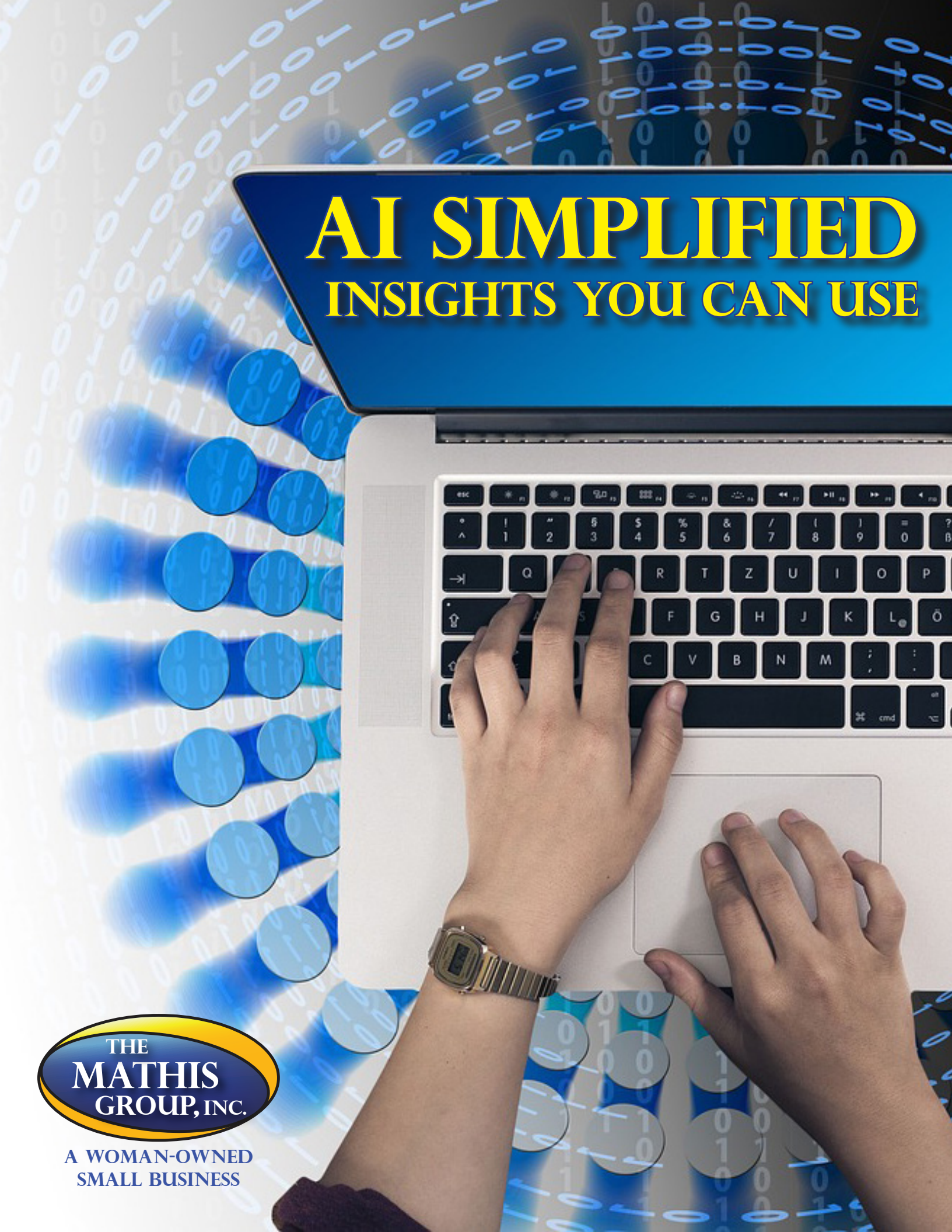




AI SIMPLIFIED

INSIGHTS YOU CAN USE



A WOMAN-OWNED
SMALL BUSINESS

JULY 2026

AI IS MOVING FROM EXPERIMENTAL TO EVERYDAY PRACTICE

AI is moving from experimental to operational. For opportunity-seeking businesses, it is no longer simply learning what AI is. It is to learn how to use it responsibly in daily operations.

One of the most practical starting points is customer insight. Most businesses already have useful customer information scattered across reviews, emails, surveys, sales notes, support tickets, social media comments, and employee conversations. AI can help organize that information, identify repeated themes, and turn customer feedback into clearer decisions.

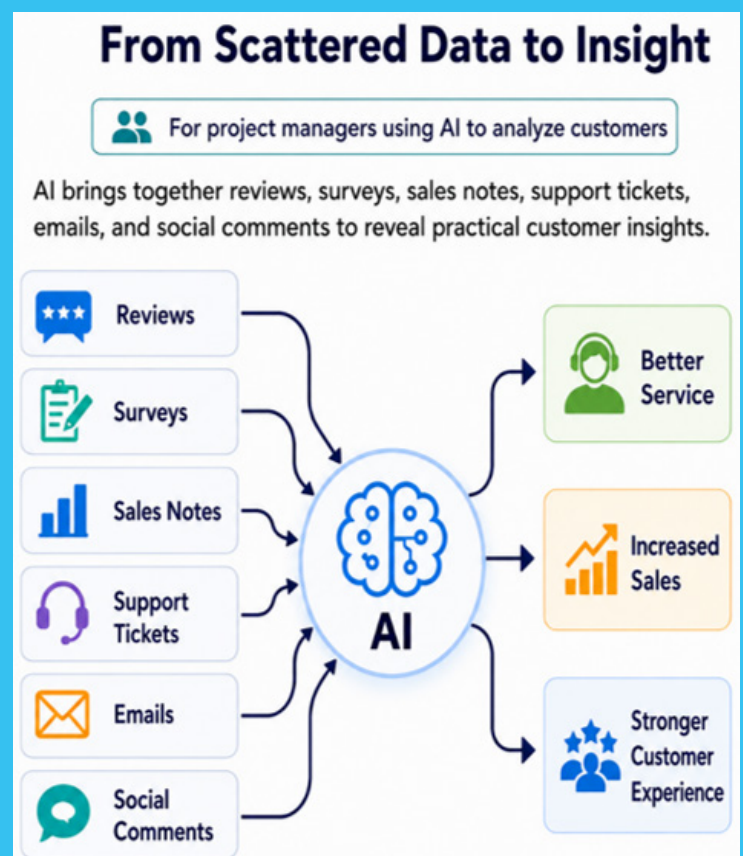
AI turns scattered customer information into organized insight. Leaders can use that insight to improve service, communication, and decisions. The accompanying graphic shows how AI organizes scattered data from across the organization. It identifies themes, categories, and customer patterns. The first step is not buying more technology; it is organizing what the business already knows about its customers.

Organizations need a roadmap, not just access to tools. This graphic shows how AI can benefit any business, with unstructured or structured data, and how it can help inform future decisions.

Businesses want to use AI, but security matters. They must protect private customer and organizational information and ensure it is secure and does not leak any personal or privileged information.

Customer information may be spread across multiple sources, such as emails, reviews, surveys, sales notes, support tickets, social media comments, and employee conversations. This data needs to be pulled together in a way that allows us to analyze and benefit the small business. AI analysis may reveal new offerings for customers, creating revenue opportunities while strengthening trust and loyalty.

The practical benefit of AI in better understanding customers is a powerful advantage that delivers value to the average business. It will help serve customers better, increase sales, and improve customer experience over time. AI helps turn scattered customer feedback and data into practical, insightful perceptions, supported by solution-driven ideas.



AI CAN HELP FIND PATTERNS IN CUSTOMER FEEDBACK

Customer feedback often contains patterns that are hard to see when viewed individually. AI can help identify patterns people may miss by summarizing reviews, complaints, surveys, and support notes. It can also organize unstructured feedback and review useful themes. AI can condense substantial amounts of customer input, revealing that customers praise the company overall but consistently complain about one issue, such as response time. If the customer loves the company but suggests a faster response time, AI could improve response time and turn a good customer into a great one. AI could also detect the most common questions about your company's products or services. Once the team identifies frequent questions, it can create approved answers, chatbot responses, or FAQ content.

The main goal of using AI for data analysis is to gather data for feedback, improve the customer experience, develop better products, and provide more timely responses that benefit buyers, encouraging them to keep purchasing products and services from the organization.

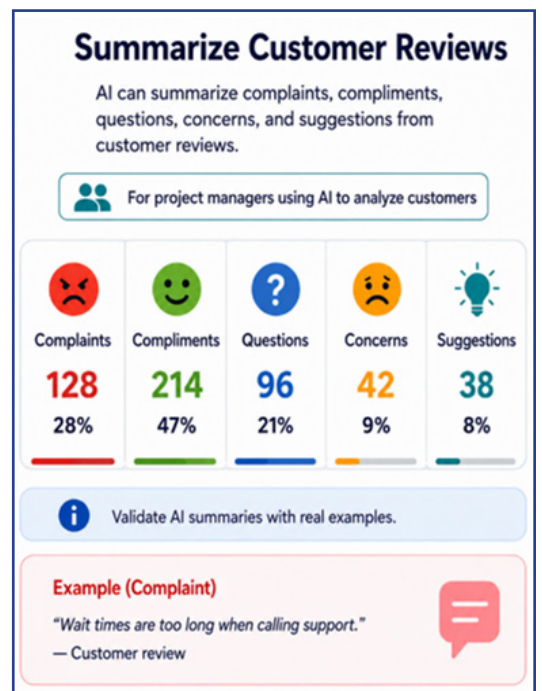


Use AI to Summarize Customer Reviews

Start by collecting customer information from Google, Facebook, industry directories, testimonials, and other review sources. Store it in one place for AI to analyze. The accompanying graphic shows how AI changes one's understanding of the customer's challenges. It can help reveal repeated themes that may be difficult to see when reviewing feedback one comment at a time.

Organizations do not have to provide every review; they only need to gather enough data for AI to analyze and identify initial themes. Overseers of the AI tool can ask it to summarize the customer's most common complaints, compliments, questions, concerns, and suggestions. AI should support judgment, not replace it. After reviewing AI summaries, leaders should compare them with actual customer comments to determine whether complaints have been filed. This helps confirm that the patterns are accurate before making major decisions.

After AI summarizes the reviews, the team can compare the summary to actual examples and perceptions from other areas of the organization. They should not treat the AI summary as the



absolute truth. AI can hallucinate or identify patterns that are not actually there. For this reason, if the team questions whether the data and summaries are accurate, they need to provide more information for AI to evaluate. It could be that the initial data has skewed the output. The team is looking for direct evidence from artificial intelligence to support the summary, which aligns with the company's findings and uses this data to improve, promote, and clarify next steps for the organization.

Use AI to Organize Customer Complaints

Every business encounters dissatisfied customers. The challenge is understanding why. AI can analyze complaints, categorize them, and suggest suitable responses. Customers who express confusion about billing and frustrations over invoicing differ from those who report service inconsistencies or scheduling issues. AI can draft an empathetic email that reassures the customer, demonstrates the organization's commitment to retention, and recommends next steps to serve and keep the customer long-term.

This graphic organizes customer complaints. AI can help categorize complaints so leaders can see whether the issue is isolated or part of a larger process problem. Once complaints are sorted, leaders within the organization can determine whether problems are isolated incidents or part of a broader, overlooked systemic gap. Some complaints may arise from a misunderstanding of the company's offerings and how they differ from customer expectations. However, repeated complaints within the same category typically indicate a process issue with significant gaps in communication and service delivery for that customer group.

Review customers' understanding of the product, process, and next steps before speaking with your team, so they feel confident moving forward.

Over time, common complaints are added to an AI tool. The tool can draft a response that acknowledges the concern, explains the next steps, and provides a direct customer service contact. If the customer has any problems, they have all the information immediately, and the company has invested minimal time in keeping that customer happy and resolving their issue quickly.



Use AI to Identify What Customers Appreciate Most

Not all customer feedback is about problems; many will share what they love about the organization's products and services. AI can identify what matters most to buyers. Common themes may include trust, speed, friendliness, expertise, convenience, affordability, quality, personal attention, customer service, and education.

Once you understand what customers value, the business can highlight its strengths in marketing and sales. For example, customers often mention that your team is knowledgeable and explains the process clearly. You can use this feedback to expand on that story in marketing materials and emails early in the sales process. Additionally, if customers mention the convenience and personal attention they receive, emphasize that every customer who does business with the organization receives the same level of personal care.

One of the most successful documents for certain products and services is a praise list. A praise list is a helpful way for customers to share their praise for products, services, or the company's experience. Leaders can use AI to summarize positive comments and turn them into a thematic praise list from website sales scripts and social media. A categorized praise list can boost marketing efforts. Actual customer quotes can help potential buyers see why they should trust the company.

Use AI to Help You Understand Customer Questions

Businesses that prioritize customer service tend to answer questions one at a time but often overlook the importance of organizing them. Interviewing staff about the most common questions is a typical way to gather internal feedback. Employees frequently answer the same questions repeatedly and explain similar concepts, processes, or product details to new customers. This can be helpful when using an artificial intelligence tool to identify communication gaps and make the narrative clearer so a wider audience can understand it.

AI can also assist in analyzing customer questions, pinpointing the most common inquiries, and identifying areas where communication may be unclear. For repeated questions, AI can generate clearer content, enhance training, and improve sales conversations. Additionally, it can identify gaps in existing materials.

Leaders have intentionally rewritten all email marketing content and responses to questions, asking AI to rewrite them at a 5th-grade level to make the narratives easier to understand. When customers understand the product, process, and next steps before talking with your team, they are more likely to feel confident and take action.



Use AI to Identify Confusing Parts of Your Customer Journey

Customers dislike confusion because it undermines trust in leadership and the product. When the sales process or product features are confusing, customers might leave and turn to a competitor who explains things more clearly.

Confusing parts of a customer's journey can occur before or after the sales process. Artificial intelligence can analyze data to find the most common sources of confusion. This helps improve and clarify language in marketing materials, social media, or sales documents. AI can offer explanations by highlighting the supporting processes, using visuals, and simplifying answers to reduce confusion.

One of the easiest ways for AI to identify misunderstandings is to ask when customers become confused about the sales process, or social media and advertising. AI can analyze these situations using various metrics and make different recommendations. These suggestions will improve decision-making by delivering clearer, more effective messages to its target audience.



Use AI to Improve the Answers Employees Give Customers

AI can analyze employee responses and suggest ways to make them clearer, simpler, and more customer-centered. Sometimes, when individuals answer customer questions, they don't see it from the customer's perspective; they view it only from the organization's perspective. Responses that focus on customer value engage customers and shift the focus to them rather than the business. This approach increases a person's willingness to spend money and to choose this new vendor or to buy a product from them.

AI can create approved templates for these questions and customize them, keeping the core information consistent while allowing personalization for each customer. This reduces any mistakes in the customer experience and increases customer satisfaction.

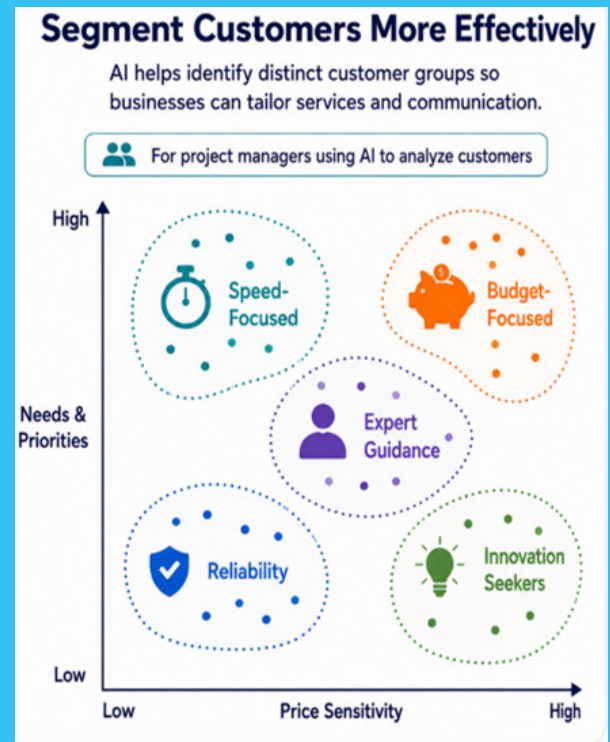
One of the simplest ways to start letting AI review customer responses is to create a shared document of approved responses currently in use. Using this document, ask AI for suggestions on how to respond to the customer in a more value-driven way, supporting their experience and position. After editing and approving it, all parties should refer to this document for their approved responses.

AI CAN HELP EFFECTIVELY SEGMENT CUSTOMERS

Examining the customer base is important because not all customers are the same. Customers have diverse budget needs and perceptions of the company, and they use a range of products and services. AI can help businesses identify customer segments from existing data. Once these groups are clear, the business can offer relevant services or introduce products that customers have not tried.

Many companies have never analyzed their existing customer base, and the idea of segmenting it is hard to comprehend. Customer segmentation is one of the most valuable parts of analysis, because it helps you see what people do and how they currently use your company. A business can begin grouping these customers to understand the value they seek and the problems your products and services consistently address.

The practical benefit of segmentation is improved communication and understanding of different customer groups. It helps create targeted messages to enhance service experiences and offer better deals, encouraging segments to return and make repeat purchases.



Use AI to Group Customers by Needs

It doesn't take long for AI to learn customers' purchasing habits. These habits help quickly generate a list of the most bought products and services. Businesses can start by reviewing customer notes, intake forms, sales calls, and survey responses, then ask AI to identify common customer needs or motivations. AI analyzes this data and ranks the top motivations from most to least important. For example, some customers may prioritize speed over cost, while others seek expert guidance, longevity, and reliability from a company. Both are valuable; however, understanding each customer's motivation shapes the way businesses communicate and the offers they present.

A simple way to understand this information is to ask the AI tool to analyze the current customer notes and documentation, group customers by their main motivation, give each group a straightforward name, and describe what matters most to each group. This approach will help reveal natural customer categories.

Use AI to Create a Customer Experience that is Personalized, Responsive, and Consistent

Customers increasingly expect businesses to respond quickly to their needs when solving problems and providing services. Additionally, the same customers expect every team leader to remember their preferences and consistently offer relevant solutions that support them. AI can assist businesses in meeting these expectations by improving their understanding of customer base categories and customer pains.

AI can also help businesses detect customer intent earlier in the buying process. Companies are using AI to predict what customers will purchase in the future, rather than relying solely on historical data, and to offer insights on past purchases. This uses their true predictive AI model to anticipate and project future sales.

For example, an AI-supported system could recognize when a customer shows signs of frustration, which might be a buying signal for a product or solution. As AI makes this prediction, it is time to send a personalized email or phone call to this customer about the new offerings that could benefit them.

Understanding this sooner enables the business to interact with the customer more intelligently and quickly. However, this does not lessen human involvement. Instead, it maintains and supports AI and its strengths, which include summarization, personalization, and quality control, while keeping humans involved in every part of the process.

Use AI to Tailor Messages for Different Customer Groups

In competitive markets, the advantage often goes to the company that responds quickly with relevant customer-centered value. Because AI analyzes customer data and groups, it helps tailor its focus to each customer's needs and value. AI can assist by customizing messages, making each one feel as if it is only for that specific group, and using terminology, phrasing, and connections that support that persona.

For example, a message to a price-conscious customer highlights value, efficiency, and special pricing, while a message to someone seeking the newest technology and features emphasizes those attributes. Where one message focuses on pricing and value, the other might emphasize the newness of the future, its functionality, and what it can do for each buyer.

Focusing on the messages, letting them adapt to different customer types, and making each message sound distinct through language focus and emphasis are effective ways to stay connected with customers and better support their perspectives.

AI CAN HELP TURN CUSTOMER INSIGHT INTO ACTION

Understanding the customer is only useful if you turn that data into an action plan to engage customers and develop new products and services that meet their needs. AI can help summarize insights, but leadership must decide what to change, improve, evaluate, and build to support these customers' desires.

A practical approach is to establish a monthly customer insight process. The meeting should review feedback, identify patterns, highlight top issues and opportunities, and assign action items. Discussing these situations without taking action wastes time and doesn't utilize AI effectively. Since AI can perform quick analysis, these recommendations will help keep the meeting centered on the customer and ensure the insights regularly meet their needs.

AI can be beneficial in providing clarity, improving judgment, and driving direct changes to support customers and foster future ideas.

Create a Monthly Customer Insight Report

What is a monthly customer insight report, and how can it benefit AI usage? Each month, collecting customer feedback from various sources and interactions helps identify customer activity patterns, both positive and negative, and guides how to address each. These sources may include reviews, complaints, support tickets, sales notes, surveys, social media comments, or customer service engagement comments. A company can ask you to create a report on customer feedback. It can summarize topic complaints, repeated questions, merging trends, and suggested action items.

One challenge in creating a monthly customer insight report is that this process takes several hours, making the report and meetings too lengthy. The report is brief, useful, insightful, and easy to understand, connecting directly to practical decisions that can be made in a single meeting. These recommendations should help facilitate a quick response to resolve issues. If a problem requires multiple meetings and months to fix, the customer may choose to do business elsewhere in the future.

Choose One Customer Improvement Project

After reviewing the monthly customer insight report, use that data to implement improvement projects that permanently fix the problem. This could involve addressing specific issues like confusing processes, misleading sales materials, or emails that lead to additional questions.

The organization should avoid trying to fix everything at once and instead focus on the most critical components, following the 80/20 rule. 80% of the problems stem from 20% of the issues. By targeting the few issues that cause the most customer frustration, the business can quickly see a noticeable improvement.

Each of these projects needs an owner and a deadline for completion. AI can help identify the issues people are responsible for creating and assist them in developing projects to fix these issues and prevent them from happening again. This level of quality is essential for the customer to keep purchasing products and services from anyone.

CREATE MEASURES AND TRACK WHETHER THE CHANGE WORKED

To determine if changes are effective, leaders need a baseline. They should monitor current complaints and suggestions, and compare them over time. If everything is heading in the right direction with new products, services, and clear marketing and sales materials, complaints in these areas should decrease.

When done correctly, leaders can benefit from AI, as those who leverage research can make a meaningful difference by offering new ways to do business.

AI can compare a pre-solution baseline to the solution measurement to determine whether everything is heading in the right direction. This helps businesses determine whether the action worked and allows them to move on to the next priority.

Following this principle and practical habit will close the gap between understanding the gaps in the data and seeing them resolved through actionable steps.



CONCLUSION

AI can assist businesses in better understanding their customers by organizing data from different sources and feedback, and by spotting patterns that often frustrate customers. By analyzing this data, we can communicate effectively and turn complaints into actionable insights that lead to new products, innovative solutions, and improved customer retention.

The best place to start is by collecting customer comments, removing any sensitive details, asking AI to identify recurring themes, questions, and complaints, and then reviewing that information over time. Using that information to develop solutions, whether it involves changing how one does business, will benefit and strengthen customer relationships.

90-DAY AI CUSTOMER INSIGHT PLAN OUTLINE

Below are infographics to help implement AI within 90 days. This 90-day plan provides a practical process for gathering, organizing, analyzing, and acting on customer feedback using AI. The goal is to shift from scattered customer input to a reliable insight system that enables the organization to identify patterns, prioritize improvements, and measure impact.

90-Day AI Customer Insight Plan

A practical roadmap for turning customer feedback into insight, action, and measurable improvement.



THREE PHASES. ONE 90-DAY JOURNEY.

1



Days 1–30: Build the Foundation

Establish the structure, tools, and baseline for capturing customer insight.

2



Days 31–60: Analyze and Prioritize

Turn feedback into clear themes, customer patterns, and one focused improvement.

3



Days 61–90: Act, Measure, and Scale

Implement improvements, measure results, and create an ongoing insight rhythm.



From collecting feedback to using customer insight as a disciplined, measurable decision-making process.



90-Day AI Customer Insight Plan



Days 1–30: Build the Foundation

Goal: establish the structure, tools, and baseline for capturing customer insight.

1



Build the Foundation

- Identify main feedback sources
- Decide where feedback will be stored
- Clarify who participates
- Define the purpose and how insights will be used



Suggested Outputs

- Customer feedback workflow
- Centralized feedback repository
- List of feedback sources
- Initial project team or stakeholders

2



Collect Feedback

- Gather input from surveys
- Customer service tickets
- Sales conversations
- Reviews and testimonials
- Emails
- Social media comments
- Interviews or focus groups
- Website or chatbot interactions



Suggested Outputs

- Feedback intake process
- Standard capture form or template
- Initial feedback dataset

3



Clean & Organize Data

- Remove duplicates
- Correct obvious errors
- Group feedback by source, date, product, service area, or customer type
- Separate useful comments from incomplete or irrelevant responses
- Protect sensitive information



Suggested Outputs

- Cleaned feedback file
- Organized customer feedback database
- Data quality checklist

4



Define Insight Categories

- Create consistent categories such as product or service quality, customer support, pricing, communication, ease of use, delivery or response time, satisfaction, retention risks, and improvement requests.



Suggested Outputs

- Insight category framework
- Tagging system
- Definitions for each category

5



Set Baseline Metrics

- Establish starting metrics such as customer satisfaction score, net promoter score, complaints by category, average response time, repeat issue frequency, churn or retention indicators, sentiment score, and common pain points.



Suggested Outputs

- Baseline performance report
- Starting KPI dashboard
- Priority issue summary



End of Days 1–30: a clear feedback system, organized data, insight categories, and baseline metrics are in place.



90-Day AI Customer Insight Plan



Days 31–60: Analyze and Prioritize

Goal: turn feedback into clear themes, customer patterns, and one focused improvement project.

1



Summarize Feedback with AI

- Run feedback through AI summarization tools
- Generate summaries by category, source, or customer segment
- Compare AI summaries with human review for accuracy
- Identify repeated language, concerns, and requests



Suggested Outputs

- AI-generated feedback summaries
- Theme summaries by category
- Human-reviewed insight notes

2



Find Customer Patterns

- Identify frequently repeated complaints
- Common requests for improvement
- Differences between customer groups
- Sentiment changes over time
- Friction points in the customer journey
- Issues tied to specific products, services, or teams



Suggested Outputs

- Customer pattern report
- Top recurring themes
- Pain point analysis

3



Segment Customers

- Group feedback by new customers, returning customers
- High-value customers, at-risk customers
- Product or service used
- Industry or region
- Satisfaction level



Suggested Outputs

- Customer segment definitions
- Segment-specific feedback summaries
- Segment comparison report

4



Choose One Improvement Project

- Select one project using frequency of issue
- Customer satisfaction impact
- Feasibility
- Business alignment
- Measurable improvement as decision criteria



Suggested Outputs

- Selected improvement project
- Problem statement
- Project scope
- Success criteria
- Implementation plan



End of Days 31–60: AI summaries, pattern analysis, customer segments, and one priority improvement project are defined.



90-Day AI Customer Insight Plan



Days 61–90: Act, Measure, and Scale

Goal: implement the improvement, measure results, and create an ongoing customer insight rhythm.

1



Assign Owners

- Assign a project owner
- Identify supporting team members
- Define roles and responsibilities
- Set deadlines and decision points
- Establish a communication rhythm



Suggested Outputs

- Ownership chart
- Project timeline
- Responsibility matrix

2



Implement Changes

- Update a process
- Improve communication with customers
- Adjust a product or service feature
- Revise training or support materials
- Change follow-up procedures
- Improve response times or escalation paths



Suggested Outputs

- Implemented improvement
- Change documentation
- Updated process or resource materials

3



Track KPIs

- Monitor customer satisfaction
- Monitor complaint volume
- Monitor issue resolution time
- Monitor sentiment score
- Monitor retention or renewal rate
- Monitor repeat contact rate
- Monitor adoption or usage data
- Monitor customer comments related to the improvement area



Suggested Outputs

- KPI tracking dashboard
- Before-and-after comparison
- Early impact report

4



Build Monthly Reporting Rhythm

- Schedule a monthly insight review meeting
- Share key findings with leadership and teams
- Review new patterns and emerging issues
- Track progress on active projects
- Decide whether to scale, revise, or replace the current project



Suggested Outputs

- Monthly customer insight report
- Recurring review meeting
- Updated action list
- Ongoing improvement pipeline



By Day 90

- ✓ Structured feedback process
- ✓ Organized customer insight database
- ✓ Defined insight categories

- ✓ Baseline metrics
- ✓ AI-supported summaries and pattern analysis
- ✓ One completed or active improvement project

- ✓ Assigned ownership
- ✓ KPI tracking
- ✓ Monthly reporting rhythm



The organization moves from collecting feedback to using customer insight as a disciplined, measurable decision-making process.



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9515 N Spring Valley Dr
Pleasant Hope, MO 65725
800-224-3731
417-759-9110
(voice/fax)

www.themathisgroup.com

keith@themathisgroup.com
wanda@themathisgroup.com

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