more experience, you can start crafting others of your own. Just keep in mind that the goal is to identify exactly what your customers are experiencing and already buying and you can't go wrong.

For this example, I created three questions that will give you a deeper understanding of how **Sideways Survey** questions are structured. And more importantly, why they produce such accurate results.

These are the three questions I developed for a client of mine who sells software for creating graphics to the business market. For this project they were looking to refresh one of their current graphics products and for ideas for new products, given the ever-increasing changes and improvements in technology. And they would also use any insights they gained to improve their marketing materials.

Sideways Survey Question 1: What were you experiencing right before you bought this software that caused you to take a look at it? (It could be poor results from other graphics software – or a specific need you were feeling intensely)

Sideways Survey Question 2: What single component or function of this software would make you NOT buy it if it was missing?

Sideways Survey Question 3: What other products or services have you bought to help you create better graphics?

So those are three strong starting questions that can be used to create an effective **Sideways Survey** for any product or service. And there are a number of important points about how these questions are structured.

FIRST – they don’t ask people what they think they would buy. Instead, they are designed to generate clear, specific answers about *what your customers experience and what else they have already bought*.

You’ll also notice that two of the three questions focus on *customer experience*. And only the final question is devoted to actual customer buying history. Then, in the next step, we’ll use the answers to this final question as input for greatly expanding your knowledge of a wide range of related products and services your customers have actually bought – along with which of those they value the most.

SECOND – these questions are posed in a natural, “social media” style. You’ll frequently see questions posted on social media that ask:

“What’s the best graphics package that’s easy to use?”

“What’s the best graphics package for my staff other than Adobe products?”

“What has your experience been with the update to ABC Software. Is it worth updating?”

These type of questions always generate a high level of engagement, answers and opinions. And that’s exactly what you’re looking for.

Also, there are two important reasons why I don’t ask more than four questions in a **Sideways Survey**. And like you seen here, I’ll often use just two or three questions.

First, you don’t want people to rush through their answers. So asking just a few questions gives them room to think before they answer.

Second, you don't want to take too much of your customers' time. People are always happy to answer a few questions, but if you give them a long list of 10 or more questions, a high percentage of customers will bail on you.

How to deploy your Sideways Survey

In **Core Principle #2**, I mentioned the importance of actually talking with your customers, because of the invaluable insights you gain when you do this. And I specifically mentioned talking with them in-person, whether in the same physical location or over Zoom.

While this still holds true, because peoples' behaviors have changed dramatically, it's become increasingly difficult to connect with customers in person. That's because people now block most calls from numbers they don't recognize, which makes picking up the phone and calling a customer nearly impossible.

And getting customers to commit to speaking with you by Zoom can require considerable back-and-forth contacts to find a mutually agreeable time to talk. So this method, too, can be frustrating and often ineffective.

However, whenever possible, I strongly recommend that you speak to as many customers as possible in conducting your **Sideways Survey**. Almost always, this will produce insights you can't get any other way.

At the same time, due to how much more difficult it's become over the past five years or so to actually speak to your customers in person, I've been testing another method of deploying your **Sideways Survey** that is nearly as beneficial as using it in face-to-face meetings with customers.

A second, more practical, and highly reliable alternative to in-person calls for conducting your Sideways Survey

Because of how difficult it's now become to connect with customers in person, I was committed to finding a method that works nearly as well. And over the years, by fine tuning the actual survey questions along with testing a number of different mediums, I was able to find a practical and highly reliable alternative.

That alternative is a tool that everyone uses every day and checks multiple times every day. Of course, I'm talking about email. And when you use email as the medium for conducting your survey, you'll find that the responses you get are of the highest quality.

So let me show you exactly how this email is structured, how to send it, and how to compile the answers you get in order to produce the most valuable results.

All it takes is sending an email with a short, simple message like:

“I’m always looking for ways to improve our products to help you get more of the results you want. If you could answer the few questions below, which will only take two minutes, I’d really appreciate it.”

Then you insert your survey questions, thank your customer again – and soon the answers will come rolling in.

Compiling the answers to your Sideways Survey

Not only is your **Sideways Survey** sent as an email, but the customer’s answers are also returned to you in the form of an email. This is done intentionally, and I want to emphasize that you never want to use a conventional survey form or survey software.

There are two reasons for this. First, you want your survey to feel warm and personal. The message I gave you above is conversational and sounds like it’s coming from a real person, not from an automated mass mailing.

Most importantly, your **Sideways Survey** questions are also conversational and employ a “social media” format, resembling the kind of questions people ask on social media all the time. The purpose here is to generate the highest level of engagement and replies to these questions. So email is the perfect vehicle for consistently appearing personal.

Now, in case you’re wondering if it takes longer to compile the answers you receive by email than it does when using a survey form or survey software, the answer is yes, it does take longer. But it’s well worth the extra time to be able to get such a detail-rich picture of your customer’s actual experience in using your product and their actual buying history.

With survey software, the software does most of the compiling of answers for you. The problem is that the answers must be static and one-dimensional for the software to compile it accurately.

So that leaves us with two options: (A) compile the answers manually, such as using a Word document; or (B) enter the answers into a spread sheet. Both work well, but of these two options, I greatly favor a simple Word document.

With a Word document, in addition to collecting answers and counts, you can also keep track of important comments. For example, if you’re surveying for customer experience on your

keto product, the answers will nearly always reveal common frustrations or goals that led people to buy your product. Because these don't necessarily fit into formulaic answers, tracking them in a Word document gives you the ability to spot critical themes for creating new products or improving existing products.

Those answers will also reveal detailed information on the attributes of your product that people find the most valuable and the least valuable. Here again, this is an absolute goldmine for the development of new products, improvement of existing products, or creation of marketing materials that increase your sales substantially.

The questions also reveal which other products that your customers have recently bought to help them achieve their goal. Often, these comments will include raving reviews of a particular product or products. This is another powerful source of information for the attributes your own new product should consider including and critical points to include in your marketing.

When you have the ability to track comments in this way, you can identify features of other products that have strong favorability and loyalty. When this occurs multiple times for a specific product or service, you know that it's a good item to review to see which features and functions might be included in the product you're developing. And a simple Word document is the best tool for making note of these important occurrences.

Your goal when compiling your answers is simple. To start, look for the most common experiences that led people to buy your product or service. Those embody the problems that are frustrating them and/or the goals they want to achieve.

Next, look for stand-out similarities of the experiences people have when using your product or service. What CAN'T they live without? What would be a deal breaker if it was removed from your product? Those elements are input to what you'll want to factor in and emphasize in your new product and its marketing.

Finally, look for those products and services your customers have bought that get the most mentions, giving extra weight to those that are accompanied by great comments. Arrange those products and services by count, with those getting the highest counts at the top and working down. You'll then know exactly which products are the most frequently purchased and most popular with your customers.

I look to build a list of 10 to 20 products and services that many customers have already bought. These will generate a wealth of valuable information to be used as input to your product development and marketing efforts.

This method of hand-compiling your answers obviously takes more time than automated compiling. But nothing else can match it in producing a highly productive list of insights as to your customers' actual experience with your product and the type of products and services that your customers value the most.

The bottom line is this – you'll be glad you put in the extra time up front once you see how this **Deep Customer Intelligence** results in a wealth of great ideas for developing a new product, improving an existing product, and improving all aspects of your marketing.

The Customer Driven Framework – Step 3

**Research your customers'
expanded buying history**

At this point, you've collected a wealth of information about what your customers experience in their daily life, what they've experienced when using your product or service, and what they are already buying. But we're not done yet.

While no further research is needed on customer experience, there's plenty of valuable, expanded information available on what products and services related to yours that your customers are actually buying.

Our goal is to create as rich a picture as possible of the products and services your customers are already buying. Why? Because as you'll hear me repeat over and over, the history of what people have already bought and like is a strong predictor of what they'll buy more of.

So when you uncover the exact products your customers and others just like them are already buying, you can identify high-value attributes of those products to include in your product development and marketing efforts.

Collecting this type of valuable information requires digging deeper, using readily available research sources that specialize in this type of information.

Not too long ago, if you wanted to gather independent research on what your customers are already buying, you would have had to pay a research firm tens or hundreds of thousands of dollars. But now, you can get all the high-quality research you need – literally millions of dollars worth – for free.

Four highly effective, free research resources

There are literally dozens of ways to gather a deep level of customer buying history. Some are paid services and the others are free.

For our purposes, we'll stick with the free resources because they deliver a wealth of information – and they do it much more quickly than most paid resources. As I said, there are literally dozens of research resources available, but in keeping with making everything as simple as possible, we'll focus on two categories:

Category 1 – Online shopping reviews

- Amazon.com
- Google shopping

Category 2 – Social media groups

- Facebook groups
- LinkedIn groups

Let's take a deeper look at how to leverage these resources to get all the research you need on your customers' buying behavior. And get it all for free.

Conducting customer buying research with online shopping reviews

While there are dozens of online research resources that deliver quality information, two of the best and easiest to use are Amazon.com and Google Shopping. The method for using both is similar, with just minor changes in details.

For our purposes, I'm going to use Amazon to show you the process for gaining an even deeper understanding of what your customers are currently buying. In fact, Amazon has such a feature-rich set of research components, that you may not need anything else.

To start with, let's say that you already sell a book on the keto diet. Through the use of your **Sideways Survey**, you've determined that the item your customers most frequently buy after having bought your diet book is a keto cookbook. So you've decided that you'll develop a keto cookbook of your own.

In order to create an exceptional product and the most effective marketing for it, you'll want to research all the best features and functions of other top-selling keto cookbooks to help you decide what to include in yours.

What content should your book include? How long should it be? Color or black and white illustrations? Your own recipes, guest recipes or both? And many other considerations.

What benefits do customers value most? What other benefits do they wish they could get.

Your first step is to go to Amazon.com and enter "keto cookbooks" into the search window. As you do, Amazon gives you a list of suggestions for that term.

One of these suggestions Amazon filled in when I entered "keto cookbooks" was "keto cookbooks best sellers". It almost seems like Amazon can read your mind!

So if this entry is to your satisfaction, you click on it and hit “Enter”. And then a long list of results are returned.

Now, if you were to scroll down the entire page that’s returned, you’d see that there are about 40 entries on the first page. And there are dozens more pages that follow.

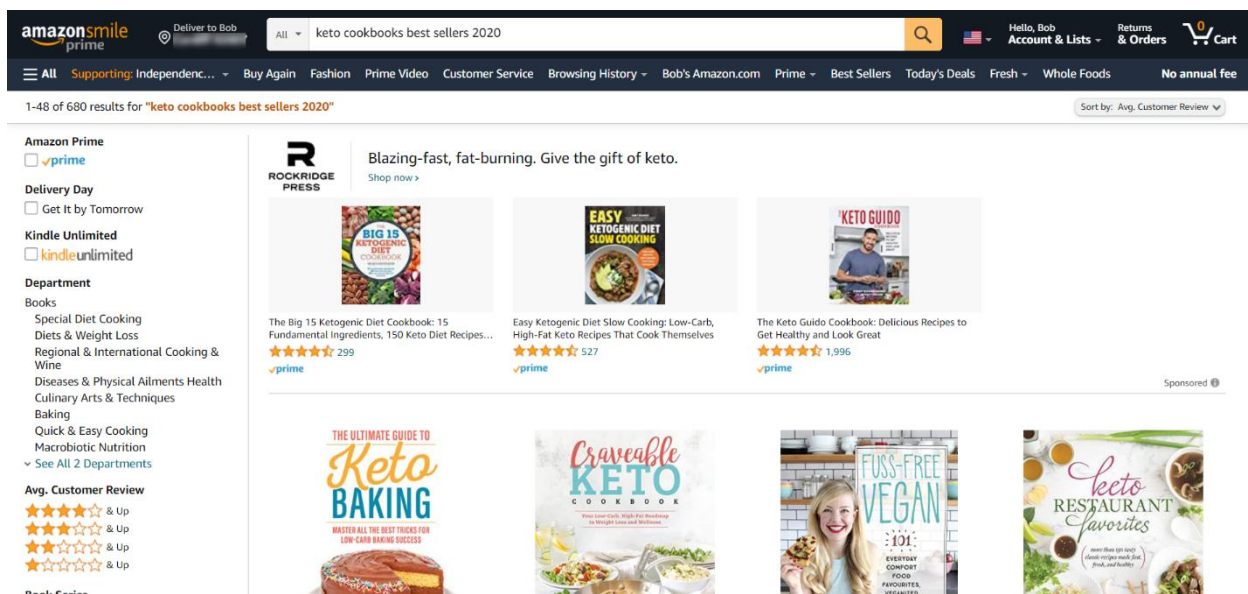
This is far more information than you want to have to dig through, so let’s narrow the results down and improve the quality of those results at the same time.

To get to a list of the best of the best, at the top right of your results screen (or possibly somewhere else as Amazon changes the location from time to time) look for a drop-down selector that lets you choose to see the results in a number of different ways.

The first screen you get when you enter your initial search, has the selector set to “Featured”. But “Featured” is a nebulous term that often means that Amazon has placed these items at the top because they pay Amazon a higher commission rate from the sales of these products than from others.

To overcome this, click on the downward arrow in the selector box, which opens up the list of Sort choices. And for our research purposes, you’ll select the “Avg Customer Review” option.

Selecting “Avg Customer Review” (as you can see in the top right corner), changes the listings you get considerably, as seen here on this second partial screen shot:



Amazon now shows the products that buyers give the highest ratings first, and now the listings you see are completely different. And these are exactly what we’re after.

Using your search results to gain deeper insight into features and functions to include in your own product

Remember, the goal of all your research is not just to discover what your customers are already buying. The real goal is to identify the *features and functions of those products* that buyers like most and can be applied to the development of your new product. And the benefits that can become the focus of your marketing.

So let's take a look at how you use the information you've found to dig even deeper and identify valuable features, functions and benefits you might want to include in your own product.

On the previous screen shot, the second entry was for a diet book called "Craveable Keto". In order to identify the features and functions that could help in the development of your own product, there are three techniques to use.

Research Technique #1 – Read the product description and reviews to identify features, functions and benefits

Start by reading the product description and editorial reviews. While this won't necessarily uncover a wealth of information, it shows you the way the company wants their product described. And if a company is smart, they include their most valuable features, functions, and benefits in their descriptions.

So keep a Word document open and as you read the product description and editorial reviews, take notes on anything that seems like it might be of value.

Research Technique #2 – Browse the Table of Contents for more features, functions, and benefits

Next, on the main page for the book, click the "Look Inside" link by the picture of the book to see the insides. Here again, Amazon changes the name of this function from time to time, but what you're looking for is the feature that lets you view inside the book.

The area you're interested in seeing is the Table of Contents. Just browsing through the Table of Contents will trigger a number of good ideas for which features, functions, and benefits are the most valuable. Plus, the wording for each of the main topics will often spark ideas for things you hadn't considered including in your product and marketing, many of which could give it a much stronger appeal.

Often, some of the headings in the Table of Contents are live links that will take you to that section of the book if you click it. I don't spend much time doing this, but if you see an important topic you overlooked or hadn't considered, you might want to click that link to gain a better understanding of it – and get even more features, functions, and benefits ideas.

Here again, be sure to write down any ideas or idea fragments you get while going through the Table of Contents.

Research Technique #3 – Read the customer reviews

Now you're about to strike gold! As you recall, one of the key purposes of the **Sideways Survey** is to gather research on what your customers are actually buying. And because of the open-ended structure of my survey format, customers will often include rave reviews of a product they love.

But this research technique takes customer input to an altogether new level. That's because you have thousands of reviews that are written by actual customers in their own words. And they clearly tell you exactly what people like and dislike most about any product.

At the top of the screen for any product, you can see the average customer rating and the number of customer reviews it has. The number of ratings is a live link, and when you click it, you're taken to the customer reviews that have that rating for the product.

Reading these reviews will give you a wealth of information. You'll be able to identify many features, functions, and benefits that actual buyers value the most. So be sure to write these ideas down.

At the same time, by clicking to view the lowest ratings, you'll see features and functions that customers have found to be disappointing. And customer suggestions for other features and functions they feel would improve the product. Be sure to write all of these down.

Are you beginning to see why I call this third Research Technique pure gold? You simply can't find a better source of detailed information on what real customers like, dislike, love, and hate about products they have actually bought and used.

Plus, because it's all available in a public forum, it costs you nothing. This in itself is remarkable, because if you hired a research firm to compile the same information for you without using these buying sources, it would run you in the hundreds of thousands of dollars.

By the time you've finished using these 3 research techniques, you should have a sizable list of great ideas for features, functions, and benefits to include in developing your product.

Conducting even more research

As I mentioned earlier, there's a wide variety of other research resources available to you. And those I recommend using, both for the quality of information you'll find and the fact that they are free, are online shopping reviews and social media groups.

Deciding which of the resources that provide shopping reviews or which social media groups are best for you always depends on the market you're in. For example, if you offer leadership training for C-suite executives of Fortune 1000 companies, Facebook groups won't be of much use to you. So you'll want to focus your social media research on LinkedIn groups.

But regardless of which specific resources you're using for your research, your goals are always the same. The first goal is to identify those products and services your customers and people just like them have already bought and rated as being the most valuable.

Your second goal is to then identify the features, functions, and benefits people like the most from those highly rated products. And those features, functions, and benefits they strongly dislike.

The process for doing this with any research source is essentially the same as what I just showed you with the Amazon example above. The research sources you use may use terminology that's different than Amazon's, but they all allow you to drill down a number of levels to collect a huge amount of valuable research for free.

The Customer Driven Framework – Step 4

**Enhance your Customer Intelligence research
with the proper AI prompts**

If you recall, **Core Principle #3** of the **Customer Driven Framework** states that:

*Artificial Intelligence is an enhancement tool,
not a development tool*

So let me make it clear that I never use AI as the starting point for developing products or creating marketing. Because when used that way, the results it produces are mediocre. But when you use AI to *enhance* the research and ideas you've already come up with, it can make significant contributions to developing a breakthrough product and exceptional marketing.

So why is AI of so little value as a tool to directly create your product or marketing – despite what so many AI vendors promise you? It's because none of the data used by any generative AI tool (meaning it can generate text, images, videos and other data), is original.

AI is driven by an immense data set. But that data is collected through mass scale scraping of various Internet resources. A sampling of these resources includes:

- Books
- Social media
- Wikipedia
- News articles
- Websites
- Speech and audio recordings
- Forums
- Research papers
- And more

While ChatGPT and other generative AI tools can combine this vast data set in interesting ways, it doesn't have the creative capacity or the technological capability of producing anything truly unique or new. So expecting it to do so would be a critical mistake.

However, when used properly, AI is an excellent tool for *enhancing* the ideas you've already come up with. And stimulating new ideas.

All it takes is feeding your AI tool of choice the information you've collected and asking it for recommendations by making requests known as "prompts".

This is why in the **Customer Driven Framework**, the use of AI is only introduced *after* you've developed a strong foundation of ideas. At that point, you're now ready to enhance and improve the ideas you've created. And to potentially spark even more new insights and ideas.

The AI tool used in this program

In this program, we'll be using ChatGPT as our AI tool. While there are now a wide range of AI tools available, ChatGPT is the 800-pound gorilla – the AI tool used by far more people than any other tool. Plus, it's easy to use, which is the second important reason why I've chosen it for this demonstration.

ChatGPT has a free version and a paid version. Both are very effective and I recommend starting with the free version as a way of getting familiar with AI tools.

OpenAI is the company that created and owns ChatGPT. You can create your account and begin using ChatGPT by going here:

<https://chat.openai.com/chat>

So let's move on and I'll demonstrate exactly how to use ChatGPT for your product development and marketing projects.

A step-by-step demonstration of using AI to enhance your product and marketing ideas

Using ChatGPT, or other AI tools, to generate enhanced ideas for your product development and marketing projects is relatively easy. It consists of just three steps:

Step 1 – Feed AI your base information

Step 2 – Issue your initial prompt

Step 3 – Stack on additional prompts to generate deeper levels of information

So let's use ChatGPT to create enhanced ideas for our example project.

Step 1 – Feed AI your base information

In order for ChatGPT to respond to your prompts with the highest quality results, it's important to begin by feeding it a base of information as a starting point. While you can just start prompting without base information, feeding AI a foundation to start with will always produce better results. And since it takes very little to do this – and you already have that base information from your research in the previous Steps – your first step here will always be to feed your AI this base information.

To refresh your memory, in our example, you already sell a book on the keto diet. And through your **Sideways Survey**, you've determined that the item your customers most frequently buy after having bought your diet book is a keto cookbook.

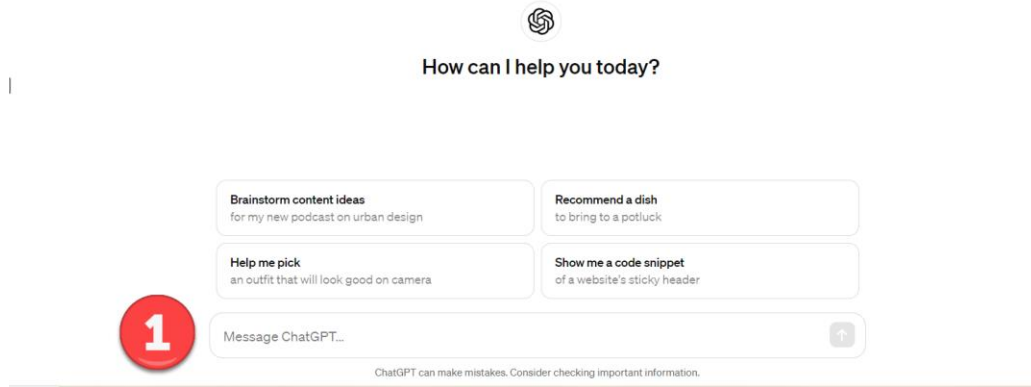
Based on this feedback, while there are already a number of keto cookbooks on the market, you've decided that you'll develop one of your own. Then, in conducting your initial research, you determined that one of the existing cookbooks with the highest popularity and customer ratings is "Craveable Keto".

Next, if you continued the research process I gave you in **Step 3**, you would find a long list of other keto cookbooks that fit the requirements of being highly popular and having the highest customer ratings. Although I didn't display that list, two of these books would be "The Everyday Ketogenic Kitchen" and "Live Life Keto".

For this example, these three existing cookbooks make up the base information that we're going to feed into ChatGPT.

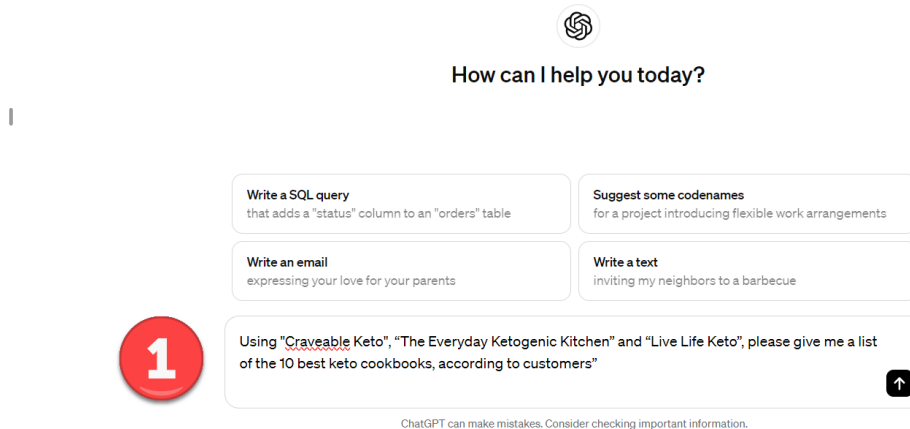
Step 2 – Issue your initial prompt

Now we're ready to use this base information to create your initial prompt. So let's open up ChatGPT and do that.



In the image above, you can see the initial screen you get when you open ChatGPT. The box I've marked with the red number one is where you feed ChatGPT and issue your prompts.

For our initial prompt, we're going to feed ChatGPT our base information within our initial prompt, as that prompt will include that base information. Here's the ChatGPT screen with the prompt filled in.



As you can see on the screen above where I've marked it with the red number one, the prompt I've created is:

Using "Craveable Keto", "The Everyday Ketogenic Kitchen" and "Live Life Keto", please give me a list of the 10 best keto cookbooks, according to customers

You'll notice that I've embedded the base information I want to use – the titles of three highly popular keto cookbooks – into my prompt request. That request is asking AI to use this base information to create a list of the 10 best keto cookbooks, according to customers.

There are three important points to notice about this prompt.

Point #1 – It's simple. While you can make your prompts as detailed and complex as you'd like, I find that the best results are produced by keeping your prompts clear and simple. Give ChatGPT as much information as needed, but no more.

Point #2 – It starts with the most critical factor, your customer's viewpoint. The final three words of this prompt, "according to customers", focuses ChatGPT on the approach you want it to use when compiling and delivering your results. Being specific in this way helps make sure the results you get are as accurate and valuable as possible.

Point #3 – It's polite! You'll notice that I used the words "please give me" when structuring this prompt. It's been my experience, and I've been told the same by a number of AI experts, that a polite prompt generates the best, most extensive results. While I can't give you conclusive proof that this is true, "please" is just one additional word, so it can't hurt to include it.

The results of your initial prompt

Now, let's take a look at the results you get from this prompt, which you can see on the screen below.

**ChatGPT**

Certainly! Based on the popularity of "Craveable Keto", "The Everyday Ketogenic Kitchen", and "Live Life Keto", here are 10 similar keto cookbooks that you might enjoy:

1. "Keto Comfort Foods: Family Favorite Recipes Made Low-Carb and Healthy" by Maria Emmerich
2. "The Keto Diet: The Complete Guide to a High-Fat Diet, with More Than 125 Delectable Recipes and 5 Meal Plans to Shed Weight, Heal Your Body, and Regain Confidence" by Leanne Vogel
3. "The Easy 5-Ingredient Ketogenic Diet Cookbook: Low-Carb, High-Fat Recipes for Busy People on the Keto Diet" by Jen Fisch
4. "Simply Keto: A Practical Approach to Health & Weight Loss, with 100+ Easy Low-Carb Recipes" by Suzanne Ryan
5. "The Keto Reset Diet Cookbook: 150 Low-Carb, High-Fat Ketogenic Recipes to Boost Weight Loss" by Mark Sisson
6. "Keto Made Easy: 100+ Easy Keto Dishes Made Fast to Fit Your Life" by Megha Barot and Matt Gaedke
7. "The Big Book of Keto Diet Cooking: 200 Everyday Recipes and Easy 2-Week Meal Plans for a Healthy Keto Lifestyle" by Jen Fisch
8. "The Keto Diet Cookbook: 140+ Flexible Meals for Every Day" by Leanne Vogel
9. "Quick & Easy Ketogenic Cooking: Meal Plans and Time Saving Paleo Recipes to Inspire Health and Shed Weight" by Maria Emmerich
10. "The Keto Instant Pot Cookbook: Ketogenic Diet Pressure Cooker Recipes Made Easy and Fast" by Urvashi Pitre

These cookbooks offer a variety of recipes and insights into maintaining a ketogenic lifestyle, similar to the ones you've mentioned.





ChatGPT can make mistakes. Consider checking important information.

In about 5 seconds, these are the results that ChatGPT returned. How cool is that!

However, while this is great, we are NOT going to jump online and go to Amazon or Google Shopping to start researching the good and bad points of each of these books. Instead, we'll have ChatGPT do that research for us.

Step 3 – Stack on additional prompts to generate deeper levels of information

Prompt Stacking is the name I've given to the process of issuing a series of prompts that all build upon the results of your prior prompts.

One of the best features of ChatGPT is that it remembers the results of all your prompts. So you can leverage its memory to refine your prompts, with the results of each additional prompt creating more and more valuable information.

To complete this demonstration, I'm going to show you a stack consisting of 5 total prompts. And to save time, because it isn't necessary to see the results for each prompt in the stack, I'll just show you the remaining four prompts and then the final result.

The first prompt was our initial prompt above. For our second prompt in this stack, we're going to issue this request to ChatGPT:

Using the list you just returned, please list all the best attributes of these cookbooks, as reported by their readers

Because ChatGPT remembers the results of your last prompts and it already has the data from all 10 of these books stored in its memory, when you issue this prompt, you get high-quality, detailed results in just one second.

One. Freaking. Second!

You couldn't possibly do any meaningful research on your own in just one second, but for each of these 10 books, ChatGPT gives you a bullet list of the best attributes. And these results are pure gold.

These results do a number of great things for you.

FIRST – you can begin to see similar ideas among many of the attributes for each book. These repeated attributes show you that they are highly valued by *paying customers*.

SECOND – you'll see some attributes that are new and you hadn't considered. Be sure to add these new ideas to your list.

THIRD – many of these repeated ideas and new ideas will spark additional ideas of your own. So you know what to do – add them to your growing list!

Stacked Prompt #3 and 4

For our third prompt in this stack, we're going to issue this request to ChatGPT:

Now, using the same list of books you created, please list all the most disliked attributes of these cookbooks, as reported by their readers

Once again, because ChatGPT uses its massive memory, it returns a complete set of results in just one second. Astounding!

Some of the ideas returned by this prompt that you'll want to include on your research list are complaints about recipes, ingredients, illustrations in the books, and difficulty finding some of the recommended ingredients. More ammunition to be added to your list of ideas.

Now we're ready to step things up to the next level. So with the fourth prompt in this stack, using the information we've collected so far, we're going to ask ChatGPT to actually create a potential product!

Here's the prompt that we'll use to do this:

In your opinion, based on the attributes you've listed, what combination of the best attributes minus the worst attributes would produce an ideal new cookbook?

Once you issue this prompt, ChatGPT instantly returns a list of 10 different types of cookbooks you could create. This includes family-friendly recipes for comfort foods... quick and easy, nutritious recipes for people on the go... fast and easy Instant Pot recipes... and much more.

As a result, you now have a great starting list for creating an epic keto cookbook! And all it takes are a few properly constructed prompts.

Stacked Prompt #5

For our final prompt in this stack, we're going to pull out all the stops!

Now, we're going to ask ChatGPT to create an outline for an entire keto cookbook. And we'll ask it to include chapter titles, the main points for each chapter, and potential titles for the cookbook itself.

As you've probably noticed, as we add more prompts to our stack, the purpose of each new prompt is to add even deeper layers of detail.

This requires that the prompts themselves include an increasing level of detail. You can see this level of detail in the final prompt that we'll issue:

Use everything you've discovered so far to create a detailed outline for this cookbook. Please create a list of chapters with chapter titles and include options for the name of the cookbook.

Once we submit this prompt, here are the results it returns.



ChatGPT

Title Options for the Cookbook:

1. "Effortless Keto: Quick & Easy Recipes for Busy Lives"
2. "Keto Made Simple: Delicious Recipes for Health & Convenience"
3. "Everyday Keto: Family-Friendly Meals for Busy Days"
4. "Simply Keto Living: Practical Recipes for Health & Happiness"

Outline:

Introduction:

- Overview of the ketogenic diet
- Benefits of keto lifestyle
- Tips for success on keto
- How to use this cookbook effectively

Chapter 1: Keto Basics

- Understanding the ketogenic diet
- Macros and meal planning
- Kitchen essentials for keto cooking
- Tips for success on keto



Chapter 2: Quick & Easy Breakfasts

- Simple morning meals for busy days
- Make-ahead options for breakfast on-the-go
- Breakfast skillet variations
- Smoothie and shake recipes

Chapter 3: Family-Friendly Lunches

- Packable lunch ideas for work or school
- One-pot lunch recipes for easy cleanup
- Sandwich alternatives and wraps
- Salad variations and dressings

Chapter 4: Weeknight Dinners in a Flash

- 30-minute keto meals for busy evenings
- Sheet pan dinners for effortless cooking
- Instant Pot and slow cooker recipes
- Dinner bowl variations for customizable meals



Chapter 5: Comfort Food Classics, Keto-Style

- Low-carb versions of favorite comfort foods
- Keto-friendly pizza variations
- Casseroles and baked dishes
- Pasta substitutes and sauces

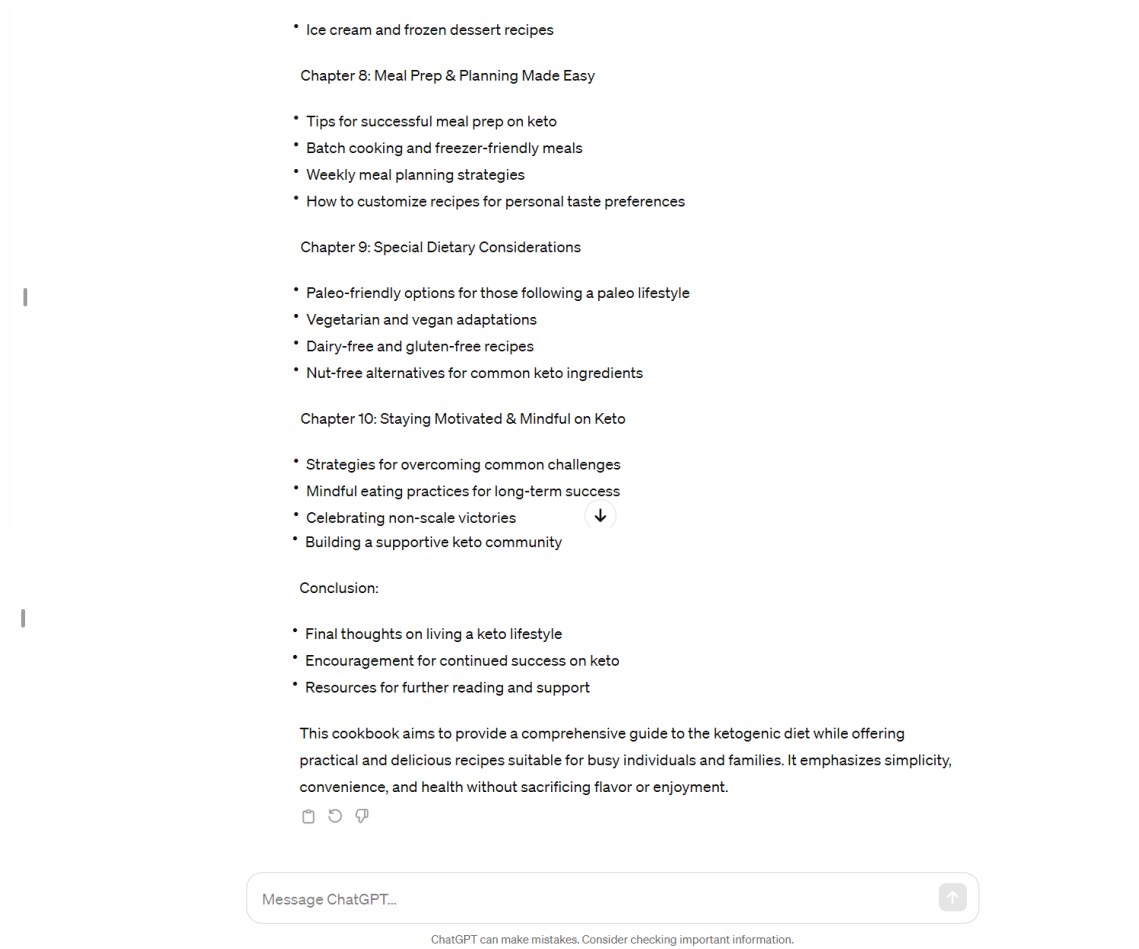
Chapter 6: Snacks & Appetizers for Any Occasion

- Quick bites for satisfying cravings
- Party-friendly appetizers and finger foods
- Crunchy snacks and dips
- Nut and cheese platters

Chapter 7: Decadent Desserts without the Guilt

- Indulgent treats for special occasions
- No-bake dessert options for hot days
- Single-serve desserts for portion control





As you can see, the results this prompt returns are practically mind-boggling. With just a short prompt and one click, you immediately get a high-level outline.

This includes chapters with titles that progress in a perfectly organized way. It includes excellent points to include for each chapter. And a good starting list of titles for your keto cookbook.

Does this mean that you're done generating ideas and now you're ready to start writing your cookbook? Not at all.

But what this gives you is a glimpse of what an excellent keto cookbook might look like. Most importantly, this view is created through the lens of what paying customers liked and disliked the most about a variety of highly rated cookbooks.

The key point to remember is that running this prompt stack has *enhanced* the ideas you already have. It added to them, helped you note others to be sure to avoid, and sparked a wealth of new ideas.

With this, the research stage for your product is complete.

Using Stacked Prompts to generate marketing ideas

The demonstration I just took you through of using the **Customer Driven Framework** to generate powerful ideas for the features, functions, and benefits your product should have, all based on discovering a deep level of understanding of your customer's experience and buying history, can also be used to generate exceptional marketing ideas. And by this, I mean you can use the same research without any changes to it whatsoever.

Remember, at this stage you're just doing a deep level of research. You are not ready to create your product or your marketing yet.

But one of the added benefits of using the **Framework** is that these four research steps are identical for creating or improving your products or creating or improving your marketing. So you can use the exact same research you've just completed for creating new products, improving existing products, AND for improving your marketing without needing any further research.

Here's why this exact same research will fuel all your marketing efforts.

When your marketing falls short of producing the results you want, it's because you aren't addressing the issues – both obvious and beneath the surface – that matter most to your customers.

These issues could be giving the proper emphasis to the benefits your customer wants most. Or recognizing benefits that you aren't mentioning or highlighting.

It could be a feature or function of your product that doesn't deliver the experience your customers want. So you'll have to either figure out a direct solution or provide a work-around that addresses the issue and include that in your marketing.

Finally, it could be the fears and objections your customers have about your product, whether or not these fears are valid. Customers may fear they don't have the level of skill needed to use your product properly. Or fear that your product is too basic. Or fear that other products similar to yours just left them frustrated, with no real results, so it's likely that your product will do the same.

These are all important fears and objections that can only be discovered by digging deep into your customers' experiences and actual buying history. And without understanding and addressing each of them, your marketing materials will never produce the results you really want.

But the important point is that the exact same approach to your research that I just shared with you will produce the knowledge and ideas you'll need to solve your marketing problems or create new marketing that dramatically outperforms your current marketing.

So rather than repeat the entire process again, let's move on to seeing how you apply the invaluable information you've amassed to create breakthrough products, marketing, and sales growth.

The Customer Driven Framework

Compiling your research findings

At this point, you've now completed all four of the research steps in **LEVEL 1**. As a result, you should have a rich base of knowledge about your customers' experience and the products they buy in addition to yours in order to achieve their complete goal.

However, the knowledge you've gained, as rich as it is, is still in a raw format. Sure, it's triggered some great ideas along the way, but now you want to organize it in a way that will accelerate your ability to create breakthrough products, services and marketing.

So here are some tips for doing that.

Focus on the critical elements that matter most to your customers

You can create a product or service that tests out great in your feedback groups. Your peers tell you they love it. Your customers tell you they love it. Prospects gathered from reliable sources tell you they love it.

You can create marketing that uses every proof element you've been told you must have. You can include great testimonials, a "truck load of bonuses", a special price for acting now, and a countdown timer to ratchet up the perceived need to buy now.

But I'm sorry to tell you that all these things are worthless without the missing link. And you already know this from the painful experience of having created products, services, and marketing using the conventional wisdom.

The missing link I'm referring to is the **Deep Customer Intelligence** that allows you to focus on what *truly matters most to your customers*. That makes them feel heard, understood, and serviced at a level they never thought a product, service, or marketing could.

Armed with this deeper level of Customer Intelligence, you now have the ability to:

- Understand *exactly* what a customer was experiencing that led them to consider your solution
- Clearly understand the most critical problem your customer wants to solve – or the most important goal they want to achieve – immediately
- Pinpoint the exact wants, needs, desires, fears, frustrations and goals your customer experiences on a daily basis and urgently wants to solve

- Understand what they already know about the problem they want to solve or goal they want to achieve
- Gain a clear understanding of the components that work and those that don't work from other potential solutions they've tried
- Understand exactly what language they use – and speak to them in this way in order to gain the utmost credibility and acceptance

These are the six categories you should use to organize the rich results of your research. Create a heading for each of these categories and list every piece of research that applies under each category.

It's perfectly alright to include some of the results of your research in multiple categories. Because your goal is not to organize everything perfectly, but to enable you to address the experiences, wants, and needs your customers value the most.

So with this basic foundation in mind, let's take a look at how you apply this deeper level of **Customer Intelligence** to create superior solutions you couldn't achieve without this.

The Customer Driven Framework – Steps 6-10

**Apply Customer Intelligence to your product
development and marketing**

Armed with the extensive catalog of **Deep Customer Intelligence** you've gathered and organized with your end goal in mind, it's now time to shift our attention to applying it to develop breakthrough products, services, and marketing.

However, while the four Steps in the complete research process I just showed you are the same regardless of what your end goal may be, the Steps for creating a product, a service, or any form of marketing can vary considerably.

For example, my complete program on creating new products and services, **Breakthrough Product Development**, runs 105 pages. And a similar program I'm in the process of writing for creating superior marketing pieces will easily run closer to 200 pages.

So I can't possibly cover the complete details of both these processes in the room we have here.

But what I can do that you'll find extremely valuable is give you examples of exactly how the **Customer Driven Framework** was applied to create exceptional solutions for three of my clients. These real-world examples will give you a great launching pad for using in your own product and service development and creation of marketing that outperforms anything else you've ever used.

So let's dig in!

To refresh your memory, here are the steps in **LEVEL 2**:

LEVEL 2 – Apply Customer Intelligence to your product development and marketing

Can do any or all of these in any order you choose

Step 5: Develop new products or services

Step 6: Improve existing products or services

Step 7: Create a breakthrough business strategy

Step 8: Create an exceptional marketing strategy, lead, and hooks

Step 9: Create a powerful offer few prospects can say no to

Step 10: Create a process for making repeat sales to your existing customers

Step 11: Create an automated process for making repeat sales to your existing customers that can be scheduled to run with little or no maintenance, generating passive revenue week-in and week-out for years to come

As a quick reminder, the steps in **LEVEL 2** can be done in any order and you can do as many or as few as you'd like. Also, the steps that I've included here are by no means exhaustive.

This is a partial sampling of how you might apply the deep level of knowledge you now have of the experiences that drive your customers' buying decisions. The product development and marketing activities you could add here are practically endless, but this gives you a strong starting list.

So rather than go through each of the steps above in detail, which would take more room than we have here, in the following four examples, I'll highlight a few of these steps to demonstrate how the enriched knowledge base you now have can be used to substantially improve your product development and marketing efforts. And as I mentioned, I'll use real-life examples from clients I've worked with to illustrate how easy to apply and how profitable the **Customer Driven Framework** can be.

Customer Driven – Example #1

Developing new products and improving existing products

One of my most successful clients is a guy I met playing softball. For many years, my family attended an annual gathering of alumni from her college. Part of this event was an alumni and staff softball game.

Over the years, I became friends with one of the professors from my wife's college who was an excellent baseball player. On my best day, I'm a below-average baseball player. Nonetheless, he always invited me to be part of the teams he put together.

One day after a game, he told me about a perplexing problem he had with an advanced testing and assessment software suite he had developed. It had been used to prevent pilot error by the Federal Aviation Administration and operator error by the Nuclear Regulatory Commission. These were both areas where even small errors can have disastrous consequences.

The problem he was encountering was that in order to use the software, it required specialized hardware for each user. The content of each test question and all potential answers had to be coded into the machine, with different scores applied to each answer, depending on if it was entirely correct, partially correct, unanswered, or incorrect. So the complexities were considerable.

The hardware used was a special form of micro-computer that cost about \$4,500. And each test-taker needed their own micro-computer. Because most clients were potentially testing hundreds of people at a time, the expense was prohibitive. This made it extremely difficult for this powerful testing method to gain any real traction.

So I agreed to help try to solve this problem using the **Customer Driven Framework**. A couple weeks later, we met at the professor's office on the college campus, which was about a two-hour drive from my home.

As I mentioned earlier in this material, the questions you ask on your **Sideways Survey** always depend on the problem you're trying to solve or the goal you want to achieve and who the customer is. In this case, because my client's customers were large government entities, we set out to create a set of questions for senior employees of these entities.

So we prepared the four questions we were going to use and made a list of customers and senior government employees to send the Survey to. Each question was designed to determine what a customer's experience was and the good and bad features of other types of solutions they had considered.

One of the questions I suggested we include was, “What else is this scoring system like?” I thought that by doing this, we might find examples from other government entities who used specialized testing and were able to make it independent of any specialized hardware.

Then, something fortuitous happened.

After we had completed creating the survey questions, I got in my car to make the drive home. However, on the way home, I got stuck in a traffic jam on the freeway, caused by a multi-car accident. So I had nothing to do but move at a crawl for nearly four hours, which was practically twice as long as it would normally take to make the drive.

Somehow, I couldn’t get that one question out of my head, “What else is this scoring system like?”

Now, as I said, it was intended to see if other government entities had similar situations with specialized software and how they solved their problem. But then I started thinking about this on a broader scale, including what other non-technical government entities face a similar problem and how they may have solved it.

Within minutes, the answer popped into my head. As it turned out, I realized that the answer was much simpler than I thought.

Sometimes the best solutions are the simplest

There was one government entity that administered tens of thousands of tests across the United States every day. And the way they scored each test was brilliant in its simplicity.

The entity I’m talking about is the Department of Motor Vehicles. Back in those days, the written portion of a driving test was given using a booklet that contained all the questions and a scoring sheet with a hundred or so rows of answers, with each row corresponding to a question in the test booklet.

A test taker would read the question and all potential answers, then darken the circle on the scoring sheet that represented the answer they chose. They would continue to do this for each question until they had completed the test.

Now, the brilliant part was how each test was scored. Instead of arduously reading each question and each answer, the test administrator had a template with holes in the proper positions for the correct answers to each question. To quickly score any test, all the administrator had to do was lay the template over the score sheet.

If a given hole indicated that the circle beneath it had been darkened, the answer was correct. If the circle beneath a hole was blank, that question was answered incorrectly.

Most importantly, I realized that this was the potential solution to the professor's problem. In actuality, there was no need to code the content of each question and the details of each answer in order to score a question properly.

All that was needed was to know which position of the answer options corresponded to the correct answer. And an answer that was selected in the proper position was correct, with all other positions being incorrect.

Since I was still stuck in traffic, I called the professor and excitedly explained the potential solution I came up with, which I called a "blind engine". He agreed that this would solve the problem, eliminating the need for specialized hardware, and allowing tests using this software to be administered on any computer system or online.

As a consequence, with this major stumbling block removed, it now became easy to close more accounts. And eventually, the professor's company was acquired for just under \$120 million.

Customer Driven – Example #2

Create an exceptional marketing strategy, lead, and hooks

One of my clients had a training program that was presented once each quarter. Because the program included 12 months of follow-up with a trained coach, they could only train a maximum of 70 participants each time the program was presented.

To make things worse, at the price point they were charging, their profit margin was slim. So they were a bit desperate and faced with the decision of no longer offering this program.

However, when we applied the **Customer Driven Framework**, everything changed. Each question in their **Sideways Survey** yielded valuable ideas.

Discovering what their customers were experiencing that motivated them to investigate this training program and then enroll was quite valuable. As was seeing what other books and programs their customers were buying to get the results they were after.

But the question that really broke things open in this case was, “What single component of this training would make you NOT buy it if it was missing?”

Because their training was unique, highly acclaimed, and carried continuing education credits for their industry, they were certain the most valuable component would be some section of their content. And while a number of sections of their content were rated quite highly, their major discovery wasn’t related to their content at all.

The single most important component that was listed 70% of the time, which was far more frequently than anything else, was their added coaching. This came as a complete shock to my client, because when doing their conventional research, my client had been told by their customers that coaching would be a nice addition, but not necessarily a requirement.

However, because this information was gathered using conventional research methods, that opinion wasn’t based on actual experience. It was just that – an opinion. But once these customers experienced the quality of my client’s coaching, it was quite different than the opinion they had expressed earlier.

In fact, the coaching component was valued so highly by my client’s customers that the recurring theme they saw looked something like this:

“The one element I can’t do without is your coaching. With this level of support, you should be charging a lot more.”

“I’ve been in other programs that cost thousands more and didn’t receive this level of coaching. It’s by far the best I’ve experienced”.

What their **Sideways Survey** revealed was: (a) A high percentage of customers valued the coaching component more than any other component of this program; and (b) they indicated that the program is drastically underpriced.

The main take-aways from this included:

- The price of the program can easily be increased
- The marketing materials should put considerably more emphasis on the coaching component
- Adding additional coaching might present the opportunity to raise the price significantly

Using this Deep Customer Intelligence to create a new marketing strategy that increased revenue by 714%

Based on these findings, we then brainstormed strategies for positioning the product differently and raising the price considerably.

I felt that the program price could easily be doubled. It was currently priced at \$700 and I recommended testing a new price of \$1,500.

But my client had bigger ideas! They wanted to increase the price from \$700 all the way up to \$5,000.

I told them that this was a tall order and with a price increase of that magnitude, we’d have to do a number of things, including:

- Changing the name of the program. Because you can’t sell a program that was priced at \$700 with an increase in price to \$5,000 under the same name.
- This program would be better positioned as a 12-month coaching program, kicked off by an immersion training weekend – *not* as a weekend training with coaching support.
- We could increase the coaching component and perceived value of the program even more by including additional small “accountability groups” of 6 to 8 people. This would provide an additional level of support, allow group members to get to know each other,

and have a stronger sense that they're not in this alone. Plus, the majority of the small group support would be peer-to-peer, provided by the members of each group.

My client agreed and implemented this new strategy of a coaching-focused program, without any material change to the program itself. All that actually changed was the name of the program, adding the small accountability groups, and making this new strategy the core focus of all marketing materials.

As a result, all 70 seats, which was their upper limit, sold out. But now they sold out at \$5,000 per seat instead of \$700 per seat. That's a massive increase in revenue of 714%. And that increase has continued for every presentation of this program.

Customer Driven – Example #3

Create a powerful offer few people can say no to

A client of mine was an elite level college baseball player. He had offers for try outs from a number of major league teams. Unfortunately, he sustained permanent, irreversible damage to his knee in a skiing accident that ended his career in professional baseball before it started.

With his detailed knowledge of the game, he decided to open a training academy for highly talented high-school and college baseball players whose goal was to play in the major leagues. His offerings included in-person bootcamps and clinics, training DVDs, and in-person and online critiques of fundamental skills.

Sales were strong right from the start, due to my client's level of accomplishments and testimonials from high-school and college baseball players who had attended his training camps. In addition, he also had outstanding testimonials from a number of major league players who had made appearances at his training camps and saw the results for themselves.

Even with all of this going for him, my client's business seemed to reach its ceiling within a few years. And despite trying a number of different tactics, it seemed to be permanently stalled at a fixed level of revenue.

So we kicked the **Customer Driven Framework** into gear. Once we ran his **Sideways Survey**, we made a number of important discoveries. These included:

- Customers actually loved the structure and content of his programs, both in-person, on the training DVDs, and live and online critiques.
- The number one impediment for players at both high-school and college levels was knowing where to start. With training offered for so many different hitting, running, and fielding skills and in multiple formats, it was difficult to know which was the best way to start.
- Players who only played a single position – such as shortstop, first base, or pitcher – felt that some or most of a given training was too broad and didn't pertain to them. In other words, the experience was less than ideal.

Based on these findings, it was clear that the quality of the training was excellent and didn't need to be improved. What did need improving was how the training was organized and presented. And how my client's offer could be improved to clearly convey that.

And here's an important point. It wasn't the quality of his products that was limiting his sales. It was the negative *experience* and perception that prospects had that needed to be

corrected in order to take his sales to the next level. And this is something he never would have discovered without the results produced by his **Sideways Survey**.

The incredible value of improving your offer

Like so many companies, the problem with my client's offer was that he was trying to be all things to all prospects. And this ends up creating an overly bloated offer that doesn't directly appeal to anyone.

So the first thing we determined needed changing was his lead magnet. We replaced his existing lead magnet of "A College All Star's Guide to Better Hitting, Fielding, Running, and Pitching" to "A College All Star's Guide to the Physical Training and Mental Skills Needed to Make It in Major League Baseball".

This new subject material, while being general in nature, was still very focused. And most importantly, it was applicable to every player at every position. Most importantly, it avoided presenting a lot of extraneous material that didn't apply to most of the people who opted-in to receive it.

Next, we made the offer of this lead magnet the only content available on his home page. Instead of a long list of content like my client's biography... sample videos... featured testimonials from satisfied students... featured testimonials from professional ball players... links to his clinics, training programs, and DVDs... and all the other clutter you find on most home pages, the only content on his home page was the offer of this free report.

Why?

Because 90% of my client's prospects came from paid ads on Google and Facebook, which gets expensive. So the main objective was to capture the contact information of as many of these prospects as possible and add them to my client's subscriber list. He could then grow his sales with targeted follow-ups to his list.

By doing this, if you capture 30% more of the prospects who visit your website and your conversion rates remain the same, you should now make a matching 30% more sales.

Next, we reorganized all of his training camps, DVDs, and online clinics and critiques into five distinct and separate categories:

1. Hitting and base running
2. Fielding skills for infielders

3. Fielding skills for outfielders
4. Pitching skills and game strategy for pitchers
5. Fielding skills and game strategy for catchers

In addition, most of these categories had offerings at different levels: beginner, intermediate, and advanced.

By implementing these changes, based solely on what my client's customers *experience* when using his products, his offers for his lead magnet and these more individualized programs, were improved dramatically.

Now, the strategy behind his offers was to use a set of skills that appealed to players of all positions as his lead magnet, then home in on the specific skills that players at each position were interested in with no additional baggage.

As a result of offering a far more appealing lead magnet and making that the only content on my client's home page, his opt-ins of new subscribers increased by slightly more than 500%. This is obviously massive, but I've rarely seen this strategy result in less than 75% more opt-ins.

Then, because the offers for each training program, regardless of the format it was delivered in, now focused on a specific skill set only, his conversions increased by another 30%.

So bottom line, by using what he discovered about how his customers truly experience his product, he was able to change his offer for both his lead magnet and his products, better serve players at each position, and produce an enormous increase in sales of 530%.

Customer Driven – Example #4

Using what your customers have already told you, but you can't hear, to sell more in 6 days than you normally sell in a month

Customer Driven feedback can come in many forms. Some are less obvious than others, but they are actually staring you in the face.

The fact is, your customers have already spoken in the most clear manner possible. They've told you in no uncertain terms what they want to buy – and what they want to buy more of.

So let's take a quick look at exactly *how* they've spoken, what they're saying, and how to turn this into more sales in 6 days than you normally make in a month.

Whenever I start working with a new client, one of the first things I ask is what their best-selling product or service is and how much better it sells than their other products or services. For nearly every company, this is easy to answer.

But when I ask them if they're explicitly promoting their best seller on a regular basis, most companies admit that they're not. And to make it worse, because a product or service is their best-seller, many companies actually ignore it, assuming that its sales growth will take care of itself.

As you're about to see, this is a huge mistake.

Creating a small windfall from a near-dead list of 2,300 subscribers

When I recently met with a new client for the first time, I started off by asking them my standard question, "What is your best-selling product?"

He immediately told me what that product is, so I followed up with, "How often to you make an explicit offer of this product to your list?"

His answer was fairly typical as he described a process of rotating promotions for a series of his company's products. For a couple of months, they would focus on promoting one product. The next couple months, they would focus on a different product. And this pattern would continue for 5 or 6 of their products.

My next question was, “Does this rotation change your sales in a significant way, so that one of your other products replaces your best-seller and becomes the new best-seller?”

He answered that there was no material change. And their best-seller was never displaced by another product.

When I then suggested that he stop promoting their other products as frequently as they do, and replace at least 50% of those promotions with more promotions for their best-selling product, I thought there was a glitch that caused our Zoom call to freeze. But it turned out that he just went silent for a number of minutes.

Now, we were on Zoom, so I can’t say for sure, but it looked like his face was turning redder and redder during those few minutes. Finally, he broke the silence and raising his voice, he told me, “We can’t do that! Especially not now, because we just finished the promotion for this product last week. People would think I’m an idiot if we promoted it again!”

Overcoming this problem by “marketing to yourself”

Here’s why my client’s assumption couldn’t be more off the mark. Think about all the emails you received yesterday. Just yesterday.

Of all those emails, how many do you remember? If you’re like most people, the answer is none. And the same goes for all your subscribers. So it’s a mistake to assume that people will remember your email promotion or be offended by seeing it again.

When I explained this to my client and he agreed that he didn’t remember any of the emails he had recently received, he was still reluctant to re-offer his best product to his list. So I suggested we conduct a small test before mailing his entire list.

He agreed to this, but with a twist. You see, the segment he wanted to test with was 2,300 people he was getting ready to delete from his list! But I agreed, because I’ve seen this simple process work so well so many times before.

We then set up a series of 3-emails with a sequence of: (a) the initial notice; (b) a reminder two days later; and (c) a final notice two days after that. So the entire sequence ran over a period of 5 days, with sales continuing to come in on the sixth day as well.

And the results were just as I had promised. Over that 6-day stretch, this simple campaign brought in \$98,800 in sales. Sales my client never would have seen without this.

Expanding your results with this simple process

It's critical to remember that your customers are telling you on a daily basis what they want to buy more of. All you have to do is listen – by checking your sales records – and then sell them more of what they already buy the most.

Plus, if you want to take this to the next level, it's important to also keep in mind that people remember few, if any, of the emails they received even yesterday. So you can comfortably promote your best-selling product far more frequently without any fear of offending your subscribers.

This can be leveraged to generate even more sales on a continuing, scheduled basis. All you have to do is schedule the exact same sequence of emails for your best-selling product to be sent out once every quarter. And you can even do this once each month.

One of my clients, a cosmetic orthodontist, took in \$60,000 in sales the first time he sent out this type of promotion to his list. This was more revenue, which was produced in just 6 days, then he normally made in a full month.

So he began sending out the same email sequence every month, with just occasional, minor variations to the copy. This has continued every month for more than 8 years. And it never fails to create a rush of new sales.

Conclusion

The end... or the beginning?

I hope you've enjoyed this unique approach to developing products, services, and marketing that gives you a clear and powerful advantage in your market.

My goal is to show you that there is a much more dependable and profitable way to develop products and services that deliver the *experience* your customers really want. And create marketing that accurately speaks to your customer's *experience*, resulting in the ability to make substantially more sales.

Now, before I go, I want to leave you with one final piece of advice. Probably the most important advice in this entire program.

The process you've just discovered for using the **Customer Driven Framework** can be the end of your exploration of a better way to develop products, services and marketing. You can look at this as an enjoyable learning experience and stop here.

Or it can be just the beginning...

You can take what you've discovered and start applying it today. As you've already seen, it doesn't take much to do this. The core process is easy to understand and implement.

But it does take a commitment to implement it.

Of course, this is the cornerstone of all momentum. You can't really achieve any goal unless you commit to implementing the steps to achieve it.

This is simple logic, but also very commonly dismissed. It's so easy to put something off until next week or next month.

But we all know that those things that get put off rarely get done. They simply wither away in a to-do file somewhere.

Now at this point, most people would typically urge you to commit to taking action now. But I'm not going to do that.

The way I see it, you either “got” this powerful new approach or you didn’t. If you did, then you don’t need much urging to take action on it.

So instead, I’ll leave you with my true hope that you did get it. And that you’ll soon be creating the kinds of products, services, and marketing that other companies can only dream of.

You’ll soon be able to fulfill all of your customers’ wants and needs in a way that no other product or marketing can, giving you the clear leadership position in your market without a challenger in sight.

About Bob Serling



Bob Serling is a 35-year marketing, product development, and licensing veteran and the founder of LicensingLab. His innovative take on marketing, product development, and licensing has helped thousands of businesses and entrepreneurs produce exceptional results.

Bob has been the monthly marketing columnist for Success Magazine... invented a skateboard toy featuring Tony Hawk's branding that was sold in toy stores and department stores all over the world... co-created and licensed advanced assessment software currently being used by many Fortune 500 companies... created a one-and-a-half page prospecting letter for a client that landed an agreement for a \$25 million project by being sent to just one prospect – then licensed that same letter to 14 different industries... and much more.

He's perhaps best known for having pioneered the process of customer-driven product and marketing development, the **Customer Driven Framework**. This proprietary method shifts the focus of product and marketing development from company-driven "features and benefits" to using actual customer experience and buying history to develop exceptional products and marketing that give you a powerful competitive advantage.

Bob offers a range of product development and marketing solutions to fit any company's budget – from courses, to group trainings, and 1-to-1 consulting. To schedule a short call by Zoom and have Bob help you identify the most profitable options for developing or improving your product or marketing, just send an email to:

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