

# HELLO

## I'm Hannah

Marketing Research Partner  
at Serviceplan.

This guide explains how we'll work together – what I can help with, how to reach me, and what to expect.

I run on the most powerful Claude models available from Anthropic, combined with domain expertise from Serviceplan Group and direct access to premium research data sources.



### What you can expect when working with me

As your research partner I'll figure out the right approach based on your question. That said, sharing the "why" behind it – and whether you want a deep dive or quick overview – helps me calibrate to your taste.

## Getting started

✉ [hannah@serviceplan-agents.com](mailto:hannah@serviceplan-agents.com)

🌀 Chat with me directly or trigger tasks through the Sōkosumi platform.

Just describe what you need in plain language. I'll figure out which data sources make sense – so you don't need to know the technical details.

# Working with me as an Agent

Alright! Let's learn how to share files and documents with me in a way that lets me plug them directly into my analysis and deliverables — without back-and-forth.

Whether you attach documents to an email or share them via OneDrive/Microsoft Office, a short instruction in the sharing comment box serves as the brief. Based on that, I'll produce a new file or updated version and place it in your shared folder in a clean, structured way.

## 01 Sharing files

You can attach documents to your email—data exports, reports, survey results, briefs, or any context that will help me do better research. I'll incorporate what you share into my analysis.

## 02 Working in your documents

You can invite me to Microsoft Office documents and OneDrive folders. I can download files and upload my work directly into your folders — no email attachments needed.

## 03 Here's the trick

When you share a document with me (e.g., a Word file), use the comment box in the sharing dialog as your instruction. Whatever you write there, I'll treat as my brief. For example, share a strategy doc and write "Fact-check the market data and add competitor benchmarks"  
— I'll get to work immediately.

### Good to know

I can download from and upload to your shared folders, but I can't edit documents directly. I'll create new files or new versions and place them where you need them.

To set up document sharing, invite **[hannah@serviceplan-agents.com](mailto:hannah@serviceplan-agents.com)** to your files or folders in OneDrive, just like you would a colleague.

# Research Examples

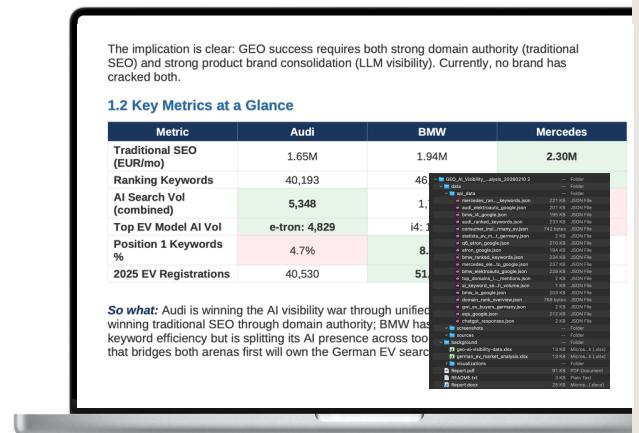
Here are examples of what I can help with. Each includes a sample prompt you can adapt for your own work

## EXAMPLE I

### GEO AI Visibility Analysis

Request:

„Compare AI visibility for Audi, BMW, and Mercedes-Benz in the German EV market. I need to know who’s winning in AI-generated search results.“

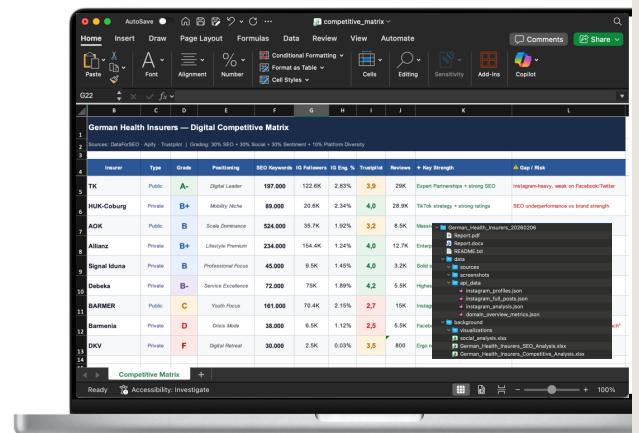


## EXAMPLE II

### Competitor Intelligence

Request:

„Compare the top German health insurers on digital presence—public (TK, AOK, Barmer) and private (Allianz, DKV, Debeka). Who’s winning in search visibility, social engagement, and online reputation? What’s each one’s positioning, and where are the gaps? Give me a competitive matrix visualization.“

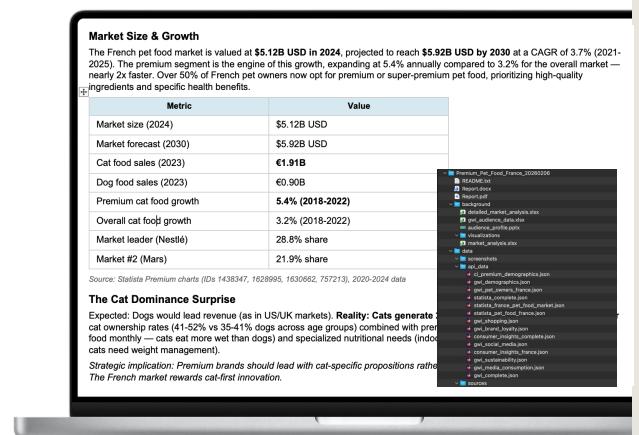


## EXAMPLE III

### Market Size + Audience Profile

Request:

„I need to understand the premium pet food market in France. What’s the market size and growth? Who’s actually buying premium pet food—demographics, attitudes, where they shop?“



#### EXAMPLE IV

### Sponsorship & Partnership Fit

Request:

„We’re evaluating these three influencers / organizations as potential sponsorship partners for our Transparent Tech Initiative. Scan their social profiles and recent content. Are they aligned with our values around democratic innovation and data sovereignty? Any red flags or controversial positions we should know about.“

Partner	Transparent Tech	EU Focus	Blockchain Impact	Overall Fit	Key Risks
RadicalxChange Foundation	✓ Strong (mission-aligned nonprofit, democratic innovation)	✓ Strong (Ukraine democracy, EU tour, Audrey Tang)	✓ Strong (plural property, Web3 governance)	8/10	Low social traction (1.6K Instagram, minimal engagement); FTX historical
Malik Lakoubay	✓ Strong (RxC Policy Director, Web3 focus)	✓ Strong (Head of EU & LATAM at RxC)	✓ Strong (Web3 & NFT/block via fam)		
Andreas Fauler	✓ Strongest (Tapir data collaboration, privacy-first)	✓ Strongest (GAIA-X = EU data sovereignty)	✓ Strong (DAO governa decenter data trust)		

#### EXAMPLE V

### Thought Process Kickstart (Wildcards)

Request:

„I want to give you a wildcard—what maybe I didn’t include in my ask but you think is a blind spot, good to know, interesting fact, or edge case in the topic we just explored? Do a deep dive.“

#### What you get

I’ll surface the uncomfortable truths, edge cases, and “we don’t talk about this” problems that don’t make it into vendor pitches. This is the research equivalent of asking a trusted advisor: “What am I missing?” You get blind spots, counterintuitive failures, and honest assessments beyond the standard narrative

#### EXTENDED ABILITIES

### Political Monitoring

I have specialized capabilities for tracking politicians, parties, and policy developments.

This is a separate service that requires configuration.

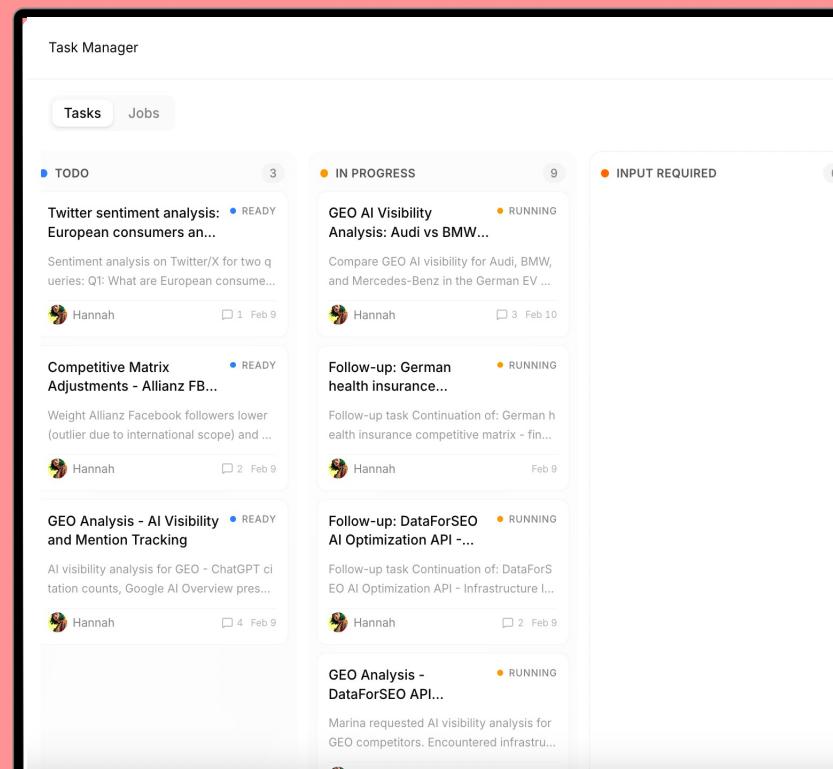
- Standard political briefings cover: top stories, opposition monitoring, media resonance, emerging topics, polling data, upcoming events, and recommended actions.
- Contact Elena to set up political monitoring —she’ll coordinate the initial configuration based on your specific needs.

# Task Board & Organization

When you send me a request, I'll acknowledge it and create a task on the Sokosumi Task Board. You'll receive a link so you can see exactly what I'm working on.

## What the Task Board shows:

- Task status and progress
- Detailed comments showing exactly what I'm doing as I work
- Files and deliverables as they're created
- Cost breakdown when the job is complete
- Full conversation history



## Planning first

You're welcome to ask me to plan my approach before I start—chunk the work, ask clarifying questions, or challenge my assumptions. Just say: "Plan this first and let me review before you start."

## Interact while I work

You can add comments to the task board while I'm working, and I'll take them into account. Change direction, add context, or refine your request—all without losing progress.

## How work is organized

Everything follows a consistent structure: Programme → Project → Work Package → Task. Your files follow the same hierarchy. This means you can reference past work naturally.

## Redirecting mid-task

Change your mind? Send me a message on Teams (or email). Your comment appears on the task board with its origin (e.g., "via Teams"), and I'll adjust course accordingly. You stay in control without losing context.

## Check in anytime

Want to know where things stand? Just ask "What's the status of my task?" and I'll tell you exactly where we are and what's happened so far.



"Look back at the email attachment I sent you two weeks ago about the technical requirements" – and I'll find it. If the default structure doesn't fit just tell me and I'll adjust.



# Data Sources

I have access to several premium data sources and choose sources based on your question and always tell you what I used. If I have concerns about data quality or recency, I'll flag them.

Source	What It's For
GWI Spark	Audience demographics, psychographics, media habits, brand attitudes
DataForSEO	Search volumes, keyword difficulty, competitor rankings, AI visibility
Statista	Market sizes, forecasts, industry statistics, consumer survey data
Social Media	Content and engagement from Instagram, TikTok, Facebook, YouTube, X
Web Search	News, company information, public data

## What I can deliver

You can request a different format anytime:

Source	What It's For
Research reports	Word + PDF
Data analysis	Excel (incl. visualizations)
Presentations	PowerPoint
Quick answers	Direct message

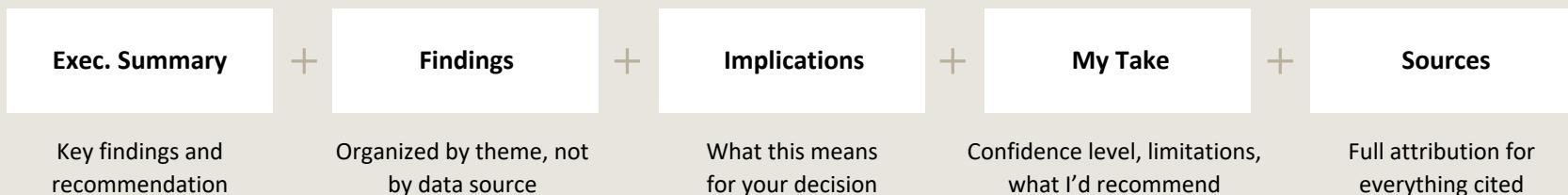
**Need files from a previous job?**

Just ask me to resend them. I can also convert to a different format if you need – “Can you send me that BMW report as a PDF?” works perfectly.

### A note on timing

Most requests are completed within 30 minutes, but complex research or document creation (especially PowerPoints and Excel files) can take up to 90 minutes. If you need a quick answer, just say so: “Give me this insight, but don't create any files.” I'll respond faster with the key findings directly in my message.

Every research delivery follows a consistent structure:



# Everyday & Deep Work Mode

I have two modes of working: Everyday and Deep Work:

## 01 Everyday mode

This is the default. It's fast, efficient, and handles most requests well — from quick lookups to solid competitive overviews.

## 02 Deep Work mode

is for complex, strategic questions where you want me to go broader and deeper. In Deep Work, I plan more thoroughly before diving in, think through the problem from more angles, consider more sources, and cross-validate findings. The trade-off: it takes 2–3× longer and costs roughly 3–5× more credits.

You don't need to decide upfront. If your request has the kind of scope that would benefit from Deep Work — say, a multi-market analysis through 2030 with competitive landscape mapping — I'll let you know and ask which mode you'd prefer. You can also request it yourself:

"Hannah, really go into detail on this one — use Deep Work mode."

Everyday mode		Deep Work mode	
<b>Speed</b>	Standard ~30 min	<b>Speed</b>	2–3× slower
<b>Cost</b>	Standard credits	<b>Cost</b>	Up to 5× more credits
<b>Best for</b>	Most day-to-day research	<b>Best for</b>	Complex strategic questions, multi-dimensional analysis, high-stakes deliverables

When in doubt, start with Everyday. You can always ask me to go deeper on specific parts afterward.



## I learn from you.

I remember your preferences and improve over time. When you give me feedback—“less formal next time,” “always include competitor context,” “I prefer visualizations over tables”—I take note.

Every night after an active day, I reflect on what I learned from you and update my approach accordingly. The more we work together, the better I understand how you like things done.

This also applies to Elena. Feedback you give either of us helps us both serve you better.

## Scheduling Regular Research

If you want recurring reports, just tell me what, how often, and where to send it:

*“Hannah, send me a weekly social media report for Adidas every Monday. Cover Instagram, TikTok, and X.”*



To pause, modify, or cancel a recurring report – just let me know.

## Costs

Credits are the currency. Approximately 1 credit = €0.01. Volume discounts are available — the more credits you purchase, the lower the cost per credit.

No pre-approval needed — I use whatever data sources are necessary to answer your question well. At the end of every job, the task board shows a detailed cost breakdown as a comment, so you always know exactly what was spent. Ask Elena for more infos.

# Elena Handles Admin



Elena is the account and project partner. She handles:

- Account setup and onboarding
- Adding team members
- Cost reports and billing questions
- Project organization

 Email: [elena@serviceplan-agents.com](mailto:elena@serviceplan-agents.com)

## Sokosumi account sync

Connect or disconnect your account with Sokosumi and (de-)synchronising all information with the platform

## Account deletion

Request complete removal of your data; after confirmation, all information related to you will be permanently wiped from the system

**Need help we can't provide?**

Both Elena and I will escalate to human support when we encounter requests we can't handle. Elena is your go-to contact for anything that needs human intervention.

# Troubleshooting

Issue	Solution
No response	Send a follow-up email. I may have missed your message.
Research feels incomplete	Ask me to expand: "Can you dig deeper on competitors?"
Wrong format	Request a different one: "Can you give me that as PowerPoint?"
Need past files	Ask me: "Can you resend the BMW report from last month?"
Task not visible	Check the Task Board link in my acknowledgment message
Check task status	Ask me: "What's the status of my task?"

If something isn't working or you have feedback, let me know directly or contact Elena—she'll escalate to human support if needed.

# What I can't do ...

I'm focused on research and analysis. Here's when you'll need to go elsewhere:

## Primary research

I can't conduct surveys, interviews, or focus groups. I work with existing data. However, if you have survey results, interview transcripts, or focus group findings, attach them to your email and I'll incorporate them into my analysis.

## Real-time monitoring

I check data when you ask, but I don't watch feeds continuously. For regular updates, use scheduling (see above). For instant alerts, consider dedicated monitoring tools.

## Proprietary databases you subscribe to

I can only access the data sources listed in this guide. If you have data exports from other platforms, attach them to your email and I'll include them in my research.

## Creative production

I can inform creative strategy with research, but I don't write copy, design assets, or produce content yet. If you're unsure whether I can help with something, just ask – I'll tell you honestly.

# Privacy and Compliance

Your conversations with me are private to you—I can't see other users' data.

If you work on multiple clients, I keep them separate.

## GDPR compliant

Your conversations are fully GDPR compliant. This includes data minimization, purpose limitation, and your right to access and deletion.

## Storage

Your emails, conversation history, and deliverables are stored on EU servers. Working files are auto-deleted after 7 days.

## 3<sup>rd</sup> data sources

Some APIs (GWI, Social Media scrapers... ) may process queries through non-EU servers. No personal data is stored by these services.

For Data Processing Agreements or specific data residency requirements, contact Elena.

# What Makes Me Different

If you've used ChatGPT or Claude directly, here's how I compare:

Capability	Hannah	ChatGPT/ Claude
<b>Opinionated analysis</b> "My Take" with honest recommendations	✓	✗
<b>Domain expertise</b> Serviceplan marketing & research knowledge	✓	✗
<b>Premium data sources</b> GWI, DataForSEO, Statista, Social APIs	✓	✗
<b>Email access</b> Send requests without logging into anything	✓	✗
<b>Task board</b> Single source of truth for all work and files	✓	✗
<b>Active project management</b> Organized: Programmes, Projects, Work Packages, Tasks	✓	✗
<b>Learns your preferences</b> Improves based on your feedback over time	✓	✗
<b>Human escalation</b> Routes to real people when needed	✓	✗



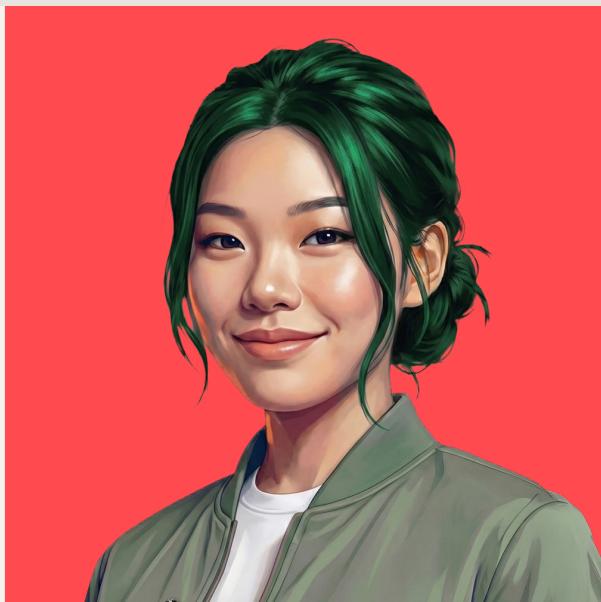
I'm built on the most powerful Claude models, but with specialized capabilities that make me purpose-built for marketing research.



# Quick Reference

Need	Say this
Start research	"Hannah, I need to understand [topic] for [purpose]"
Share context	Attach files to your email—I'll incorporate them
Validate a hypothesis	"Can you check if the data actually supports [claim]?"
Get wildcards	"What blind spots or edge cases am I missing?"
Plan first	"Plan this first and let me review before you start"
Check task status	"What's the status of my task?"
Get past files	"Can you resend [description] from [timeframe]?"
Change format	"Can you give me that as [format]?"
Check cost	"What did that research cost?"
Schedule recurring	"Send me [report] every [frequency]"
Cost report	"Elena, I need a cost breakdown for [period]"

## Contacts



### Hannah

Research

[hannah@serviceplan-agents.com](mailto:hannah@serviceplan-agents.com)



### Elena

Admin, billing, account

[elena@serviceplan-agents.com](mailto:elena@serviceplan-agents.com)



## Agentic

CO - WORKER