**CustomerMindIQ Productivity**

**& Workflow Prompts**

**GETTING STARTED PROMPTS (First 30 Days)**

**Setup Sequence Prompts**

**Prompt 1: "What data sources should I connect first for the biggest impact?"** **Purpose:** Prioritize initial setup for maximum value **Expected response:** Suggests connecting CRM first, then email marketing, then website analytics based on business type **Action:** Guides users through logical setup sequence

**Prompt 2: "Show me the 5 most important dashboards for my business type"** **Purpose:** Focus on relevant features immediately **Expected response:** Customized dashboard recommendations (e.g., SaaS: Customer Health, MRR, Churn Prediction) **Action:** Creates personalized workspace for efficiency

**Prompt 3: "What baseline metrics should I establish before making changes?"** **Purpose:** Document starting point for measuring improvement **Expected response:** Lists current conversion rates, churn rates, customer acquisition costs **Action:** Establishes measurement framework for ROI tracking

**DAILY MONITORING PROMPTS**

**Morning Review Prompts**

**Prompt 4: "What needs my immediate attention today?"** **Purpose:** Surface urgent issues requiring same-day action **Expected response:** Lists customers at high churn risk, failed campaigns, website issues, or revenue anomalies **Action:** Prioritizes daily workflow based on business-critical issues

**Prompt 5: "Show me yesterday's performance against targets"** **Purpose:** Quick daily performance check **Expected response:** Key metrics vs. goals with red/yellow/green status indicators **Action:** Provides fast daily health check without deep analysis

**Prompt 6: "Which customers should I reach out to today?"** **Purpose:** Proactive customer management **Expected response:** Lists at-risk customers, expansion opportunities, or milestone celebrations **Action:** Drives daily customer success activities

**End-of-Day Prompts**

**Prompt 7: "What patterns emerged in today's data?"** **Purpose:** Identify daily trends and anomalies **Expected response:** Unusual spikes, drops, or patterns in customer behavior or website traffic **Action:** Spots emerging issues or opportunities early

**Prompt 8: "Set tomorrow's priorities based on today's data"** **Purpose:** Data-driven next-day planning **Expected response:** Recommended focus areas based on current trends and issues **Action:** Optimizes next-day productivity and focus

**WEEKLY ANALYSIS PROMPTS**

**Monday Planning Prompts**

**Prompt 9: "What should I focus on this week to move the needle?"** **Purpose:** Weekly priority setting based on impact potential **Expected response:** 2-3 high-impact initiatives with projected business impact **Action:** Focuses weekly efforts on highest-ROI activities

**Prompt 10: "Show me last week's wins and areas needing attention"** **Purpose:** Learn from recent performance **Expected response:** Successful initiatives to replicate and problems requiring intervention **Action:** Guides weekly strategy based on recent learnings

**Friday Review Prompts**

**Prompt 11: "Summarize this week's business performance trends"** **Purpose:** Weekly performance assessment **Expected response:** Key metric trends, significant changes, and their implications **Action:** Provides weekly business health assessment

**Prompt 12: "What experiments should I run next week?"** **Purpose:** Continuous optimization planning **Expected response:** A/B test suggestions based on current performance gaps **Action:** Maintains momentum on continuous improvement

**MONTHLY STRATEGIC PROMPTS**

**Month-End Analysis Prompts**

**Prompt 13: "What are the top 3 opportunities to grow revenue next month?"** **Purpose:** Monthly growth planning **Expected response:** Specific initiatives with projected revenue impact and implementation difficulty **Action:** Focuses monthly planning on highest-impact growth opportunities

**Prompt 14: "Which initiatives from last month delivered the best ROI?"** **Purpose:** Learn from successful initiatives **Expected response:** Ranked list of initiatives by actual ROI with lessons learned **Action:** Guides future initiative selection and resource allocation

**Prompt 15: "What warning signs suggest I should change strategy?"** **Purpose:** Strategic course correction **Expected response:** Trends indicating need for strategic pivots or major adjustments **Action:** Prevents continued investment in failing strategies

**IMMEDIATE ATTENTION PROMPTS**

**Crisis Detection Prompts**

**Prompt 16: "Alert me to any data anomalies that could indicate serious problems"** **Purpose:** Early warning system for business issues **Expected response:** Unusual patterns in churn, conversion, or customer behavior that warrant investigation **Action:** Enables rapid response to emerging problems

**Prompt 17: "Show me customers with sudden behavior changes"** **Purpose:** Relationship risk management **Expected response:** Customers showing dramatic engagement drops or usage pattern changes **Action:** Triggers immediate customer outreach and intervention

**Prompt 18: "What revenue-critical issues need fixing this week?"** **Purpose:** Revenue protection prioritization **Expected response:** Issues directly impacting revenue generation or retention **Action:** Focuses resources on revenue-protecting activities

**Opportunity Alerts**

**Prompt 19: "Which customers are showing expansion signals right now?"** **Purpose:** Revenue expansion opportunity capture **Expected response:** Customers with increased usage, engagement, or purchase behavior **Action:** Triggers timely upselling and expansion conversations

**Prompt 20: "What quick wins could I implement today?"** **Purpose:** Immediate value creation **Expected response:** Low-effort, high-impact changes that can be implemented same-day **Action:** Drives immediate improvements and maintains momentum

**WORKFLOW OPTIMIZATION PROMPTS**

**Process Efficiency Prompts**

**Prompt 21: "Show me my most time-consuming data analysis tasks"** **Purpose:** Identify automation opportunities **Expected response:** Reports and analyses that take significant time but could be automated **Action:** Streamlines workflow through automation setup

**Prompt 22: "What routine decisions could CustomerMindIQ make automatically?"** **Purpose:** Decision automation opportunities **Expected response:** Routine decisions like campaign adjustments or alert thresholds **Action:** Reduces manual decision-making burden

**Prompt 23: "Create my personalized daily dashboard"** **Purpose:** Workspace optimization **Expected response:** Custom dashboard showing only metrics relevant to user's role and priorities **Action:** Eliminates information overload and improves focus

**Performance Tracking Prompts**

**Prompt 24: "How much time is CustomerMindIQ saving me versus manual analysis?"** **Purpose:** ROI quantification **Expected response:** Time savings calculation with monetary value **Action:** Validates platform investment and identifies additional automation opportunities

**Prompt 25: "What insights am I getting now that I couldn't see before?"** **Purpose:** Value realization assessment **Expected response:** New insights and capabilities gained through unified data platform **Action:** Reinforces platform value and identifies underutilized features

**ONBOARDING SEQUENCE PROMPTS**

**Week 1: Foundation**

**"Walk me through connecting my first three data sources"** **"Show me my business health score and what it means"** **"What are the five most important metrics for my business type?"**

**Week 2: Exploration**

**"What patterns do you see in my customer data?"** **"Which marketing channels are performing best and worst?"** **"Show me where I'm losing potential revenue"**

**Week 3: Optimization**

**"What's the fastest way to improve my worst-performing metric?"** **"Which customers should I focus on retaining this month?"** **"What A/B tests should I run first?"**

**Week 4: Advanced Features**

**"How can I automate my biggest time-consuming tasks?"** **"What competitive intelligence should I be tracking?"** **"Set up my ideal weekly review process"**

**TROUBLESHOOTING PROMPTS**

**Data Issues**

**"Why don't my numbers match what I see in [other tool]?"** **"What could cause sudden changes in my metrics?"** **"Help me validate that my data connections are working correctly"**

**Performance Questions**

**"Why isn't this feature working as expected?"** **"What am I missing in my analysis?"** **"How do I interpret conflicting data signals?"**

**IMPLEMENTATION SCHEDULE**

**Daily (5 minutes)**

* Morning: "What needs immediate attention?"
* Evening: "What patterns emerged today?"

**Weekly (30 minutes)**

* Monday: "What should I focus on this week?"
* Friday: "Summarize this week's performance"

**Monthly (2 hours)**

* Month-end: "Top 3 growth opportunities next month?"
* Strategic review: "What warning signs suggest strategy changes?"

**As-Needed**

* Crisis prompts when alerts trigger
* Opportunity prompts when expansion signals detected
* Workflow prompts during quarterly planning

These prompts create a structured approach to using CustomerMindIQ efficiently while ensuring focus on high-impact activities and maintain consistent business monitoring routines.