Proposed Customer Research Plan and Actionable Strategy

AI-Powered Financial Insights Tool

Introduction

This document outlines the proposed customer research plan for an AI-powered financial insights tool. The survey, hosted on JotForm, has been designed to gather critical insights from potential users. These insights will help validate assumptions, prioritize product features, and refine the overall user experience. While the survey is yet to be run, the structured approach to customer research will be used to inform key design and feature decisions.

The goal of this plan is to showcase product management skills in research, user validation, and strategic planning.

Survey Overview

Objective:
The objective is to gather data that helps validate user preferences, pain points, and feature needs for the AI-powered financial insights tool, focusing on areas like content personalization, interactivity, and user concerns regarding AI-generated content.

Target Audience:
The survey targets retail investors, students, and financial news enthusiasts. Their input will guide feature prioritization and product design.

Survey Platform:
The survey is hosted on JotForm, and responses will be analyzed to shape the product's roadmap.

Proposed Survey Questions

[FinAI Pre-Launch Survey](). These questions focus on understanding user behaviors, preferences for content personalization, and trust in AI-generated financial insights.

Proposed Action Plan Based on Survey Insights

While the survey has not been run, the proposed questions aim to provide insights into user preferences and pain points. Based on these anticipated responses, here is a proposed plan of action:

1. Personalization and Interactivity

- **Action**: Implement customizable newsletters that allow users to adjust content based on their interests. Interactivity (e.g., prompts) should be available as an option.
- **Justification**: Responses related to personalization, interactivity, and prompts will help shape the AI-driven customization features of the tool.

2. Content Format and Frequency

- **Action**: Offer multiple content formats (text, infographics, video) and flexible delivery frequencies (daily, weekly, etc.), depending on user preferences.
- **Justification**: Responses related to content format and newsletter frequency will guide how often and in what format to send AI-generated insights.

3. Feature Prioritization

- **Action**: Prioritize features like stock market updates, personalized investment strategies, and company earnings reports based on the most-selected topics in the survey.
- **Justification**: Understanding the most important topics will inform what data the AI focuses on generating and delivering.

4. Trust and Security Concerns

- **Action**: Address concerns about accuracy, bias, and security of AI-generated content by implementing transparency in the AI's decision-making and citing reputable data sources.
- **Justification**: Survey responses related to trust in AI will shape the messaging and how the tool manages user confidence.

5. Monetization and Business Model

- **Action**: Use the survey data to finalize the pricing structure (free, freemium, or premium) based on the number of users willing to pay for AI-driven financial news.
- **Justification**: Insights from the survey's question on willingness to pay will guide the final pricing strategy.

Demonstrated Product Management Skills

This research and proposed plan of action highlight core product management skills, including:

- **Customer Research and Validation**: Designing a detailed survey to gather user insights.
- **Data-Driven Decision-Making**: Anticipating how user responses will drive feature prioritization and design choices.
- **User-Centered Design**: Ensuring that the tool is customizable and interactive, addressing user pain points.
- **Strategic Thinking**: Developing an actionable plan for platform development, content customization, and monetization based on anticipated survey responses.

Conclusion

This report showcases a thorough and strategic approach to customer research, emphasizing personalization, interactivity, and AI-generated insights. Although the survey is yet to be run, the questions and proposed action plan demonstrate the ability to gather user feedback, make data-driven decisions, and deliver a product that meets real customer needs.