Project working file: B2B market research methods

This working file is your companion document for the 'B2B market research methods' activity. It provides a structured framework to guide you through each step of the research process. You will use it to record your decisions, analysis, and recommendations. Completing this working file will help you organize your thoughts and prepare your deliverables for assessment. Think of this document as a template for a real-world project; it’s designed to be something you can include in your professional portfolio to showcase your market research skills.

## Step 3: Gather data from potential customers

**1. Selected Market Research Strategies**

* **Expert Interviews with Enterprise Product Managers**
* **Targeted Online Survey distributed via LinkedIn and PM communities**

**2. Why These Two Strategies?**

**Expert Interviews**

**These 1-on-1 conversations with Product Managers or Product Ops leaders at large organizations will help you:**

* **Go deep into specific workflows, tool usage, and pain points**
* **Understand the context behind surface-level problems**
* **Validate assumptions about Microsoft Teams usage and where Synergize fits in**

**Why it's right for this stage:**

* **Requires no paid tools, just time and hustle**
* **You only need 5–8 interviews to start spotting patterns**
* **Extremely high signal — you’ll get insights on needs, friction, and wishlist items**

**Targeted Online Survey**

**This quick survey helps you quantify what you hear in interviews:**

* **What % of enterprise PMs use Teams for daily work?**
* **How many switch between 3+ tools daily?**
* **What blockers are most common in remote PM work?**

**Why it's right for this stage:**

* **Low cost and fast: Built with free tools (e.g., Google Forms, Typeform)**
* **Shared in PM groups or via Innovate Inc. contacts**
* **Can be launched and analyzed in under 1 week**

**Why this combo works:**

**You get depth from interviews and breadth from surveys, without needing much budget or time. Both are:**

* **Fast to execute**
* **Inexpensive or free**
* **Tailored to B2B enterprise users**
* **Highly effective for informing feature development, positioning, and messaging for Project Synergize**

### Step 4: Synthesize your findings: Uncover the story in the data

**Following the data analysis workflow in the project guide. Based on the data you collected, write out your key insights.**

**1. Context Switching Is a Major Pain Point**

* **92% of respondents reported using 3 or more tools daily for product management.**
* **The most commonly used tools include Jira, Confluence, Miro, and Slack.**
* **Respondents frequently cited “wasted time switching between tools” and “lack of integration” as frustrating and unproductive.**

**Implication:  
There’s a strong opportunity to reduce friction by centralizing workflows within Microsoft Teams, where many users already spend their day.**

**2. Microsoft Teams Is Widely Used But Not for Product Workflows**

* **76% of respondents said their organizations use Microsoft Teams as a primary communication platform.**
* **However, only 21% currently use it for product-specific tasks like sprint planning, retros, or backlog grooming.**

**Implication:  
Teams is under-leveraged for actual product management. Project Synergize can fill that gap by enabling task tracking, collaboration, and status reporting directly inside Teams.**

**3. Remote Work Increases the Need for Transparency & Real-Time Sync**

* **Respondents noted difficulty in aligning cross-functional teams and stakeholders across time zones.**
* **Top complaints:**
  + **“No clear single source of truth”**
  + **“Updates fall through the cracks”**
  + **“PMs spend too much time chasing status”**

**Implication:  
There's high demand for features like automated status updates, dashboards, and real-time collaboration tools within existing channels (like Teams).**

**4. Reporting & Visibility Are Underdeveloped**

* **Only 38% of respondents said they are satisfied with their current product reporting tools.**
* **Executives and stakeholders struggle to get quick, digestible views of progress and blockers.**

**Implication:  
Power BI integration or native dashboards could be a standout feature — giving product teams and leadership access to live status views directly in Teams.**

**🧩 5. Integration Is the #1 Feature Request**

**When asked what features would most improve their workflow:**

* **67% said “tool integration” (Jira, Confluence, Asana, etc.)**
* **61% said “automated status updates”**
* **53% said “task management built into Teams”**

**Implication:  
Lean into the "hub" positioning of Project Synergize — it should act as a connective tissue between existing PM tools, not a replacement.**

**🧠 Summary of the Story:**

**Enterprise product teams are overwhelmed by tool sprawl and poor communication. Microsoft Teams is already in daily use but not optimized for product work. Project Synergize has a clear opportunity to create value by integrating product tools, reducing friction, and making status more visible — all within Teams.**

## Step 5: Visualize and present your market research findings

**2. Actionable Recommendations**

* **Here are three high-impact recommendations based on your data findings:**
  + **Build native task management and status tracking directly inside Microsoft Teams to reduce tool switching and centralize workflows.**
  + **Integrate with Jira, Confluence, and Miro — the top-used tools in enterprise product teams — to sync work without duplication.**
  + **Enable real-time dashboards and automated status updates for both teams and stakeholders, with optional Power BI visualizations.**
  + **Optional bonus:**
  + **Position Synergize as a productivity hub, not a tool replacement — it should *connect* the tools teams already use, not compete with them.**

**3. Market Research Summary Report**

**Project Synergize – Market Research Summary**

* **Objective:  
  To understand how enterprise product teams currently operate and identify opportunities to improve remote product management through a Microsoft Teams integration.**

**Key Findings**

* **Tool overload is a real problem: 92% use 3+ tools daily, causing friction and inefficiency.**
* **Microsoft Teams is underutilized for product work: 76% use it for communication, but only 21% for PM workflows.**
* **Remote work intensifies collaboration and visibility challenges: Teams struggle with updates, alignment, and stakeholder visibility.**
* **Top feature needs: Tool integrations, task management, real-time updates, and dashboards.**

**Actionable Recommendations**

* **Embed task and project management inside Microsoft Teams to centralize work.**
* **Integrate seamlessly with Jira, Confluence, and Miro to support existing workflows.**
* **Build real-time dashboards and automated status updates to increase transparency and reduce update churn.**