

investigate

RESOURCE GUIDE

verb

**carry out research to discover
and understand the needs,
behaviors, and desires of your
customer**

COMPANION TOOLS & TEMPLATES FOR
RESEARCHING YOUR MARKET & CUSTOMER

CUSTOMER *avatar*

1. CUSTOMER AVATAR WORKSHEET

WHAT IT IS:

A comprehensive worksheet to define your ideal customer in detail—from demographics to psychographics to daily habits.

HOW TO USE IT:

1. Give your customer a name (e.g., "Sarah")
2. Fill out all 8 sections (demographics, psychographics, pain points, day in the life, jobs-to-be-done, where they hang out, buying behaviour, language they use)
3. Print and keep visible while creating ALL marketing materials
4. Reference this avatar every time you write copy, create content, or make business decisions



Download: [Customer Avatar Worksheet](#)



Tip: The more specific you are, the more effective your marketing will be. "Everyone" is not a customer avatar.

COMPETITIVE ANALYSIS

matrix

3: COMPETITIVE ANALYSIS MATRIX

WHAT IT IS:

A spreadsheet/table to compare 5-10 competitors side-by-side and identify gaps you can fill.

HOW TO USE IT:

1. List 5-10 direct competitors
2. Visit their websites, social media, and review sites
3. Read at least 20 reviews per competitor (Google, Yelp, Facebook, Amazon)
4. Fill out the matrix
5. Identify patterns: What do customers consistently love? What do they complain about?
6. Find YOUR gap: What can you offer that no one else does?



Download: [Competitive Analysis Matrix Sheet](#)



Tip: Use this matrix to craft your unique positioning statement.

REFERRAL *partners*

3: COMPLEMENTARY BUSINESSES & REFERRAL PARTNERS LIST

WHAT IT IS:

A simple list template to identify 20 businesses that serve your customer but aren't direct competitors.

HOW TO USE IT:

1. List businesses that serve your customer BEFORE they need you
2. List businesses that serve your customer AFTER they use your service
3. List businesses that serve your customer in adjacent areas
4. Research 20 complementary businesses
5. Reach out to 5 this month with a partnership proposal



Download: [Referral Partners Sheet](#)



Tip: These are your future referral partners. Build relationships now, even before you launch.

PRICING *research*

4. PRICING RESEARCH WORKSHEET

WHAT IT IS:

A guided worksheet to research competitor pricing, survey customer willingness to pay, calculate your costs, and decide your positioning (budget/mid-tier/premium).

HOW TO USE IT:

1. Research 5-10 competitors' pricing (low-end, mid-tier, high-end)
2. Survey your audience: "What would you expect to pay for [your service]?"
3. Calculate your costs (time + materials)
4. Decide your positioning: Budget, Mid-Tier, or Premium
5. Test 3 price points with your audience



Download: [Pricing Research Sheet](#)



Tip: Don't price based on what YOU think is fair. Price based on what your CUSTOMER values and what the MARKET supports.

MARKET SIZE

5. MARKET SIZE & OPPORTUNITY WORKSHEET

WHAT IT IS:

A research worksheet to determine how big your market is, whether it's growing, and what trends are shaping it.

HOW TO USE IT:

1. Google "[your industry] market size" and "[your industry] trends 2025"
2. Use census data, industry reports, and Google Trends
3. Answer: How many people fit your ideal customer profile?
4. Answer: How much does this market spend annually on solutions like yours?
5. Summarize your market opportunity in 3 bullet points



Download: [Market Size & Opportunity Worksheet](#)



Tip: Use this in your business plan or pitch deck to show investors/partners that there's a real opportunity.

INDUSTRY EMAIL BENCHMARKS

- Average open rate in my industry: _____%
- Average click rate in my industry: _____%
- Average email list size for successful businesses: _____
- Recommended email frequency: _____ emails per week/month

Source: _____ (Mailchimp, HubSpot, Campaign Monitor)

MARKET SIZE

Opportunity

6. MARKET SIZE & OPPORTUNITY WORKSHEET

EMAIL MARKETING SWIPE FILE

WHAT IT IS:

A tracking worksheet to analyze competitor email strategies, industry benchmarks, and collect the best email examples for inspiration.

HOW TO USE IT:

1. Sign up for 10 competitors' email lists
2. Track their welcome sequences, email frequency, tone, subject lines, and offers
3. Research industry email benchmarks (open rates, click rates, list size)
4. Save the 10 BEST emails you receive in a swipe file
5. Note what makes them work (subject lines, CTAs, storytelling, etc.)



Download: [Email Marketing Swipe Sheet](#)

Tip: Create a Gmail folder or Google Drive folder titled "Email Swipe File." Save every great email you receive. Reference it when writing your own.

VALIDATION *Tracker*

7. VALIDATION TRACKER

WHAT IT IS:

A tracking worksheet for 4 validation methods: Pre-sell, Landing Page Test, Survey, or Pilot Program.

HOW TO USE IT:

1. Choose ONE validation method
2. Set a goal (e.g., 10 pre-sell commitments, 50 survey responses)
3. Track your results
4. Analyze feedback and objections
5. Make adjustments before full launch

💡 **Tip: Do NOT skip validation. This step will save you months of wasted effort and money.**

VALIDATION

CHOOSE YOUR VALIDATION METHOD

- ☐ Pre-sell (Offer before it's built)
- ☐ Landing page test (Measure interest)
- ☐ Survey (Ask if they'd buy)
- ☐ Pilot program (Beta version at discount)

📄 **Download:** [Validation Tracker Sheet](#)

Total commitments: _____ / 10

Total revenue: \$ _____

SOCIAL MEDIA *research*

8. SOCIAL MEDIA & ONLINE RESEARCH TRACKER

WHAT IT IS:

A tracker to analyze where your customer hangs out online, what competitors are posting, and what language your audience uses.

HOW TO USE IT:

1. Join 5 online communities where your customer hangs out
2. Spend 30 days LISTENING
3. Track competitor social media (platforms, posting frequency, engagement, hashtags)
4. Screenshot the language your audience uses (pain points, questions, objections)
5. Use this language in your marketing copy

📄 **Download:** [Social Media Research Tracker Sheet](#)

📄 **Download:** [Social Media Competitor Tracker Sheet](#)

💡 **Tip:** Your customers are already telling you what they need. You just have to listen.

EMAIL marketing

9. EMAIL MARKETING SWIPE FILE

WHAT IT IS:

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1. Sign up for 10 competitors' email lists
2. Track their welcome sequences, email frequency, tone, subject lines, and offers
3. Research industry email benchmarks (open rates, click rates, list size)
4. Save the 10 BEST emails you receive in a swipe file
5. Note what makes them work (subject lines, CTAs, storytelling, etc.)

💡 **Tip:** Create a Gmail folder or Google Drive folder titled "Email Swipe File." Save every great

📄 **Download:** [Email Marketing Swipe Sheet](#)

INDUSTRY EMAIL BENCHMARKS

- Average open rate in my industry: _____%
- Average click rate in my industry: _____%
- Average email list size for successful businesses: _____
- Recommended email frequency: _____ emails per week/month
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Source: _____ (Mailchimp, HubSpot, Campaign Monitor)

📄 **Download:** [Best Email Swipe Sheet](#)

QUICK Link

10: QUICK LINKS & TOOLS

ADDITIONAL MARKET RESEARCH TOOLS

CUSTOMER RESEARCH

SURVEY & FORM TOOLS

- GOOGLE FORMS - FREE, EASY-TO-USE SURVEY BUILDER WITH AUTOMATIC DATA COLLECTION
- TYPEFORM - BEAUTIFUL, CONVERSATIONAL SURVEYS WITH ADVANCED LOGIC AND INTEGRATIONS
- SURVEYMONKEY - ROBUST SURVEY PLATFORM WITH TEMPLATES, ANALYTICS, AND REPORTING TOOLS

SOCIAL MEDIA RESEARCH

AUDIENCE & ENGAGEMENT ANALYTICS

- FACEBOOK AUDIENCE INSIGHTS - ANALYZE DEMOGRAPHICS, INTERESTS, AND BEHAVIORS OF YOUR FACEBOOK AUDIENCE
- INSTAGRAM INSIGHTS - IN-APP ANALYTICS FOR INSTAGRAM BUSINESS ACCOUNTS (TRACK REACH, ENGAGEMENT, DEMOGRAPHICS)
- SOCIAL BLADE - TRACK SOCIAL MEDIA STATISTICS, GROWTH TRENDS, AND COMPETITOR PERFORMANCE ACROSS PLATFORMS
- BUZZSUMO - DISCOVER TRENDING CONTENT, ANALYZE COMPETITOR PERFORMANCE, AND FIND INFLUENCERS
- HASHTAGIFY - RESEARCH HASHTAG POPULARITY, TRENDS, AND RELATED HASHTAGS FOR INSTAGRAM, TWITTER, AND TIKTOK

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COMPETITOR RESEARCH

COMPETITIVE INTELLIGENCE TOOLS

- GOOGLE ALERTS - GET EMAIL NOTIFICATIONS WHEN YOUR COMPETITORS ARE MENTIONED ONLINE
- FACEBOOK ADS LIBRARY - SEE ALL ACTIVE ADS FROM ANY FACEBOOK OR INSTAGRAM ACCOUNT (FREE AND PUBLIC)
- SimilarWeb - Analyze competitor website traffic, sources, audience demographics, and top pages

QUICK

INDUSTRY & CONSUMER TREND RESEARCH

- GOOGLE TRENDS - EXPLORE SEARCH TRENDS, COMPARE KEYWORDS, AND DISCOVER RISING TOPICS BY REGION AND TIME
- STATISTA - ACCESS STATISTICS, MARKET DATA, AND INDUSTRY REPORTS (FREE AND PREMIUM TIERS)
- IBISWORLD - IN-DEPTH INDUSTRY RESEARCH REPORTS, MARKET ANALYSIS, AND FORECASTS (SUBSCRIPTION-BASED)

EMAIL MARKETING BENCHMARKS

INDUSTRY STANDARDS & BEST PRACTICES

- MAILCHIMP EMAIL MARKETING BENCHMARKS - AVERAGE OPEN RATES, CLICK RATES, AND UNSUBSCRIBE RATES BY INDUSTRY
- HUBSPOT EMAIL MARKETING STATISTICS - COMPREHENSIVE EMAIL MARKETING STATS, TRENDS, AND BENCHMARKS



NEED HELP?



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