

RESEARCH

Intermediate

30 MIN

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Streamline market research for a new strategy.

Research and summarize customer insights across multiple sources in one pass instead of reading every report individually.

MICROSOFT 365

Word

WORKS WITH

ChatGPT

Claude

Copilot

Business Outcome

A synthesized view of customer insight across sources, ready to inform a new marketing strategy.

Workflow Steps

Step 1: Gather the source material in one place

Word

Pull the customer research, survey results, and market reports into a single Word doc or a short list of linked files, noting each one's date and scope — if the AI has to go hunting across loosely described sources, the synthesis in step 2 ends up just as scattered as the inputs were.

Step 2: Ask for synthesis, not just summary

Copilot

ChatGPT

Claude

A summary restates each source; synthesis identifies where sources agree, disagree, and what that means for strategy — ask explicitly for the latter.

PROMPT

Here are four customer research reports from the past year. Identify where they agree, where they conflict, and the 3-4 insights with the strongest evidence behind them that should shape our next marketing strategy.

Step 3: Trace each insight back to its source

Word

Before an insight goes into a strategy deck, confirm which report it actually came from and that it wasn't overstated in the synthesis.

Step 4: Flag what the research doesn't cover

Word

Note any strategic question the gathered research can't actually answer, rather than letting a confident-sounding synthesis paper over a real gap.

✓ Check the work

- Every headline insight traces back to a specific source report.
- Conflicting findings between sources are surfaced, not silently resolved.
- Gaps in the research are explicitly noted, not filled in with assumption.

Expected Outcome

A summary document identifying the 3-4 insights that should actually shape the new strategy, each traceable to its source.

Want help rolling this out across your team? [Go to Liminals.Tech](#) ■