



ASCENDEA

AI / BUSINESS GROWTH / GUIDE & WORKBOOK

Audience Insight Framework — Evidence-Led Content Planning Workbook

A practical, evidence-led workbook for UK small-business owners and managers. It shows how to gather customer signals responsibly, build a usable working persona, map questions and context, prioritise content topics, and maintain a repeatable insight-review routine without making performance promises.



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Chapter links and PDF bookmarks support navigation. Writing areas are for handwritten or separate notes, not interactive PDF forms.

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A practical workbook for UK small-business owners and managers who want their content to begin with real customer evidence.

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What you will produce

This workbook helps you turn scattered customer signals into a small, usable content plan. By the end, you should have:

- an organised **insight log** that separates quotes and observations from your own interpretation;
- one **working persona** based on evidence, not a fictional biography;
- an **empathy map** that makes assumptions visible and testable;
- a ranked list of content topics; and
- a short action plan with a named owner and review date.

This is not a shortcut to guaranteed traffic, enquiries or sales. Its value is in making your next content decisions more informed, more relevant and easier to explain.

Before you collect audience insight

Audience research can involve people as well as ideas. A customer's name, work email address, direct message, complaint or interview note may be personal data. The ICO explains that UK GDPR covers information relating to an identified or identifiable living person, including a named employee or an identifiable sole trader. [1]

Use the lightest approach that will answer your question. Collect only what you need, keep it in an appropriate private location, and avoid placing customer names, sensitive details or private messages in a shared content-planning file. Remove identifiers from working notes where possible. A quote is useful only when you know its context and have the right to use it.

If you invite people to respond by email or use business-contact data for marketing, check the current ICO guidance first. PECR treats companies and LLPs differently from sole traders and certain partnerships, while UK GDPR can still apply when a contact is identifiable. The ICO guidance is under review following the Data (Use and Access) Act, so recheck it before a campaign. [2] This workbook is general education, not legal advice.

Protect the accounts and files that hold your notes. Give access only to people who need it, use the account protections offered by your provider, and consider multi-factor authentication or passkeys where available. The NCSC provides practical guidance for small organisations and for stronger sign-in methods; it does not make any business automatically secure or compliant. [3] [4]

Four labels to use throughout the workbook

Label	What it means	Example
Evidence	A dated, traceable observation or a permitted customer statement.	"Four support emails this month asked how to book an emergency visit."
Interpretation	Your reasoned reading of several pieces of evidence.	"Speed of booking appears more important than a detailed explanation."
Hypothesis	A plausible idea that still needs checking.	"A short 'what happens next' video may reduce uncertainty."
Decision	An action you will take, who owns it and when you will review it.	"Sam will draft the booking explainer by 14 November; review its questions after four weeks."

Do not present a hypothesis as a customer fact. This single habit stops a persona or empathy map becoming an attractive guess.

The framework at a glance

Phase	Purpose	Practical output	Complete when
1. Gather	Find real language, questions, objections and behaviours.	Insight log with sources and dates.	You have enough relevant signals to see repeated patterns, not merely one loud opinion.

Phase	Purpose	Practical output	Complete when
2. Focus	Turn patterns into a small, evidence-led working persona.	One-page persona and validation notes.	The persona changes a real content decision.
3. Plan	Use the persona and empathy map to select useful topics and formats.	Prioritised topic list and content theme.	An owner can explain what to create next, for whom and why.
4. Refresh	Compare what happened with what you expected.	Updated evidence, decision log and next review date.	Old assumptions are corrected rather than carried forward.

Phase 1 — Gather useful evidence

Start with one decision, not a pile of research

Write the decision you need to make before opening a spreadsheet. Good questions are narrow enough to answer and connected to a business choice.

- A heating engineer might ask: “What information do homeowners need before they decide to request a boiler repair visit?”
- A B2B bookkeeping firm might ask: “Which concerns delay a finance manager from moving from spreadsheets to a monthly reporting service?”
- An independent retailer might ask: “What stops repeat customers from using our online collection service?”

Avoid a question such as “What content should we make?” It is too broad. Instead, identify one audience, one situation and one decision.

Set up an insight log

Use a spreadsheet or a protected document. Give every item a source, date and label. A short paraphrase is often safer and more useful than copying a long private message. If a person can be identified, record only the minimum detail needed to understand the context.

Date	Source and context	Exact words or careful paraphrase	Theme	Label	Confidence	Follow-up needed?
_____	_____	_____	_____	Evidence / interpretation / hypothesis	High / medium / low	_____
_____	_____	_____	_____	Evidence / interpretation / hypothesis	High / medium / low	_____
_____	_____	_____	_____	Evidence / interpretation / hypothesis	High / medium / low	_____
_____	_____	_____	_____	Evidence / interpretation / hypothesis	High / medium / low	_____

Confidence here is not a statistic. It is a practical reminder of how directly the item answers your question. A recent customer interview about the exact problem is usually stronger than a general online comment from an unknown person.

Method 1: ask people directly

A brief, focused question can uncover language that search tools will not show. Start with existing customers, recent enquirers or people who have already agreed to speak with you. Choose a channel and contact list you are entitled to use. Do not add people to a marketing list simply because they answered a research question.

One-question email or message

1. Choose one relevant group. For example, recent customers of a local accountancy practice who used its payroll service.
2. Decide the single issue you are exploring. Do not combine three questions in one message.
3. Check that your contact information, privacy information and any marketing use are appropriate for the recipient and channel. If you are unsure, use the more protective route or seek advice.
4. Send a short, truthful request. State why you are asking and make it easy to decline.

5. Record the themes, not just the replies that support your existing view.
6. Thank respondents where appropriate. Ask before using a named or attributable quotation publicly.

Adaptable research invitation

Subject: A quick question about [topic]
 Hello [Name],
 We are improving our guidance about [specific topic] for [relevant customer group]. If you are happy to share, what is the one part of [task/problem] you find most difficult or unclear?
 A sentence or two is enough. We will use responses to improve our planning and will not publish an attributable quotation without permission.
 Thank you,
 [Name, business name and an appropriate contact route]

If this message promotes an offer, begins an outreach sequence or uses publicly sourced contact information, it may trigger additional UK GDPR/PECR considerations. Check the ICO guidance rather than assuming that “business to business” removes those duties. [2]

Short problem conversations

A short conversation can give richer context than a survey answer. Ask for permission to take notes. Keep the conversation about the person's experience, not their private life.

Use open prompts:

1. “Can you talk me through the last time this happened?”
2. “What did you try first?”
3. “What made that difficult or frustrating?”
4. “What information would have made the next step easier?”
5. “How would you describe the problem to a colleague?”
6. “Is there anything I have misunderstood?”

Write down the setting, not just a memorable phrase. “I cannot get anyone to answer” means something different for an emergency plumber at 8pm than for a professional-services buyer comparing suppliers during a procurement process.

Method 2: review existing conversations with care

People discuss problems in reviews, public comments, relevant video-comment threads, forums, Q&A threads and community groups. These are leads for a research question, not permission to lift someone's words into an advert or expose their identity.

1. Choose two or three places where your likely customers genuinely discuss the topic.
2. Review a manageable, recent sample. Include both positive and critical comments.
3. Note the problem, desired outcome, wording and context in your log.
4. Add a link or source reference so you can check the original context later.
5. Paraphrase or anonymise in working notes unless you have a clear reason and permission to quote.
6. Look for a pattern across sources before treating it as a theme.

For a local retail business, comments might reveal that shoppers ask whether an item is in stock before travelling. For a managed IT provider, they may reveal uncertainty about what "ongoing support" includes. The useful insight is not the exact wording alone; it is the situation that created the question.

Method 3: use your own customer-service evidence

Your inbox, helpdesk, order notes and website enquiries can be particularly relevant because they concern people already interacting with your business. They may also contain personal, confidential or sensitive information.

1. Agree who is allowed to review the material.
2. Work from a small, relevant and recent sample.
3. Remove names, contact details, order numbers and unnecessary context from the working log.
4. Group repeated questions or points of confusion.
5. Record what the customer was trying to do, not only what they typed.
6. Check whether the apparent theme is a content problem, a service-design problem or both.

Do not use private support conversations in a public case study without permission. Do not upload unredacted customer correspondence to an AI tool unless you have assessed whether that use is authorised and appropriate.

Method 4: use search and trend signals carefully

Search tools are useful for discovering wording and seasonal questions. They do not tell you what every customer thinks, nor do they replace a conversation with your own audience.

Google autocomplete

1. Open a private browser window or note the location and account state you are using, as results may vary.
2. Type a service or problem phrase, such as “bookkeeper for” or “boiler repair how”.
3. Try question starters: **how**, **why**, **when**, **cost**, **versus**, **near me** where relevant.
4. Copy only the suggestions relevant to your genuine service and audience.
5. Add each suggestion to the insight log as a **signal to investigate**, not proof of demand.

Google describes autocomplete as a time-saving feature generated by automated systems. It is not simply a list of the most common queries and should not be compared directly with Google Trends. [5]

Google Trends

1. Go to [Google Trends Explore](#).
2. Enter up to a few closely related terms. Set the country and time range to match the market you actually serve; a UK business should not assume US patterns apply.
3. Check interest over time for seasonality or a change worth investigating.
4. Review related topics and related queries. Use **Top** for commonly associated ideas and **Rising** for changes receiving more attention.
5. Save the date range, location and terms used in your log.
6. Cross-check a promising signal against customer questions, Search Console data or a conversation before commissioning content.

Google says Trends uses a sampled, anonymised and aggregated set of searches, normalised to make relative comparisons easier. It is not a scientific poll and a spike does not prove that a topic is popular for your particular audience. [6] Google's Search Central guidance also advises choosing topics that fit your business and users rather than writing about something solely because it is trending. [7]

Method 5: learn from competitors and industry sources without copying

Competitor content, reviews of comparable services, newsletters and popular industry books can reveal what is already being explained and what readers still find unclear.

1. List three to five comparable businesses, publications or products.
2. Review their publicly available content, comments and customer questions.
3. Note recurring topics, unanswered questions, jargon and content formats.
4. Compare these notes with your own first-party evidence.
5. Write a gap as a question you could answer from your real expertise.

Do not imitate an article simply because it is well shared. Do not present a competitor's customer story, review or figures as your own. A gap may be an opportunity to explain something more clearly, locally or honestly—not a reason to copy their work.

Choose a balanced evidence mix

Aim to combine at least two appropriate methods. For example, a small electrical contractor could compare recent enquiry themes with short conversations and search wording. A B2B consultancy could combine sales-call notes, service questions and an analysis of industry discussions.

If all your evidence comes from a single platform, audience segment or frustrated customer, write that limitation down. A narrow dataset can still guide a small test; it should not become a universal claim about “what customers want”.

Worksheet 1 — Research plan and evidence summary

Your research plan

Prompt	Your notes
The specific decision this research should inform	_____
Audience segment and situation	_____
What we already know	_____
What we are assuming	_____
Two research methods we will use	_____
Data/privacy checks needed before we begin	_____
Owner	_____
Start date and review date	_____

Pattern summary

Repeated problem or question	Supporting sources	Exact customer language or careful paraphrase	What it may mean	Confidence / limitation
—	—	—	—	—
—	—	—	—	—
—	—	—	—	—
—	—	—	—	—

Phase 2 — Build a persona that guides decisions

A useful persona is a compact, evidence-led description of one priority audience in a particular buying or problem-solving situation. It is not a fictional life story, a demographic stereotype or a claim that every customer behaves the same way.

Step 1: cluster the evidence

1. Read your insight log without trying to write the persona immediately.
2. Highlight recurring problems, goals, words, objections, information habits and moments that trigger action.
3. Separate direct evidence from your interpretation.
4. Identify the segment where these patterns appear most consistently.
5. Choose one content decision the persona must help you make, such as the next guide, landing page or email series.

Keep unnecessary personal characteristics out. A favourite coffee, age bracket or family detail belongs only if it directly changes a legitimate content decision and you have a sound reason to hold it. Do not turn sensitive personal information into a marketing profile.

Step 2: draft one working persona

Give the persona a functional name such as “Facilities manager handling urgent maintenance” rather than a made-up full identity. This keeps the focus on a real context and avoids implying an individual customer is being profiled.

One-page persona worksheet

Persona element	Evidence or hypothesis	How this changes our content
Audience and situation — who is this and what are they trying to do?	_____	_____
Core job or goal	_____	_____
Top frustrations	_____	_____
Words they use	_____	_____
Questions or objections	_____	_____
Current workaround	_____	_____
Information habits — where and when they look for help	_____	_____
Decision trigger — what makes action timely?	_____	_____
Boundary — what do we not know yet?	_____	_____

Fictional planning example: a local professional-services buyer

The following is a fictional teaching example, not an Ascendea client or a research finding.

Persona element	Evidence or hypothesis	How this changes content
Audience and situation	Operations manager at a growing UK professional-services firm preparing for a busy quarter.	Create content for an operational decision-maker, not general “business owners”.
Core job or goal	Wants a dependable way to keep enquiries from being missed while maintaining a personal client experience.	Explain the process and responsibilities, not only software features.
Top frustrations	Evidence to test: several conversations mention a shared inbox, unclear ownership and repeated follow-ups.	Produce an explainer on enquiry handovers and a checklist for assigning ownership.

Persona element	Evidence or hypothesis	How this changes content
Words they use	"Follow-up", "hand-off", "chasing", "no one owns it".	Use these terms where they remain accurate and clear.
Decision trigger	A busy period, new staff member or a visible missed-enquiry incident.	Time the content around planning for workload, not a generic urgency claim.
Boundary	No evidence yet about budget, preferred platforms or whether automation is acceptable.	Do not publish price, platform or automation claims as though the buyer has asked for them.

Step 3: validate the draft

A persona is a working document. Test it before letting it drive a quarter of content.

1. Trace each key statement back to evidence in the log. Mark unsupported statements as hypotheses.
2. Ask one or two colleagues who hear customer questions whether the description is recognisable and specific.
3. Where appropriate and permitted, ask a small number of relevant customers whether the problem framing makes sense. Do not ask them to validate private assumptions about their feelings.
4. Use the persona to make one content decision.
5. Record what happened. Revise the persona if the content did not address the actual question or attracted the wrong audience.

Persona quality check

Check	Yes / no / needs work	Note or evidence
Is the audience defined by a relevant situation, not a stereotype?	_____	_____
Can we point to evidence for each major problem and phrase?	_____	_____
Does it distinguish facts from assumptions?	_____	_____
Would two colleagues make a similar content choice from it?	_____	_____

Check	Yes / no / needs work	Note or evidence
Does it tell us what to leave out as well as what to include?	_____	_____
Is there a review date?	_____	_____

Avoid four common traps: combining unrelated fragments into a “Frankenstein” profile; adding details that do not affect a decision; creating so many personas that no one uses them; and treating an old persona as current evidence.

Phase 3 — Map context, questions and emotion responsibly

An empathy map is a way to organise what a person says, thinks, does and feels around a particular task. It is not a licence to speculate about private fears or to manipulate someone. Use it to identify where your content can reduce confusion, explain options or set realistic expectations.

Use the four quadrants correctly

Quadrant	What belongs here	Stronger sources	Caution
Says	Public questions, direct interview statements and stated objections.	Permitted interviews, public comments, reviews, support questions.	Attribute or quote only with appropriate permission and context.
Thinks	An interpretation of an unstated concern or belief.	Repeated objections, anonymous feedback, careful follow-up questions.	Label as a hypothesis. Do not pretend to know someone's private thoughts.
Does	Observable actions, workarounds and steps in the current journey.	User testing, permitted analytics, process mapping, service records.	Describe only what you are entitled to observe and use.
Feels	Emotions explicitly expressed or reasonably indicated by words and context.	Direct statements, survey responses, interview wording.	Do not diagnose anxiety, stress or other health conditions from marketing data.

Empathy-map worksheet

Says — evidence	Thinks — hypotheses to test
_____	_____
_____	_____
_____	_____

Does — observable behaviour	Feels — evidence-led emotion or concern
_____	_____
_____	_____
_____	_____

Turn the map into content opportunities

1. Look for repeated themes across the four quadrants.
2. Note a tension, such as someone saying they want a quick fix while also worrying about hidden costs.
3. Ask what honest content would help at that moment. It may be a checklist, clear pricing explainer, comparison, process guide or a reasoned “not suitable if” page.
4. Write the audience question in their language, then verify that you can answer it accurately.
5. Add a content idea only if it serves the audience and fits your actual expertise.

Pattern or tension	Evidence / hypothesis	Content opportunity	What must be checked before publishing
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Prioritise topics without pretending the score predicts results

A score does not prove a topic will perform. It simply makes the trade-offs visible when you have more ideas than capacity.

Use the source framework's **Serve Score** as a simple planning aid:

$$\text{Serve Score} = (\text{Audience impact} \times \text{Business relevance}) \div \text{Effort}$$

Rate each factor from 1 to 5. Define the scale for your team before scoring. For example, **impact** is the likely usefulness to the priority audience if the content is accurate; **business relevance** is its fit with your legitimate offer and expertise; **effort** includes research, drafting, checking, approval and production.

Add an **evidence confidence** note separately. A high numerical score based on a weak assumption is a research task, not an automatic publishing priority.

Topic-prioritisation worksheet

Topic or customer question	Audience impact 1–5	Business relevance 1–5	Effort 1–5	Serve Score	Evidence confidence	Decision / next check
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—

Fictional calculation: A clear guide answering a repeated question might be scored 4 for audience impact, 5 for business relevance and 2 for effort: $(4 \times 5) \div 2 = 10$. That makes it a sensible candidate to test, not a promise of reach, leads or revenue.

Build one content theme

A theme links several pieces of content to one recurring audience need. It stops a small business from publishing disconnected ideas simply because they were easy to write that week.

Fictional planning example: A small facilities-maintenance provider finds that prospective clients are unclear about what happens after an urgent request. Its theme could be “**Knowing what happens next**”, with:

- a plain-language web page explaining the request-to-visit process;
- a checklist of information to have ready when reporting a fault;
- a short post on how the business distinguishes routine and urgent requests; and
- a follow-up email for existing clients, sent only where appropriate, explaining the same process.

None of these pieces should claim response times, savings or outcomes unless the business can substantiate them and the wording matches its real service.

Content-theme planner

Audience need or question	Content format	Main message	Evidence to include or verify	Owner	Target review date
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

A practical 90-day action sequence

Adapt the pace to your capacity. The dates below are planning prompts, not a guarantee that research or content will produce commercial results.

This week: choose and collect

1. Choose one audience segment, one situation and one decision.
2. Create the insight log and agree who can access it.
3. Select two appropriate research methods.

4. Complete the privacy, permissions and security checks before collecting customer material.
5. Capture the first observations without trying to write the finished content immediately.

Next week: find patterns and draft the persona

1. Group your findings into repeated problems, goals and words.
2. Complete the research summary and one-page persona.
3. Mark hypotheses clearly.
4. Ask a relevant colleague to challenge the draft.
5. Decide one content question that the persona will help answer.

Within 30 days: plan and test

1. Complete the empathy map for the chosen situation.
2. List potential topics and score them consistently.
3. Select one modest content theme.
4. Draft or commission the first piece with its evidence and approval requirements visible.
5. Record the measure that will tell you whether the content is being understood—for example, the types of questions it receives, not only page views.

By 90 days: review and decide

1. Review the questions, responses and outcomes associated with the content.
2. Compare them with the persona and hypotheses.
3. Keep, amend or stop the content theme based on what you learned.
4. Set the next research refresh date.
5. Record one decision, its owner and the evidence still needed.

Repeatable insight-review routine

This beginner-friendly routine turns audience research into an ongoing practice rather than a one-off workshop.

SOP element	Definition
Owner	Name one person accountable for the review: _____

SOP element	Definition
Trigger	A monthly content review, a notable change in customer questions, or a scheduled quarterly refresh.
Inputs	Insight log, relevant content responses, service/support themes, permitted customer feedback and any selected search trends.
Output	Updated pattern summary, decision log, one prioritised next action and a review date.
Exception / human fallback	Stop and involve the appropriate manager, privacy lead or qualified adviser if notes contain sensitive data, a customer objects, consent/permission is unclear, a claim cannot be verified, or a security incident is suspected. Use the existing manual customer-support or approval process rather than publishing or automating a response.

Numbered routine

1. **Collect:** Add only relevant, permitted observations to the log. Do not paste passwords, customer IDs, medical details, payment information or confidential client material into the workbook.
2. **Sort:** Tag each item as evidence, interpretation, hypothesis or decision. Group similar items.
3. **Check:** Ask whether a pattern appears across more than one relevant source. Record limitations.
4. **Decide:** Choose one action: research further, create content, improve a service explanation, revise an existing page or do nothing yet.
5. **Assign:** Write the owner, due date and required check. Make no unsupported claim simply to meet a publishing date.
6. **Review:** At the next review, record what happened. Update or retire the persona if the evidence has changed.

Maintenance calendar

Cadence	Activity	Owner	Output
Weekly or when practical	Review new questions, comments and support themes.	_____	Added insight-log notes.

Cadence	Activity	Owner	Output
Monthly	Review the content questions that attracted useful or confused responses.	_____	One learning and one possible action.
Quarterly	Refresh the research summary and check the persona against new evidence.	_____	Revised persona or a note that it remains supported.
Twice yearly	Revisit the empathy map and content themes.	_____	Retired assumptions, new hypotheses and a decision log.

Final decision and action record

Complete this page before leaving the workbook. It turns your research into a next step.

Prompt	Your decision
The audience situation we understand best today	_____
The strongest evidence we have	_____
The most important assumption still to test	_____
The content question we will answer next	_____
The content format and honest boundary	_____
Evidence, permissions or specialist review needed before publication	_____
Named owner	_____
Target completion date	_____
What will make us revise or stop this plan	_____
Next insight-review date	_____

Final quality check

Before using a persona, empathy map or content plan, check the following.

Check	Complete?	Note
We can trace major claims about the audience to dated evidence.	_____	_____
We have marked hypotheses and do not treat them as facts.	_____	_____
We have minimised personal data and protected the working notes.	_____	_____
We have not copied competitor material or used a customer quote without permission.	_____	_____
The planned content reflects our real service, experience and limits.	_____	_____
Claims, prices, timings and results are verified or clearly labelled as illustrative.	_____	_____
A named person owns the next action and the review date.	_____	_____

Publication and use notice

Author of this Ascendea edition: **Rob Arnold**. Publisher: **Ascendea**. Website: <https://ascendea.ai/>.

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This is general business education, not legal, data-protection, security or professional advice. Technology, platform features and UK guidance can change. The official sources below were checked on **9 October 2026**; recheck them before implementation. This finished edition is available as a free Ascendea resource.

References and verification notes

[1] [Information Commissioner's Office — What is personal data?](#) — definition of personal data, including identifiable individuals acting as employees, sole traders, partners or company directors. Guidance is marked under review following the Data (Use and Access) Act.

[2] [Information Commissioner's Office — Business-to-business marketing](#) — PECR's corporate/individual subscriber distinction, UK GDPR applicability to identifiable business contacts, objections and transparency. Guidance is marked under review.

[3] [National Cyber Security Centre — Small organisations guide to cyber security](#) — practical small-organisation guidance on backups, devices, accounts and scams.

[4] [National Cyber Security Centre — Multi-factor authentication for corporate online services](#) — guidance on selecting and applying strong MFA for organisational online services.

[5] [Google Search Help — How Google autocomplete predictions work](#) — autocomplete is a time-saving feature and is not simply a ranking of common queries.

[6] [Google Trends Help — FAQ about Google Trends data](#) — sampled, anonymised and aggregated data; normalisation and limitations; Trends is not a scientific poll.

[7] [Google Search Central — Get started with Google Trends](#) — use related topics and queries carefully, set relevant locations, and make content for the business and its users rather than a trend alone.

Editorial note: All examples in this workbook are fictional planning examples unless expressly identified as a sourced statement. No income, traffic, conversion, health or performance outcome is promised.