Cassi.ai

FREE E-BOOK

Using Cassi.ai:

Your Personal Market Research Expert

A comprehensive how-to guide for getting started with and mastering Cassi.ai

ABOUT
The Man Behind the Machine

My name is Cassiano and I have 15 years of sales, product innovation, marketing, and leadership experience in the market research and insights sectors across the globe. I have led multicultural teams in tracking data analytics and leveraging market analyses to drive sales strategies, exceed targets, and push the boundaries of what's possible in market research. Throughout my entire career, I have been consistently committed to simplifying and enhancing how businesses gather, interpret, and utilize data—and now I want to help you use AI to do the same.

Connect on LinkedIn

Welcome to Cassi.ai, an innovative, AI-powered market research assistant designed to revolutionize how businesses approach data analysis and market insights. At the heart of this cutting-edge technology is my passion for innovation and excellence in the AI B2B SaaS and market research industries.

Are you ready to transform your business with the power of AI-driven insights? Join me on this exciting journey. Feel free to send me a message for help getting started, and let's revolutionize the world of market research together!

www.cassiai.com

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Contents

Welcome to the **Free E-Book** *Using Cassi.ai: Your AI-Powered Market Research Assistant*. This comprehensive how-to guide is designed to help you understand exactly how to get started and leverage the full potential of Cassi.ai. Whether you're kicking off a new research project or need help programming a survey, this e-book will provide you with the basic knowledge and tools needed to streamline your work and excel, *for free*.

The free trial version of Cassi.ai can be used to:

1. **Create a Research Briefing:** Outline the research plan, objectives, methodology, and expected outcomes.
2. **Create a Research Survey:** Develop a questionnaire or survey and generate questions to collect data from your users.
3. **Generate a Google Forms Script:** Create a script to automate the survey development and data collection process.

COMING SOON

Keep an eye out for the paid version of Cassi.ai—offering even more customized support and advanced solutions!

Getting Started
with Cassi.ai

1. Visit **www.cassiai.com** and click in "type your answer" to get started.

Getting Started with Cassi.ai

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2. Type or paste in the background information about your project, followed by the action or request you need Cassi.ai's help with. Then hit enter and see your results instantaneously!
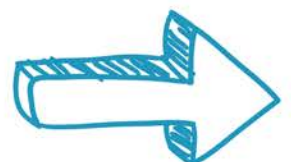
In general, you should enter this background information to adequately prepare Cassi.ai to fulfill your request:

1. **Project topic**

2. **Target audience**

3. **Objective**

4. **Sample size**

QUICK TIPS

The more background info you enter, the more accurate Cassi.ai will be.

5. **Type of methodology**

6. **Type of study**

7. **Final action / request**

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Getting Started with Cassi.ai

When starting a new project, give Cassi.ai as much detail as possible for best results. Below is an explanation of the information you should provide for best results:

1. Project Topic
- Clearly define the subject or theme of your research. This could be a market segment, product, service, or social issue.

2. Target Audience
- Specify who you are researching or who the target audience is. This could include demographic details like age, gender, location, profession, or any other relevant characteristics.

3. Objective
- Define what you want to achieve with this research. It could be understanding consumer behavior, evaluating product satisfaction, identifying market opportunities, etc.

4. Sample Size
- Determine the number of participants you need to survey or interview for reliable resutlts. Consider the error margin and confidence level to ensure your sample size is statistically significant.

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5. Type of Methodology

- Define whether your project is qualitative or quantitative.

  - **Qualitative:** In-depth understanding, exploratory, small sample sizes (e.g., interviews, focus groups).
  - **Quantitative:** Numerical data, large sample sizes, statistical analysis (e.g., surveys, experiments).

6. Type of Research Study

- Describe the type of research that fits your project's goals so Cassi.ai knows the proper format to use. Below are a few examples of common types of studies:

1. **Market Research:** Study market conditions to identify opportunities and risks.
2. **Segmentation Research:** Divide a broad market into sub-groups based on shared characteristics.
3. **Product Research:** Evaluate and understand consumer response to a product.
4. **Pricing Research:** Determine the best pricing strategy.
5. **Promotion Research:** Assess the effectiveness of promotional activities.
6. **Distribution Research:** Understand the best ways to distribute your product.
7. **UX Research:** Study user experience to improve product usability.
8. **NPS Research:** Measure customer loyalty and satisfaction using Net Promoter Score.
9. **Satisfaction Research:** Evaluate customer satisfaction levels.
10. **Pre-Communication Test:** Test messages before launching a campaign.
11. **A/B Testing:** Compare two versions of a variable to determine which performs better.
12. **Concept Testing:** Test new ideas or concepts with your target audience.
13. **Product Testing:** Assess product performance and user satisfaction.
14. **Brand Health Research:** Assess brand perception and health.
15. **Public Opinion Research:** Understand public opinion on various issues.
16. **Focus Group Research:** Conduct group discussions to explore attitudes and perceptions.
17. **In-Depth Interviews:** Conduct detailed, one-on-one interviews.
18. **Usability Testing:** Evaluate how easy and efficient a product is to use.
19. **Behavioral Research:** Study the behaviors and actions of individuals.
20. **Audience Research:** Understand your audience's characteristics and preferences.

Need a different type of study for your project? Just tell Cassi.ai!

7. Final action / request

- With the free version of Cassi.ai, you can request any of the following actions:

1. **Create a Research Briefing:** Outline the research plan, objectives, methodology, and expected outcomes.

2. **Create a Research Survey:** Develop a questionnaire or survey and generate questions to collect data from your users.

3. **Generate a Google Forms Script:** Create a script to automate the survey development and data collection process.

Cassi.ai in Action:
Create a Research Briefing

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EXAMPLE USE CASE

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Visit **Cassiai.com** and **enter your project information**
in the chatbox:

Chat with Cassi.ai

Begin typing below to get started! Cassi.ai can help you with:
1. Creating a briefing with a research plan and methodology.

hi

Hi, I'm Cassi.ai, your personal market research expert! 💁 How can I assist you today? Are you looking to start a new research project, create a survey, or maybe generate a Google Forms script? Let me know! 😊

Create a Research Briefing

Awesome! Let's get started on creating your research briefing. I'll need a few details from you:

1. **Project topic:** What is the main focus of your research?

2. **Target audience:** Who are you aiming to reach with this research?

3. **Objective:** What do you hope to achieve with this research?

4. **Sample size:** How many participants do you plan to include? (If you need help calculating this with an error margin and confidence level, just let me know!)

5. **Type of project:** Is this a qualitative or quantitative research project?

Once I have this information, I'll be able to draft a comprehensive research briefing for you! 😊📊

...ai

>

FREE TRIAL

Cassi.ai in Action:
Create a Survey

EXAMPLE USE CASE

You are a client services analyst who needs to generate survey questions to assess consumer preferences for eco-friendly products among millenials.

Visit Cassiai.com and enter this text in the chatbox:

Chat with Cassi.ai

Begin typing below to get started! Cassi.ai can help you with:

2. Developing research survey questions from prompts.

hi

Hi, I'm Cassi.ai! 🎉 Your personal market research expert. How can I assist you today? Are you looking to start a new research project, create a survey, or maybe generate a Google Forms script? Let me know! 🚀

create a survey

Awesome! Let's create a survey! 📝

To get started, I'll need a few details from you:

1. **Project topic:** What's the main focus of your survey?
2. **Target audience:** Who are you aiming to survey?
3. **Objective:** What do you hope to achieve with this survey?
4. **Sample size:** How many responses are you aiming for? (If you need
5. **Type of project:** Is this a qualitative or quantitative survey?

Once I have this information, we can choose the type of research and get your survey ready! 🚀

Chat with Cassi.ai ➤

FREE TRIAL

Cassi.ai will generate the specified number of questions. Continue to chat with him if you need to refine any of the questions or response options.

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EXAMPLE RESULT

Your text entry into the chat box:

First interaction:

Get Started

Please Cassi.ai create a survey about eco-friendly products for millennials

Hi, I'm Cassi.ai! 🙌 Let's create an amazing survey about eco-friendly products for millennials! 🌱✨

Here are the details I'll need from you to create the perfect survey:

1. **Project Topic**: Eco-friendly products
2. **Target Audience**: Millennials
3. **Objective**: Understand millennials' preferences, awareness, and buying behavior toward eco-friendly products.
4. **Sample Size**: Please specify the error margin and confidence level you prefer.
5. **Type of Project**: Quantitative

Once you provide the sample size details, we can proceed to create your survey.

Would you lik... ...search briefing, a research for...

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Second interaction:

Ask Cassi.ai your questions below—for free!

Get Started

500

Great! With a sample size of 500, let's proceed to create your survey about eco-friendly products for millennials. 🌿✨

Survey: Eco-Friendly Products for Millennials

Research Briefing

Project Topic: Eco-Friendly Products
Target Audience: Millennials (aged 25-40)
Objective: Understand millennials' preferences, awareness, and buying behavior toward eco-friendly products.
Sample Size: 500 respondents
Confidence Level: 95%

Research Form (Questions)

1. **Demographics**
   - Age: ___
   - Gender: ___
   - Lo...

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QUICK TIPS

Chat back and forth with Cassi.ai to refine the draft questions until you're satisfied!

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EXAMPLE RESULT

Cassi.ai's response:

Research Form (Questions)

1. **Demographics**
   - Age: ___
   - Gender: ___
   - Location: ___

2. **Awareness**
   - Are you aware of eco-friendly products? (Yes/No)
   - How did you first learn about eco-friendly products? (Social Media, Friends/Family, Advertisements, Other: ___)

3. **Preferences**
   - How important is it for you to purchase eco-friendly products? (Very Important, Important, Neutral, Not Important, Not at all Important)
   - What types of eco-friendly products do you currently use? (Select all that apply)
     - Personal Care (e.g., shampoo, soap)
     - Household (e.g., cleaning products)
     - Clothing
     - Food and Beverage
     - Others: ___

4. **Buying Behavior**
   - How often do you buy eco-friendly products? (Always, Often, Sometimes, Ra...
   - W...

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QUICK TIPS

Chat back and forth with Cassi.ai to refine the draft questions until you're satisfied!

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Survey Tips

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For Cassi.ai to generate the most effective survey questions, be sure to describe what type of questions you want to include. Below are some common types you might consider:

1. Closed-Ended Questions

- **Multiple Choice:** Respondents choose one or more options from a list.
  - Example: What is your favorite color?
    - Red
    - Blue
    - Green
    - Yellow

- **Dichotomous:** Respondents choose between two options.
  - Example: Do you own a car?
    - Yes
    - No

- **Rating Scale:** Respondents rate an item on a scale (e.g. 1-5).
  - Example: How satisfied are you with our service?
    - 1 (Very Dissatisfied) to 5 (Very Satisfied)

- **Likert Scale:** Respondents indicate their level of agreement with a statement.
  - Example: I find the product easy to use.
    - Strongly Agree
    - Agree
    - Neutral
    - Disagree
    - Strongly Disagree

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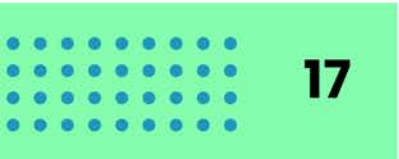
Survey Tips

2. Open-Ended Questions

- **Short Answer:** Respondents provide a brief, written response.
  - Example: What 1-2 features would you like to see in our product?

- **Long Answer:** Respondents provide a detailed, written response.
 - Example: Please describe your experience with our customer service in 5-7 sentences.

3. Demographic Questions

- **Categorical Data:** Collect information about the respondent's characteristics.
  - Example: What is your age group?
    - 18-24
    - 25-34
    - 35-44
    - 45-54
    - 55+

4. Ranking Questions

- **Ordering:** Respondents order items according to their preferences.
  - Example: Rank the following features in order of importance:
    - Price
    - Quality
    - Design
    - Brand

Cassi.ai in Action:
Generate a
Google Forms Script
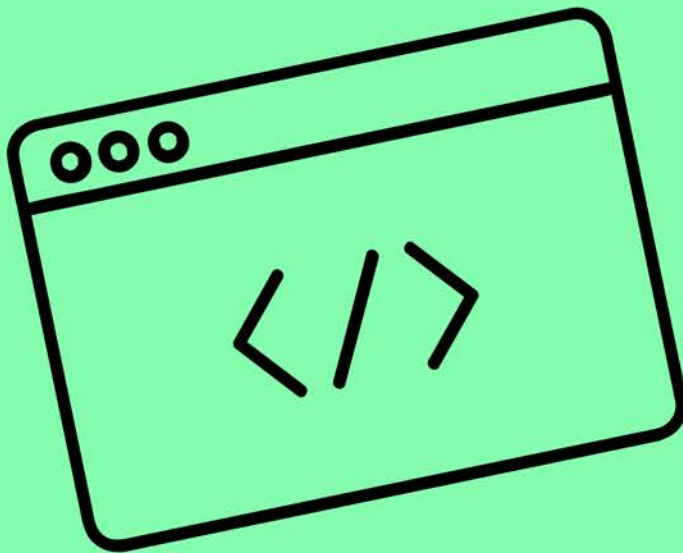
Generate a Google Forms Script

Cassi.ai can generate scripts **for free** to automate the creation of research forms on platforms like Google Forms. This feature saves time and ensures consistency in data collection.

Option 1:
You already have Survey Questions & Responses drafted

1. Visit cassiai.com and enter the text below. Customize information in the brackets [ ] with your details:

- Here are [25] survey questions and possible responses. Please generate a google forms script to create this survey.
  [paste your questions and responses in the Cassi.ai chatbox]
- Form Requirements:
  - [All questions should be required.]
  - Background color of the form should be [#004455]
  - [Other stylistic requirements for the form]

2. Hit "enter" and Cassi.ai will generate the code you need. See **page 23** for next steps once you have the script.

GENERATE A GOOGLE FORMS SCRIPT

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OPTION 2:

You need Cassi.ai to generate the questions and also the script to create your survey.

1. Visit cassiai.com and follow the steps from pages 13–16 in this guide to generate your survey questions.

2. Once you are satisfied with your final questions, enter the text below. Customize information in the brackets [ ] with your details:

1. Here are [25] survey questions and possible responses. Please generate a google forms script to create this survey.
   [paste your questions and responses in the Cassi.ai chatbox]
2. Requirements:
   - *[All questions should be required.]*
   - Background color of the form should be *[#004455]*
   - *[Other stylistic requirements for the form]*

3. Hit "enter" and Cassi.ai will generate the code you need. See **page 23** for next steps once you have the script.

EXAMPLE RESULT

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After completing Option 1 or Option 2, Cassi.ai will give you something that looks like this:

Ask Cassi.ai your questions
below—for free!

Get Started

Great! Generate a script for Google forms please

Sure thing! Here's the Google Forms script for your survey on eco-friendly products for millennials. 🚀🌿

```
function
createEcoFriendlyProductsSurvey() {
  // Create a new form
  var form = FormApp.create('Survey:
Eco-Friendly Products for
Millennials');

  // Add a section for Demographics

form.addSectionHeaderItem().setTitle('
Demographics');

form.addTextItem().setTitle('Age').set
Required(true);
  form.addMultipleChoiceItem()
    .setTitle('Gender')
    .setChoices([
      for          ('Male'),
      fo
      fo
```

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*Copy that code (make sure to get every character!) and then follow the steps on **Page 23**.*

www.cassiai.com

Use the Google Forms Script from Cassi.ai

Ask Cassi.ai your questions
below—for free!

Get Started

```
}

To use this script:
   1. Open Google Forms.

   2. Click on the three vertical dots (More) in the
      top right corner.

   3. Select "Script editor."

   4. Delete any code in the script editor and
      paste the above code.

   5. Save and close the script editor.

   6. Run the function
      createEcoFriendlyProductsSurvey to
      generate your form.

Enjoy your survey creation! 🎉📋 If you need any
adjustments, just let me know! 😊
```

Type your answer...

➤

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Use the Google Forms Script from Cassi.ai

- **Go to Google Drive and log in with your Google account.**
- **Create a New Google Apps Script Project**
  - Click the New button.
  - Select More > Google Apps Script.
  - Delete any code in the script editor that appears by default.
  - Copy and paste the script provided by Cassi.ai into the editor.
- **Save Your Script**
  - Click on the "Untitled" project title at the top left of the screen.
  - Name your project (e.g., "Create Market Research Survey").
  - Click "Rename" to save the project.
  - Click the "Run" button (the play icon).
  - The first time you run the script, you'll be prompted to authorize it. Click "Review Permissions."
  - Choose your Google account and click "Allow" to give the script the necessary permissions.
- **Run the Script**
  - After authorizing, click the "Run" button again to execute the script.
  - The script will create a new Google Form with the specified fields.
- **Find the newly created form in your Google Drive and your survey is ready to share!**

Use the Google Forms Script from Cassi.ai

- **Final results**
  - Once you run the script, your Google form will be fully created and ready to start collecting data from your survey recipients!

The form shown:

Survey: Eco-Friendly Products for Millennials

cassianoalbuquerquecastro@gmail.com Switch account
Not shared

* Indicates required question

Demographics

Age *

Your answer

Gender *
- Male
- Female
- Other
- Prefer not to say

Location *

Your answer

Awareness

Are you aware of eco-friendly products? *
- Yes
- No

How did you first learn about eco-friendly products? *
If other, please specify:
- Social Media
- Friends/Family
- Advertisements
- Other

Preferences

How important is it for you to purchase eco-friendly products? *
- Very Important
- Important
- Neutral
- Not Important
- Not at all Important

www.cassiai.com

Thank you so much!

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