# AI Agents for B2B Customer Research

Synthesize interviews, calls, surveys, and support tickets into buying insights.

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**For: B2B founders, product marketers, researchers, and growth teams**

**Opportunity Score: 63**

**Minimum target: 95 pages**

**Generated edition: 100 pages**

**EBOOK-055**

# Rights and Use

This ebook is a generated implementation draft designed for editorial development, product packaging, and publishing preparation.

Review all examples, claims, compliance-sensitive language, and business-specific recommendations before public sale or distribution.

### Use this page to:

- Confirm that the promise matches the buyer's real workflow.
- Add original examples, screenshots, and templates before launch.
- Keep human review in place for customer-facing or regulated outputs.

# How to Use This Ebook

Read this guide as a build sequence. Each section turns the broad idea of AI agents into a practical operating decision.

The best result comes from applying the pages to one real workflow first, then repeating the pattern across related processes.

### Use this page to:

- Mark the pages that define your first pilot.
- Translate each page action into a task in your project tool.
- Use the final checklist before packaging the ebook for sale.

# Table of Contents

Cover 1

Rights and use 2

How to use this ebook 3

Opportunity snapshot 5

Part 1: Market and Workflow Fit 6

Part 2: Workflow Selection and Mapping 18

Part 3: Knowledge Pack 30

Part 4: Prompt Stack 42

Part 5: Build and Integration 54

Part 6: Quality, Risk, and Review 66

Part 7: Launch, Metrics, and Optimization 78

Part 8: Templates, Worksheets, and Sprint Plan 90

Closing implementation page 100

# Opportunity Snapshot

**TITLE**
AI Agents for B2B Customer Research

**SUBTITLE**
Synthesize interviews, calls, surveys, and support tickets into buying insights.

**TARGET AUDIENCE**
B2B founders, product marketers, researchers, and growth teams

**NICHE**
B2B customer research

**PRIMARY OUTCOME**
Create agents for evidence collection, theme clustering, objection mapping, and insight briefs.

**POSITIONING**
Market intelligence guide for teams selling complex products.

**RECOMMENDED BUNDLE**
B2B Research Agent Bundle

## Top keyword themes

- b2b customer research
- b2b customer research ai agents
- b2b customer research automation
- b2b customer research workflow
- b2b customer research playbook
- b2b customer research guide
- b2b customer research templates

# Part 1: Market and Workflow Fit

A new implementation section begins here.

## The buyer situation

This section applies the buyer situation to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to the buyer situation.
- Define the exact trigger that starts this workflow. Apply it specifically to the buyer situation.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to the buyer situation.
- Name the human reviewer and the decision they still own. Apply it specifically to the buyer situation.
- Write the output format before connecting tools or automations. Apply it

**Page action**

Write one sentence that explains how 'The buyer situation' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Where time leaks appear

This section applies where time leaks appear to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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SEO and positioning cue for this page: b2b customer research templates. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to where time leaks appear.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to where time leaks appear.
- Name the human reviewer and the decision they still own. Apply it specifically to where time leaks appear.
- Write the output format before connecting tools or automations. Apply it specifically to where time leaks appear.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to where time leaks appear.

**Page action**

Write one sentence that explains how 'Where time leaks appear' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# High-value repeated work

This section applies high-value repeated work to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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SEO and positioning cue for this page: b2b ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to high-value repeated work.
- Name the human reviewer and the decision they still own. Apply it specifically to high-value repeated work.
- Write the output format before connecting tools or automations. Apply it specifically to high-value repeated work.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to high-value repeated work.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to high-value repeated work.

**Page action**

Write one sentence that explains how 'High-value repeated work' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Human judgment boundaries

This section applies human judgment boundaries to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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SEO and positioning cue for this page: research ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to human judgment boundaries.
- Write the output format before connecting tools or automations. Apply it specifically to human judgment boundaries.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to human judgment boundaries.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to human judgment boundaries.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to human judgment boundaries.

**Page action**

Write one sentence that explains how 'Human judgment boundaries' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# First workflow scorecard

This section applies first workflow scorecard to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: research ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to first workflow scorecard.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to first workflow scorecard.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to first workflow scorecard.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to first workflow scorecard.
- Define the exact trigger that starts this workflow. Apply it specifically to first workflow scorecard.

**Page action**

Write one sentence that explains how 'First workflow scorecard' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Before-and-after operating model

This section applies before-and-after operating model to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to before-and-after operating model.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to before-and-after operating model.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to before-and-after operating model.
- Define the exact trigger that starts this workflow. Apply it specifically to before-and-after operating model.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to before-and-after operating model.

**Page action**

Write one sentence that explains how 'Before-and-after operating model' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Stakeholder expectations

This section applies stakeholder expectations to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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SEO and positioning cue for this page: b2b customer research. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to stakeholder expectations.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to stakeholder expectations.
- Define the exact trigger that starts this workflow. Apply it specifically to stakeholder expectations.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to stakeholder expectations.
- Name the human reviewer and the decision they still own. Apply it specifically to stakeholder expectations.

**Page action**

Write one sentence that explains how 'Stakeholder expectations' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Risk and trust screen

This section applies risk and trust screen to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: research ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to risk and trust screen.
- Define the exact trigger that starts this workflow. Apply it specifically to risk and trust screen.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to risk and trust screen.
- Name the human reviewer and the decision they still own. Apply it specifically to risk and trust screen.
- Write the output format before connecting tools or automations. Apply it specifically to risk and trust screen.

**Page action**

Write one sentence that explains how 'Risk and trust screen' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Simple value calculation

This section applies simple value calculation to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to simple value calculation.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to simple value calculation.
- Name the human reviewer and the decision they still own. Apply it specifically to simple value calculation.
- Write the output format before connecting tools or automations. Apply it specifically to simple value calculation.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to simple value calculation.

**Page action**

Write one sentence that explains how 'Simple value calculation' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Workflow owner decision

This section applies workflow owner decision to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to workflow owner decision.
- Name the human reviewer and the decision they still own. Apply it specifically to workflow owner decision.
- Write the output format before connecting tools or automations. Apply it specifically to workflow owner decision.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to workflow owner decision.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to workflow owner decision.

**Page action**

Write one sentence that explains how 'Workflow owner decision' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Pilot scope definition

This section applies pilot scope definition to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to pilot scope definition.
- Write the output format before connecting tools or automations. Apply it specifically to pilot scope definition.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to pilot scope definition.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to pilot scope definition.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to pilot scope definition.

**Page action**

Write one sentence that explains how 'Pilot scope definition' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 1 review checklist

This section applies part 1 review checklist to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to part 1 review checklist.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to part 1 review checklist.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to part 1 review checklist.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to part 1 review checklist.
- Define the exact trigger that starts this workflow. Apply it specifically to part 1 review checklist.

**Page action**

Write one sentence that explains how 'Part 1 review checklist' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 2: Workflow Selection and Mapping

A new implementation section begins here.

## Trigger and input map

This section applies trigger and input map to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research workflow. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to trigger and input map.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to trigger and input map.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to trigger and input map.
- Define the exact trigger that starts this workflow. Apply it specifically to trigger and input map.
- Collect two strong examples and one weak example before writing prompts

**Page action**

Write one sentence that explains how 'Trigger and input map' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Output definition

This section applies output definition to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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SEO and positioning cue for this page: b2b customer research. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to output definition.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to output definition.
- Define the exact trigger that starts this workflow. Apply it specifically to output definition.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to output definition.
- Name the human reviewer and the decision they still own. Apply it specifically to output definition.

**Page action**

Write one sentence that explains how 'Output definition' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Review checkpoint design

This section applies review checkpoint design to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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SEO and positioning cue for this page: b2b ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to review checkpoint design.
- Define the exact trigger that starts this workflow. Apply it specifically to review checkpoint design.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to review checkpoint design.
- Name the human reviewer and the decision they still own. Apply it specifically to review checkpoint design.
- Write the output format before connecting tools or automations. Apply it specifically to review checkpoint design.

**Page action**

Write one sentence that explains how 'Review checkpoint design' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Escalation path

This section applies escalation path to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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SEO and positioning cue for this page: b2b customer research. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to escalation path.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to escalation path.
- Name the human reviewer and the decision they still own. Apply it specifically to escalation path.
- Write the output format before connecting tools or automations. Apply it specifically to escalation path.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to escalation path.

**Page action**

Write one sentence that explains how 'Escalation path' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Data source inventory

This section applies data source inventory to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to data source inventory.
- Name the human reviewer and the decision they still own. Apply it specifically to data source inventory.
- Write the output format before connecting tools or automations. Apply it specifically to data source inventory.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to data source inventory.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to data source inventory.

**Page action**

Write one sentence that explains how 'Data source inventory' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Handoff format

This section applies handoff format to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to handoff format.
- Write the output format before connecting tools or automations. Apply it specifically to handoff format.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to handoff format.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to handoff format.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to handoff format.

**Page action**

Write one sentence that explains how 'Handoff format' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Process bottleneck scan

This section applies process bottleneck scan to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to process bottleneck scan.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to process bottleneck scan.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to process bottleneck scan.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to process bottleneck scan.
- Define the exact trigger that starts this workflow. Apply it specifically to process bottleneck scan.

**Page action**

Write one sentence that explains how 'Process bottleneck scan' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Automation readiness score

This section applies automation readiness score to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research workflow. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to automation readiness score.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to automation readiness score.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to automation readiness score.
- Define the exact trigger that starts this workflow. Apply it specifically to automation readiness score.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to automation readiness score.

**Page action**

Write one sentence that explains how 'Automation readiness score' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Current tool map

This section applies current tool map to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research templates. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to current tool map.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to current tool map.
- Define the exact trigger that starts this workflow. Apply it specifically to current tool map.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to current tool map.
- Name the human reviewer and the decision they still own. Apply it specifically to current tool map.

**Page action**

Write one sentence that explains how 'Current tool map' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Failure pattern inventory

This section applies failure pattern inventory to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to failure pattern inventory.
- Define the exact trigger that starts this workflow. Apply it specifically to failure pattern inventory.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to failure pattern inventory.
- Name the human reviewer and the decision they still own. Apply it specifically to failure pattern inventory.
- Write the output format before connecting tools or automations. Apply it specifically to failure pattern inventory.

**Page action**

Write one sentence that explains how 'Failure pattern inventory' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Minimum useful workflow

This section applies minimum useful workflow to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research workflow. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to minimum useful workflow.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to minimum useful workflow.
- Name the human reviewer and the decision they still own. Apply it specifically to minimum useful workflow.
- Write the output format before connecting tools or automations. Apply it specifically to minimum useful workflow.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to minimum useful workflow.

**Page action**

Write one sentence that explains how 'Minimum useful workflow' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 2 review checklist

This section applies part 2 review checklist to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to part 2 review checklist.
- Name the human reviewer and the decision they still own. Apply it specifically to part 2 review checklist.
- Write the output format before connecting tools or automations. Apply it specifically to part 2 review checklist.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to part 2 review checklist.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to part 2 review checklist.

**Page action**

Write one sentence that explains how 'Part 2 review checklist' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 3: Knowledge Pack

A new implementation section begins here.

## Knowledge pack purpose

This section applies knowledge pack purpose to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to knowledge pack purpose.
- Write the output format before connecting tools or automations. Apply it specifically to knowledge pack purpose.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to knowledge pack purpose.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to knowledge pack purpose.
- Store lessons learned so the next workflow becomes easier to build. Apply it

**Page action**

Write one sentence that explains how 'Knowledge pack purpose' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Offer and service facts

This section applies offer and service facts to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research templates. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to offer and service facts.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to offer and service facts.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to offer and service facts.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to offer and service facts.
- Define the exact trigger that starts this workflow. Apply it specifically to offer and service facts.

**Page action**

Write one sentence that explains how 'Offer and service facts' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Audience context

This section applies audience context to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to audience context.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to audience context.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to audience context.
- Define the exact trigger that starts this workflow. Apply it specifically to audience context.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to audience context.

**Page action**

Write one sentence that explains how 'Audience context' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Voice and tone samples

This section applies voice and tone samples to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to voice and tone samples.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to voice and tone samples.
- Define the exact trigger that starts this workflow. Apply it specifically to voice and tone samples.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to voice and tone samples.
- Name the human reviewer and the decision they still own. Apply it specifically to voice and tone samples.

**Page action**

Write one sentence that explains how 'Voice and tone samples' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Policy boundaries

This section applies policy boundaries to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research workflow. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to policy boundaries.
- Define the exact trigger that starts this workflow. Apply it specifically to policy boundaries.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to policy boundaries.
- Name the human reviewer and the decision they still own. Apply it specifically to policy boundaries.
- Write the output format before connecting tools or automations. Apply it specifically to policy boundaries.

**Page action**

Write one sentence that explains how 'Policy boundaries' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Examples of good outputs

This section applies examples of good outputs to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to examples of good outputs.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to examples of good outputs.
- Name the human reviewer and the decision they still own. Apply it specifically to examples of good outputs.
- Write the output format before connecting tools or automations. Apply it specifically to examples of good outputs.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to examples of good outputs.

**Page action**

Write one sentence that explains how 'Examples of good outputs' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Examples of bad outputs

This section applies examples of bad outputs to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to examples of bad outputs.
- Name the human reviewer and the decision they still own. Apply it specifically to examples of bad outputs.
- Write the output format before connecting tools or automations. Apply it specifically to examples of bad outputs.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to examples of bad outputs.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to examples of bad outputs.

**Page action**

Write one sentence that explains how 'Examples of bad outputs' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# FAQ capture

This section applies faq capture to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to faq capture.
- Write the output format before connecting tools or automations. Apply it specifically to faq capture.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to faq capture.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to faq capture.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to faq capture.

**Page action**

Write one sentence that explains how 'FAQ capture' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Glossary and definitions

This section applies glossary and definitions to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to glossary and definitions.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to glossary and definitions.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to glossary and definitions.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to glossary and definitions.
- Define the exact trigger that starts this workflow. Apply it specifically to glossary and definitions.

**Page action**

Write one sentence that explains how 'Glossary and definitions' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Source freshness

This section applies source freshness to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to source freshness.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to source freshness.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to source freshness.
- Define the exact trigger that starts this workflow. Apply it specifically to source freshness.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to source freshness.

**Page action**

Write one sentence that explains how 'Source freshness' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Knowledge pack QA

This section applies knowledge pack qa to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: customer ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to knowledge pack qa.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to knowledge pack qa.
- Define the exact trigger that starts this workflow. Apply it specifically to knowledge pack qa.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to knowledge pack qa.
- Name the human reviewer and the decision they still own. Apply it specifically to knowledge pack qa.

**Page action**

Write one sentence that explains how 'Knowledge pack QA' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 3 review checklist

This section applies part 3 review checklist to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to part 3 review checklist.
- Define the exact trigger that starts this workflow. Apply it specifically to part 3 review checklist.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to part 3 review checklist.
- Name the human reviewer and the decision they still own. Apply it specifically to part 3 review checklist.
- Write the output format before connecting tools or automations. Apply it specifically to part 3 review checklist.

**Page action**

Write one sentence that explains how 'Part 3 review checklist' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 4: Prompt Stack

A new implementation section begins here.

## Role prompt

This section applies role prompt to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research guide. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to role prompt.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to role prompt.
- Name the human reviewer and the decision they still own. Apply it specifically to role prompt.
- Write the output format before connecting tools or automations. Apply it specifically to role prompt.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment.

**Page action**

Write one sentence that explains how 'Role prompt' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Context prompt

This section applies context prompt to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: customer ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to context prompt.
- Name the human reviewer and the decision they still own. Apply it specifically to context prompt.
- Write the output format before connecting tools or automations. Apply it specifically to context prompt.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to context prompt.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to context prompt.

**Page action**

Write one sentence that explains how 'Context prompt' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Task prompt

This section applies task prompt to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to task prompt.
- Write the output format before connecting tools or automations. Apply it specifically to task prompt.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to task prompt.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to task prompt.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to task prompt.

**Page action**

Write one sentence that explains how 'Task prompt' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Quality checklist prompt

This section applies quality checklist prompt to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: customer ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to quality checklist prompt.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to quality checklist prompt.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to quality checklist prompt.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to quality checklist prompt.
- Define the exact trigger that starts this workflow. Apply it specifically to quality checklist prompt.

**Page action**

Write one sentence that explains how 'Quality checklist prompt' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Escalation prompt

This section applies escalation prompt to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research workflow. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to escalation prompt.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to escalation prompt.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to escalation prompt.
- Define the exact trigger that starts this workflow. Apply it specifically to escalation prompt.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to escalation prompt.

**Page action**

Write one sentence that explains how 'Escalation prompt' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Output format prompt

This section applies output format prompt to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to output format prompt.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to output format prompt.
- Define the exact trigger that starts this workflow. Apply it specifically to output format prompt.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to output format prompt.
- Name the human reviewer and the decision they still own. Apply it specifically to output format prompt.

**Page action**

Write one sentence that explains how 'Output format prompt' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Evidence prompt

This section applies evidence prompt to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research workflow. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to evidence prompt.
- Define the exact trigger that starts this workflow. Apply it specifically to evidence prompt.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to evidence prompt.
- Name the human reviewer and the decision they still own. Apply it specifically to evidence prompt.
- Write the output format before connecting tools or automations. Apply it specifically to evidence prompt.

**Page action**

Write one sentence that explains how 'Evidence prompt' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Tone guardrails

This section applies tone guardrails to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to tone guardrails.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to tone guardrails.
- Name the human reviewer and the decision they still own. Apply it specifically to tone guardrails.
- Write the output format before connecting tools or automations. Apply it specifically to tone guardrails.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to tone guardrails.

**Page action**

Write one sentence that explains how 'Tone guardrails' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Prompt testing cases

This section applies prompt testing cases to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: research ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to prompt testing cases.
- Name the human reviewer and the decision they still own. Apply it specifically to prompt testing cases.
- Write the output format before connecting tools or automations. Apply it specifically to prompt testing cases.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to prompt testing cases.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to prompt testing cases.

**Page action**

Write one sentence that explains how 'Prompt testing cases' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Prompt revision log

This section applies prompt revision log to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: research ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to prompt revision log.
- Write the output format before connecting tools or automations. Apply it specifically to prompt revision log.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to prompt revision log.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to prompt revision log.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to prompt revision log.

**Page action**

Write one sentence that explains how 'Prompt revision log' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Prompt handoff notes

This section applies prompt handoff notes to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to prompt handoff notes.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to prompt handoff notes.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to prompt handoff notes.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to prompt handoff notes.
- Define the exact trigger that starts this workflow. Apply it specifically to prompt handoff notes.

**Page action**

Write one sentence that explains how 'Prompt handoff notes' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 4 review checklist

This section applies part 4 review checklist to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to part 4 review checklist.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to part 4 review checklist.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to part 4 review checklist.
- Define the exact trigger that starts this workflow. Apply it specifically to part 4 review checklist.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to part 4 review checklist.

**Page action**

Write one sentence that explains how 'Part 4 review checklist' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 5: Build and Integration

A new implementation section begins here.

## Tool connection plan

This section applies tool connection plan to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to tool connection plan.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to tool connection plan.
- Define the exact trigger that starts this workflow. Apply it specifically to tool connection plan.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to tool connection plan.
- Name the human reviewer and the decision they still own. Apply it specifically to

**Page action**

Write one sentence that explains how 'Tool connection plan' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Form and intake setup

This section applies form and intake setup to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to form and intake setup.
- Define the exact trigger that starts this workflow. Apply it specifically to form and intake setup.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to form and intake setup.
- Name the human reviewer and the decision they still own. Apply it specifically to form and intake setup.
- Write the output format before connecting tools or automations. Apply it specifically to form and intake setup.

**Page action**

Write one sentence that explains how 'Form and intake setup' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Calendar or CRM handoff

This section applies calendar or crm handoff to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to calendar or crm handoff.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to calendar or crm handoff.
- Name the human reviewer and the decision they still own. Apply it specifically to calendar or crm handoff.
- Write the output format before connecting tools or automations. Apply it specifically to calendar or crm handoff.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to calendar or crm handoff.

**Page action**

Write one sentence that explains how 'Calendar or CRM handoff' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Document generation flow

This section applies document generation flow to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: customer ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to document generation flow.
- Name the human reviewer and the decision they still own. Apply it specifically to document generation flow.
- Write the output format before connecting tools or automations. Apply it specifically to document generation flow.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to document generation flow.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to document generation flow.

**Page action**

Write one sentence that explains how 'Document generation flow' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Message draft workflow

This section applies message draft workflow to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to message draft workflow.
- Write the output format before connecting tools or automations. Apply it specifically to message draft workflow.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to message draft workflow.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to message draft workflow.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to message draft workflow.

**Page action**

Write one sentence that explains how 'Message draft workflow' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Spreadsheet or dashboard output

This section applies spreadsheet or dashboard output to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research templates. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to spreadsheet or dashboard output.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to spreadsheet or dashboard output.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to spreadsheet or dashboard output.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to spreadsheet or dashboard output.
- Define the exact trigger that starts this workflow. Apply it specifically to spreadsheet or dashboard output.

**Page action**

Write one sentence that explains how 'Spreadsheet or dashboard output' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Human approval queue

This section applies human approval queue to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to human approval queue.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to human approval queue.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to human approval queue.
- Define the exact trigger that starts this workflow. Apply it specifically to human approval queue.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to human approval queue.

**Page action**

Write one sentence that explains how 'Human approval queue' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Notification rules

This section applies notification rules to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to notification rules.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to notification rules.
- Define the exact trigger that starts this workflow. Apply it specifically to notification rules.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to notification rules.
- Name the human reviewer and the decision they still own. Apply it specifically to notification rules.

**Page action**

Write one sentence that explains how 'Notification rules' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Version control habit

This section applies version control habit to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to version control habit.
- Define the exact trigger that starts this workflow. Apply it specifically to version control habit.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to version control habit.
- Name the human reviewer and the decision they still own. Apply it specifically to version control habit.
- Write the output format before connecting tools or automations. Apply it specifically to version control habit.

**Page action**

Write one sentence that explains how 'Version control habit' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Pilot test batch

This section applies pilot test batch to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to pilot test batch.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to pilot test batch.
- Name the human reviewer and the decision they still own. Apply it specifically to pilot test batch.
- Write the output format before connecting tools or automations. Apply it specifically to pilot test batch.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to pilot test batch.

**Page action**

Write one sentence that explains how 'Pilot test batch' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Launch readiness

This section applies launch readiness to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to launch readiness.
- Name the human reviewer and the decision they still own. Apply it specifically to launch readiness.
- Write the output format before connecting tools or automations. Apply it specifically to launch readiness.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to launch readiness.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to launch readiness.

**Page action**

Write one sentence that explains how 'Launch readiness' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 5 review checklist

This section applies part 5 review checklist to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to part 5 review checklist.
- Write the output format before connecting tools or automations. Apply it specifically to part 5 review checklist.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to part 5 review checklist.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to part 5 review checklist.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to part 5 review checklist.

**Page action**

Write one sentence that explains how 'Part 5 review checklist' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 6: Quality, Risk, and Review

A new implementation section begins here.

## Quality standard

This section applies quality standard to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: research ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to quality standard.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to quality standard.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to quality standard.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to quality standard.
- Define the exact trigger that starts this workflow. Apply it specifically to quality

**Page action**

Write one sentence that explains how 'Quality standard' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Review rubric

This section applies review rubric to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to review rubric.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to review rubric.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to review rubric.
- Define the exact trigger that starts this workflow. Apply it specifically to review rubric.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to review rubric.

**Page action**

Write one sentence that explains how 'Review rubric' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Escalation language

This section applies escalation language to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research workflow. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to escalation language.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to escalation language.
- Define the exact trigger that starts this workflow. Apply it specifically to escalation language.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to escalation language.
- Name the human reviewer and the decision they still own. Apply it specifically to escalation language.

**Page action**

Write one sentence that explains how 'Escalation language' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Sensitive data rule

This section applies sensitive data rule to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to sensitive data rule.
- Define the exact trigger that starts this workflow. Apply it specifically to sensitive data rule.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to sensitive data rule.
- Name the human reviewer and the decision they still own. Apply it specifically to sensitive data rule.
- Write the output format before connecting tools or automations. Apply it specifically to sensitive data rule.

**Page action**

Write one sentence that explains how 'Sensitive data rule' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Hallucination checks

This section applies hallucination checks to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research templates. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to hallucination checks.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to hallucination checks.
- Name the human reviewer and the decision they still own. Apply it specifically to hallucination checks.
- Write the output format before connecting tools or automations. Apply it specifically to hallucination checks.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to hallucination checks.

**Page action**

Write one sentence that explains how 'Hallucination checks' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Brand voice checks

This section applies brand voice checks to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research guide. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to brand voice checks.
- Name the human reviewer and the decision they still own. Apply it specifically to brand voice checks.
- Write the output format before connecting tools or automations. Apply it specifically to brand voice checks.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to brand voice checks.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to brand voice checks.

**Page action**

Write one sentence that explains how 'Brand voice checks' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Compliance review habit

This section applies compliance review habit to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to compliance review habit.
- Write the output format before connecting tools or automations. Apply it specifically to compliance review habit.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to compliance review habit.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to compliance review habit.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to compliance review habit.

**Page action**

Write one sentence that explains how 'Compliance review habit' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Failure log

This section applies failure log to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to failure log.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to failure log.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to failure log.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to failure log.
- Define the exact trigger that starts this workflow. Apply it specifically to failure log.

**Page action**

Write one sentence that explains how 'Failure log' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Human override path

This section applies human override path to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: customer ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to human override path.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to human override path.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to human override path.
- Define the exact trigger that starts this workflow. Apply it specifically to human override path.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to human override path.

**Page action**

Write one sentence that explains how 'Human override path' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Customer trust signals

This section applies customer trust signals to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to customer trust signals.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to customer trust signals.
- Define the exact trigger that starts this workflow. Apply it specifically to customer trust signals.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to customer trust signals.
- Name the human reviewer and the decision they still own. Apply it specifically to customer trust signals.

**Page action**

Write one sentence that explains how 'Customer trust signals' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Weekly QA meeting

This section applies weekly qa meeting to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: customer ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to weekly qa meeting.
- Define the exact trigger that starts this workflow. Apply it specifically to weekly qa meeting.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to weekly qa meeting.
- Name the human reviewer and the decision they still own. Apply it specifically to weekly qa meeting.
- Write the output format before connecting tools or automations. Apply it specifically to weekly qa meeting.

**Page action**

Write one sentence that explains how 'Weekly QA meeting' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 6 review checklist

This section applies part 6 review checklist to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to part 6 review checklist.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to part 6 review checklist.
- Name the human reviewer and the decision they still own. Apply it specifically to part 6 review checklist.
- Write the output format before connecting tools or automations. Apply it specifically to part 6 review checklist.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to part 6 review checklist.

**Page action**

Write one sentence that explains how 'Part 6 review checklist' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 7: Launch, Metrics, and Optimization

A new implementation section begins here.

## Soft launch plan

This section applies soft launch plan to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: research ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to soft launch plan.
- Name the human reviewer and the decision they still own. Apply it specifically to soft launch plan.
- Write the output format before connecting tools or automations. Apply it specifically to soft launch plan.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to soft launch plan.
- Measure one speed metric and one quality metric during the pilot. Apply it

**Page action**

Write one sentence that explains how 'Soft launch plan' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Baseline metrics

This section applies baseline metrics to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to baseline metrics.
- Write the output format before connecting tools or automations. Apply it specifically to baseline metrics.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to baseline metrics.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to baseline metrics.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to baseline metrics.

**Page action**

Write one sentence that explains how 'Baseline metrics' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Time saved measurement

This section applies time saved measurement to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research templates. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to time saved measurement.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to time saved measurement.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to time saved measurement.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to time saved measurement.
- Define the exact trigger that starts this workflow. Apply it specifically to time saved measurement.

**Page action**

Write one sentence that explains how 'Time saved measurement' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Response speed measurement

This section applies response speed measurement to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to response speed measurement.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to response speed measurement.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to response speed measurement.
- Define the exact trigger that starts this workflow. Apply it specifically to response speed measurement.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to response speed measurement.

**Page action**

Write one sentence that explains how 'Response speed measurement' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Conversion or completion signal

This section applies conversion or completion signal to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research guide. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to conversion or completion signal.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to conversion or completion signal.
- Define the exact trigger that starts this workflow. Apply it specifically to conversion or completion signal.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to conversion or completion signal.
- Name the human reviewer and the decision they still own. Apply it specifically to conversion or completion signal.

**Page action**

Write one sentence that explains how 'Conversion or completion signal' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Rework rate

This section applies rework rate to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: research ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to rework rate.
- Define the exact trigger that starts this workflow. Apply it specifically to rework rate.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to rework rate.
- Name the human reviewer and the decision they still own. Apply it specifically to rework rate.
- Write the output format before connecting tools or automations. Apply it specifically to rework rate.

**Page action**

Write one sentence that explains how 'Rework rate' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Escalation tracking

This section applies escalation tracking to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to escalation tracking.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to escalation tracking.
- Name the human reviewer and the decision they still own. Apply it specifically to escalation tracking.
- Write the output format before connecting tools or automations. Apply it specifically to escalation tracking.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to escalation tracking.

**Page action**

Write one sentence that explains how 'Escalation tracking' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# User feedback loop

This section applies user feedback loop to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to user feedback loop.
- Name the human reviewer and the decision they still own. Apply it specifically to user feedback loop.
- Write the output format before connecting tools or automations. Apply it specifically to user feedback loop.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to user feedback loop.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to user feedback loop.

**Page action**

Write one sentence that explains how 'User feedback loop' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Iteration cadence

This section applies iteration cadence to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

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The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to iteration cadence.
- Write the output format before connecting tools or automations. Apply it specifically to iteration cadence.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to iteration cadence.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to iteration cadence.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to iteration cadence.

**Page action**

Write one sentence that explains how 'Iteration cadence' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Next workflow selection

This section applies next workflow selection to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to next workflow selection.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to next workflow selection.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to next workflow selection.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to next workflow selection.
- Define the exact trigger that starts this workflow. Apply it specifically to next workflow selection.

**Page action**

Write one sentence that explains how 'Next workflow selection' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# ROI narrative

This section applies roi narrative to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research guide. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to roi narrative.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to roi narrative.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to roi narrative.
- Define the exact trigger that starts this workflow. Apply it specifically to roi narrative.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to roi narrative.

**Page action**

Write one sentence that explains how 'ROI narrative' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 7 review checklist

This section applies part 7 review checklist to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to part 7 review checklist.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to part 7 review checklist.
- Define the exact trigger that starts this workflow. Apply it specifically to part 7 review checklist.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to part 7 review checklist.
- Name the human reviewer and the decision they still own. Apply it specifically to part 7 review checklist.

**Page action**

Write one sentence that explains how 'Part 7 review checklist' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Part 8: Templates, Worksheets, and Sprint Plan

A new implementation section begins here.

## Agent job brief worksheet

This section applies agent job brief worksheet to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to agent job brief worksheet.
- Define the exact trigger that starts this workflow. Apply it specifically to agent job brief worksheet.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to agent job brief worksheet.
- Name the human reviewer and the decision they still own. Apply it specifically to agent job brief worksheet.
- Write the output format before connecting tools or automations. Apply it

**Page action**

Write one sentence that explains how 'Agent job brief worksheet' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Knowledge pack checklist

This section applies knowledge pack checklist to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to knowledge pack checklist.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to knowledge pack checklist.
- Name the human reviewer and the decision they still own. Apply it specifically to knowledge pack checklist.
- Write the output format before connecting tools or automations. Apply it specifically to knowledge pack checklist.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to knowledge pack checklist.

**Page action**

Write one sentence that explains how 'Knowledge pack checklist' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Prompt stack template

This section applies prompt stack template to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research guide. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to prompt stack template.
- Name the human reviewer and the decision they still own. Apply it specifically to prompt stack template.
- Write the output format before connecting tools or automations. Apply it specifically to prompt stack template.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to prompt stack template.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to prompt stack template.

**Page action**

Write one sentence that explains how 'Prompt stack template' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Launch QA checklist

This section applies launch qa checklist to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research playbook. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Name the human reviewer and the decision they still own. Apply it specifically to launch qa checklist.
- Write the output format before connecting tools or automations. Apply it specifically to launch qa checklist.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to launch qa checklist.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to launch qa checklist.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to launch qa checklist.

**Page action**

Write one sentence that explains how 'Launch QA checklist' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Metrics tracker

This section applies metrics tracker to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Write the output format before connecting tools or automations. Apply it specifically to metrics tracker.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to metrics tracker.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to metrics tracker.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to metrics tracker.
- Define the exact trigger that starts this workflow. Apply it specifically to metrics tracker.

**Page action**

Write one sentence that explains how 'Metrics tracker' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Weekly review agenda

This section applies weekly review agenda to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: b2b customer research systems. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to weekly review agenda.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to weekly review agenda.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to weekly review agenda.
- Define the exact trigger that starts this workflow. Apply it specifically to weekly review agenda.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to weekly review agenda.

**Page action**

Write one sentence that explains how 'Weekly review agenda' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Client or customer message template

This section applies client or customer message template to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Measure one speed metric and one quality metric during the pilot. Apply it specifically to client or customer message template.
- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to client or customer message template.
- Define the exact trigger that starts this workflow. Apply it specifically to client or customer message template.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to client or customer message template.
- Name the human reviewer and the decision they still own. Apply it specifically to client or customer message template.

**Page action**

Write one sentence that explains how 'Client or customer message template' changes the workflow for B2B founders, product marketers, researchers, and

# Team handoff template

This section applies team handoff template to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: research ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Store lessons learned so the next workflow becomes easier to build. Apply it specifically to team handoff template.
- Define the exact trigger that starts this workflow. Apply it specifically to team handoff template.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to team handoff template.
- Name the human reviewer and the decision they still own. Apply it specifically to team handoff template.
- Write the output format before connecting tools or automations. Apply it specifically to team handoff template.

**Page action**

Write one sentence that explains how 'Team handoff template' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# 30-day sprint planner

This section applies 30-day sprint planner to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: ai agents. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Define the exact trigger that starts this workflow. Apply it specifically to 30-day sprint planner.
- Collect two strong examples and one weak example before writing prompts. Apply it specifically to 30-day sprint planner.
- Name the human reviewer and the decision they still own. Apply it specifically to 30-day sprint planner.
- Write the output format before connecting tools or automations. Apply it specifically to 30-day sprint planner.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to 30-day sprint planner.

**Page action**

Write one sentence that explains how '30-day sprint planner' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Publishing and packaging notes

This section applies publishing and packaging notes to b2b customer research. The aim is to give b2b founders, product marketers, researchers, and growth teams a practical way to turn the ebook promise into a repeatable operating habit.

Use this page as a working note. Start with one real example from the business, identify the current manual steps, then decide which part an AI agent can prepare, draft, sort, summarize, or route for review.

The core outcome remains: Create agents for evidence collection, theme clustering, objection mapping, and insight briefs. The agent should make that outcome easier to deliver without removing human accountability.

SEO and positioning cue for this page: customer ai automation. Keep the language close to what buyers already search for, but make the implementation specific enough to feel usable.

### Implementation moves

- Collect two strong examples and one weak example before writing prompts. Apply it specifically to publishing and packaging notes.
- Name the human reviewer and the decision they still own. Apply it specifically to publishing and packaging notes.
- Write the output format before connecting tools or automations. Apply it specifically to publishing and packaging notes.
- Add an escalation rule for uncertainty, missing context, or sensitive judgment. Apply it specifically to publishing and packaging notes.
- Measure one speed metric and one quality metric during the pilot. Apply it specifically to publishing and packaging notes.

**Page action**

Write one sentence that explains how 'Publishing and packaging notes' changes the workflow for B2B founders, product marketers, researchers, and growth teams.

# Final Implementation Checklist

You now have a complete 100-page implementation edition for AI Agents for B2B Customer Research. The next step is not to automate everything. The next step is to choose one workflow and prove that the agent can create measurable leverage.

Use the checklist below before publishing the ebook or handing it to a buyer. The strongest digital products combine a clear promise, practical templates, and a short path to first results.

- Run an editorial pass for examples, screenshots, and buyer-specific language.
- Create the workbook templates promised in the bundle strategy.
- Generate and review the cover image from the cover prompt.
- Build a simple sales page using the generated sales_page.md file.
- Publish the ebook with one bonus asset that helps the buyer take action today.
- Collect reader questions and use them to improve the next edition.