READY, AIM, FIRE

A GUIDE TO AGILE INSIGHTS FOR CONSUMER PRODUCT TEAMS

PART 3: FIRE ON ALL CYLINDERS

Digsite

by **QuestionPro**

ONE STEP CLOSER.

In Part 1: Ready for a New Approach, we covered the foundations of agile research. When consumer product teams are guided by Digsite's agile principles, their organizations benefit from:

- **A deeper understanding of what customers think.** It's easier to design and build the best products if you aren't guessing what your customers want and why they want it.

- **More frequent testing to inform more decisions.** Thanks to the online nature of agile research technology, companies can test more concepts for their budget.

- **Better insights in less time.** Learn directly from your customers, implement feedback and re-test updates in half the time it has traditionally taken.

More **Quality Engagement**	*More* **Experiments and Experiences**	*More* **Focus on "Why's"**	*More* **Learning and Iteration**	*More* **Flexible Collaboration**
Less Quantity of Responses	*Less* Asking Attitudes and Beliefs	*Less* Measuring the "What"	*Less* Static Testing	*Less* "Go" or "No Go" Decisions

In Part 2: Aiming for Success, we laid out a guide to get your company on-board and ready for action, sharing tips on how to get stakeholder buy-in at your organization. Market research sprints can be broken down into five steps:

1. **Form a collaborative team.**
2. **Prioritize the focus.**
3. **Design the research.**
4. **Learn and iterate.**
5. **Reflect and repeat.**

FIRING UP

Your team has bought into the idea of agile and they're ready to go. You want to be iterative and have more flexibility. **Now what?**

Rather than just talking hypothetically, this third and final segment of our *Ready, Aim, Fire* series gives you some real examples of agile insights initiatives and how they helped the organization.
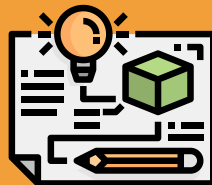
Below we have examples of 4 different agile research initiatives and some tips on getting started. Next, pick an objective and get to work!
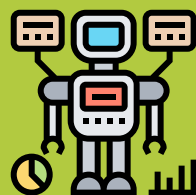
AGILE MARKETING
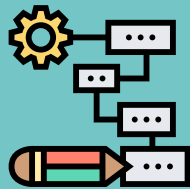
Build better brand communication by testing your targeting, messaging, advertising and web content.
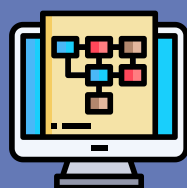
AGILE SHOPPER INSIGHTS

Get deeper shopper understanding that includes packaging, shopper experience and retailer insights.

AGILE INNOVATION

Rapid development and iteration including ideation, concept testing, product testing and field trials.

AGILE USER EXPERIENCE

Better understand consumer behavior through researching customer experience, user experience and Jobs to be Done.

AGILE MARKETING

BUILD BETTER BRAND COMMUNICATION BY TESTING YOUR
TARGETING, MESSAGING, ADVERTISING AND WEB CONTENT.

Speed up your communication initiatives.
These days, brands need to be refreshing their relationship with consumers constantly. Modern insights technology can inject the consumer's voice into branding and positioning initiatives.

Empower better team decisions by **observing the role that brands play** in people's lives. Capturing photos, quotes and video can help them empathize with consumers, build consensus and identify the gaps in how their brands deliver on consumer needs.

As you build a hypothesis, compare messaging to see which captures the attention and interest of your primary target. Drill deeper into your target's thoughts and feelings by engaging in online chat or by scheduling live video conversations. Once you have your message objectives nailed, use Sprint communities for a **quick, open-ended communication check-in** to learn what your ads are communicating. Each response can be private, so you get unbiased feedback.

Then, take it a step further with group discussions that break down the messaging and imagery to **diagnose where you can improve**. Engage to find any areas where communication might be misleading or create unintended social backlash. Iterate as needed until you nail it. One advantage of a platform like Digsite is that you can decide whether to grab a fresh audience or continue to iterate with your existing group.
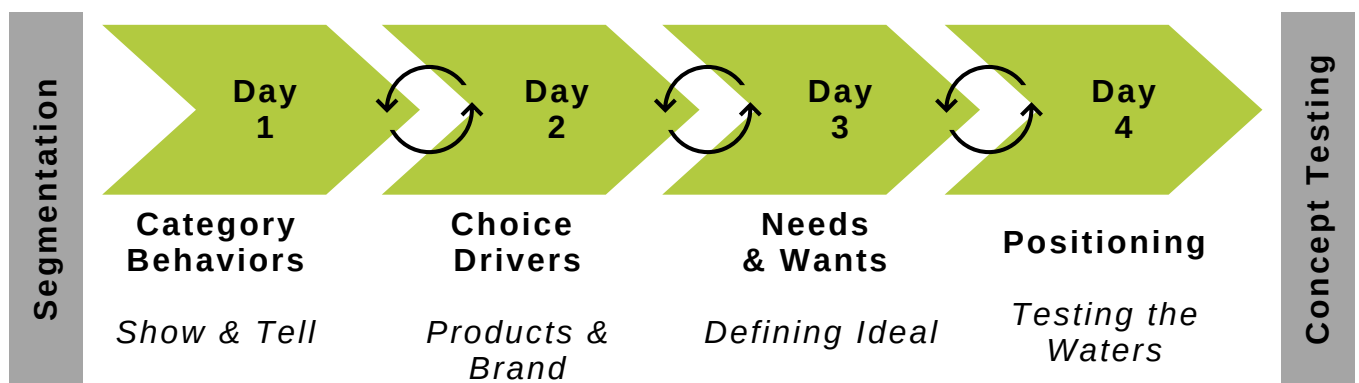
EXAMPLE:
BUILD AND REFINE
YOUR CONCEPTS.

HARRY'S

Harry's men's care brand needed to update their segmentation and identify prime prospects for continued growth. Harry's used quick quant research to identify the group of people they wanted to dive deeper with for innovation. They immediately moved into profiling/positioning work through qual efforts using a combination of conversations, self-recorded videos, concept feedback and video interviews. They collaboratively built a hypothesis and developed concepts during their qualitative phase. Their innovative approach gave them 18 weeks of research in only four weeks.

HARRY'S RESULT: SIGNIFICANTLY FASTER WITHOUT SACRIFICING QUALITY.

Segmentation

Day 1
Category Behaviors
Show & Tell

Day 2
Choice Drivers
Products & Brand

Day 3
Needs & Wants
Defining Ideal

Day 4
Positioning
Testing the Waters

Concept Testing

AGILE SHOPPER INSIGHTS

GET DEEPER SHOPPER UNDERSTANDING THAT INCLUDES PACKAGING, SHOPPER EXPERIENCE AND RETAILER INSIGHTS.

Improve in-store experiences.
Whether planning, shopping or reflecting on past purchases, you need to understand the shopping moments that matter to your customers. Moderated or unmoderated video capabilities capture how consumers interact with products, employees and technology while shopping. Uncover how your customers really behave, in-context and in-the-moment to **identify their decision-making process** and areas for improvement.

Keep a pulse on changing motivations by engaging verified participants to **provide their honest feedback**. Uncover pain points during shopping or usage, and brainstorm potential improvements by iterating as you learn. Using designed templates and discussion guides can help jump-start new research studies on the fly, so look for flexibility and customization in your platform of choice to efficiently meet your study objectives.

EXAMPLE: GAIN DEEPER SHOPPER UNDERSTANDING.

Palermo's Pizza was about to launch a new face for their "Primo" thin crust pizzas. They had the packaging design ready to go, but still needed some more consumer insights to refine the on-package communication. They presented various concepts to participants, asked follow-up questions and prioritized product claims. The ability to iterate with the same consumer base throughout the project meant that no stone was left unturned – Palermo's was confident that they had developed a packaging concept that would be extremely well-received by their customers. More details here.

PALERMO'S PACKAGING CONCEPT SPRINT

Activity 1: Occasion Snapshot
Participants engaged in a whiteboard and survey activity to provide feedback on Palermo's Primo Thin Crust Pizza. The activity was meant to gauge current feelings towards the product/brand.

Activity 2: Feature Prioritization
In a whiteboard activity, participants identified the icon that best represented their feelings when they both purchased and consumed Palermo's Pizza, then shared their reasoning in a follow-up group discussion.

Activity 3 & 4: Packaging Concept Feedback
Participants provided feedback on 30 different positioning statements. Through follow-up discussions, Palermo's was able to narrow the top-performing statements down to 13, then to 5, then to 1.

Activity 5: Packaging Concept Feedback Round 2
The final activity explored the packaging design itself. Using a whiteboard activity, participants gave feedback on both the ingredients layout and the iconic "crust-o-meter."

"Digsite is the only tool that could accomplish access to geographic areas to get national feedback in two weeks on a budget. We got what we were looking for."
- Director of Innovation and New Business Development, Palermo's Pizza

AGILE INNOVATION

RAPID DEVELOPMENT AND ITERATION INCLUDING IDEATION, CONCEPT TESTING, PRODUCT TESTING AND FIELD TRIALS.

Build better products in less time.
Innovation teams are feeling increased pressure to be consumer-centric in a way that is faster, more in-depth, and better integrates with marketing and product feedback. The key to speeding up innovation is delivering **quick but robust and comprehensive insights** among high-quality participants.

From the fuzzy front end of new ideas to early concept creation, through product development and market-ready solutions, you need an agile tool that can **help you inform every decision along the way**. It's essential to learn and validate throughout the entire innovation process.

Surveys aren't agile if you're left with more questions than answers. Capture experiences, ask questions and get open-ended feedback on new or existing products with flexible qual + quant capabilities. Look for recontact capabilities so you can **engage with participants over days or more** to test ideas and evolve questions as you learn. This iterative approach will help build buy-in to solutions as you go.

EXAMPLE:
AVOID COSTLY MISTAKES.

As Johnsonville was developing a new product line, they layered in-home video experiences and qualitative engagement to their early product testing. As a result, they determined that one of their product flavorings scored well but didn't deliver the emotional benefit they were shooting for. They were able to replace that flavor for the upcoming release to deliver a better concept-product fit, and ultimately gained strong in-market traction.

JOHNSONVILLE'S RESULT: BETTER CONTEXT FOR QUANTITATIVE RESULTS.

About Participant → **Product Video** → **Survey #1**

Positioning Exploration ← **Survey #2** ← **Product Video**

Tysa S.
about a month ago

I live with my husband and two kids ages 12 and 17. I typically work out in the morning at 6:00 am. I prepare myself breakfast usually eggs with some sort of carb like an English muffin and sometimes sausage or bacon.

My interests include working out, cycling and spending quality time with friends and family.

I currently have turkey sausage in the freezer. I sometimes buy these when I don't want to have to use up a pack of refrigerated meat quickly.

Lynne B.
about a month ago

I've been cooking the ▆▆▆ in a pan now for about three or four minutes but you acting up a little bit I am making lots of little subtle noises that I am looking very much like ▆▆▆ looks as it cooks although it's ▆▆▆ and he gives it giving off a nice odor turning a little bit brown on the edges.

The one thing I like the MOST about ▆▆▆▆ _____ *Like the Most*

because _____ The one thing I would IMPROVE about
why you like that attribute the most

Johnsonville ▆▆▆ is _____ because
improvement

_____
reason for improvement

"Johnsonville is now officially hooked on Digsite and will be using the platform lots more on similar projects in the future."
- Senior Consumer Insights Manager, Johnsonville

AGILE USER EXPERIENCE

BETTER UNDERSTAND CONSUMER BEHAVIOR THROUGH RESEARCHING
CUSTOMER EXPERIENCE, USER EXPERIENCE AND JOBS TO BE DONE.

Create more impactful experiences.
Capturing and understanding consumer or customer experiences is a critical
part of succeeding in the market. Whether you are looking to develop new
solutions or improve current products or services, your success depends on
understanding and **empathizing with consumers' actions**.

Online experience research can open up a whole new world of understanding.
With real-time information about your customers' situation and behaviors—and
more importantly, **the context that's influencing their choices**—your
organization can narrow in on new solutions faster and avoid wasting efforts
on less critical issues.

In-the-moment video capture allows you to **compare what participants say
with what they really do**. Layer on live video interviews, photo sharing, image
mark-up and online conversations for a 360-degree view of their actual and
ideal experiences. Drill deeper into emotions within a customer's routine and
brand interactions and get to their true pain points. Follow up on participant
responses using one-on-one messages to probe and iterate with your
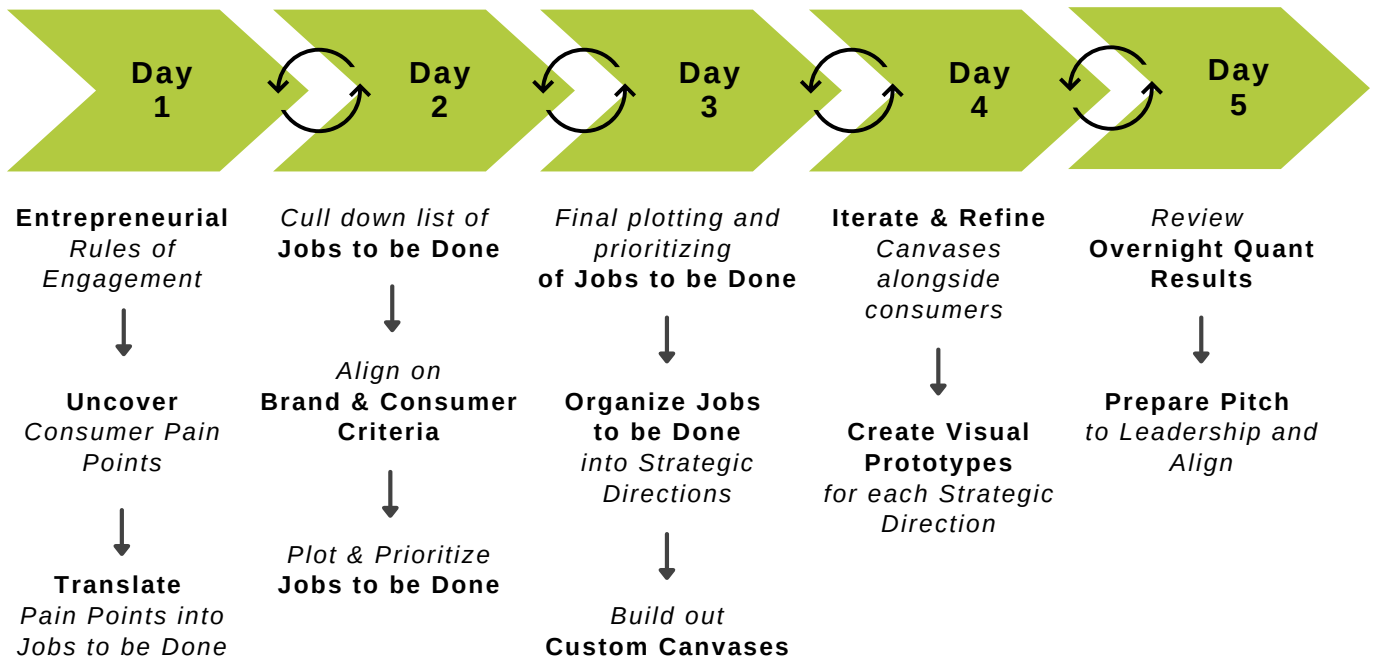customers as you learn.

EXAMPLE:
FIND THE "WHY" BEHIND
THE "WHAT."

THE
GARAGE
GROUP

The Garage Group enabled their food and beverage
client to gain context, uncover pain points and build
empathy with their consumers as part of an
accelerated process to build a 3-year new product
pipeline. The Garage Group gathered a breadth of
artifacts of participants' experiences using
photo/video, and they built customized activities to
define the consumer problem, adding on live
interviews to iterate on potential solutions. They
enabled their client team to hear directly from their
target consumer and build a pipeline of innovative
ideas in just one week. More details here.

THE GARAGE GROUP'S RESULT: FIVE-DAY INNOVATION SPRINTS

Day 1	Day 2	Day 3	Day 4	Day 5
Entrepreneurial *Rules of Engagement*	*Cull down list of* **Jobs to be Done**	*Final plotting and prioritizing* **of Jobs to be Done**	**Iterate & Refine** *Canvases alongside consumers*	*Review* **Overnight Quant Results**
Uncover *Consumer Pain Points*	*Align on* **Brand & Consumer Criteria**	**Organize Jobs to be Done** *into Strategic Directions*	**Create Visual Prototypes** *for each Strategic Direction*	**Prepare Pitch** *to Leadership and Align*
Translate *Pain Points into* **Jobs to be Done**	*Plot & Prioritize* **Jobs to be Done**	*Build out* **Custom Canvases**		

GET THINGS DONE WITH THE RIGHT AGILE TECHNOLOGY PARTNER.

With limited resources and tight budgets, an "on-demand" technology platform can sound like a great solution. **But what should you be looking for?** Below we have broken down the core capabilities of agile research technology into five categories and provided **a quick checklist of the essentials** for each.

1. QUALITY SAMPLE

The foundation of good research consists of **qualified and articulate participants**. Online qualitative often has better success than its in-person counterpart in driving engagement and honest responses. However, it is important to understand how your provider ensures quality participation.

For example, Digsite uses a proprietary SocialFind panel—an articulate, exclusive qualitative community built from active users on Facebook, LinkedIn and Instagram. We also use a **U.S. national representative panel of 1M+** *with our exclusive layer of automated, open-ended quality screening. Both samples allow you to recontact participants so you can conduct a quick 10-minute study and then follow up as needed.*

Keep in mind that the number of low-quality participants and "research farms" have expanded significantly over the past few years. Make sure your survey link prevents users from filling out multiple surveys until they qualify. Ask screening questions that make it hard to determine what key screening criteria are, as well as help you **disqualify people who select "fake" answers**. Use sample providers that go beyond digital fingerprinting to apply text analytics that **checks open-ended answers for context and quality**.

YOUR CHECKLIST:

- ☐ Avoid marketplace samples where you can't verify fraud prevention policies
- ☐ Use sample with 3rd party fraud detection and removal, including open-end quality verification
- ☐ Use advanced screening questions to prevent "fakers" from qualifying
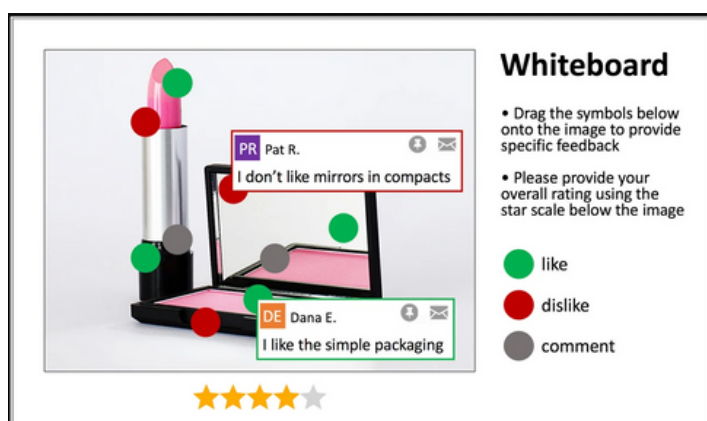- ☐ Consider sample you can recontact with follow-up questions, photos and video

2. MULTI-MODAL ENGAGEMENT

The ability to collect robust qualitative feedback in multiple formats allows teams to learn as they build solutions. Having flexibility in qualitative research means that you can change gears from day to day. This **hybrid, qual-quant approach** has been used by organizations to gather rich learning and iterate without multiple research phases.

In addition to open-ended feedback, platforms like Digsite offer structured questions, image mark-up and voting features to validate ideas as they're being built. Get more context on problems and usage behavior quickly by using **group discussion and video sharing features**. Understand the real emotional context and the "why's" through qualitative exploration to inform the next day's question. By using this approach, you arrive at solutions faster to take forward into development.

YOUR CHECKLIST:

- ☐ Surveys with the capability to rank and rate concepts with photos/video
- ☐ Group discussion and sharing of ideas/solutions
- ☐ One on one conversations with photo/video upload
- ☐ Messaging for follow-up questions
- ☐ Fill-In-The Blank Storytelling
- ☐ Image mark-up for concept or webpage feedback
- ☐ Voting for features/benefits
- ☐ Video responses for storytelling or ethnographic sharing
- ☐ Screen capture for digital experiences
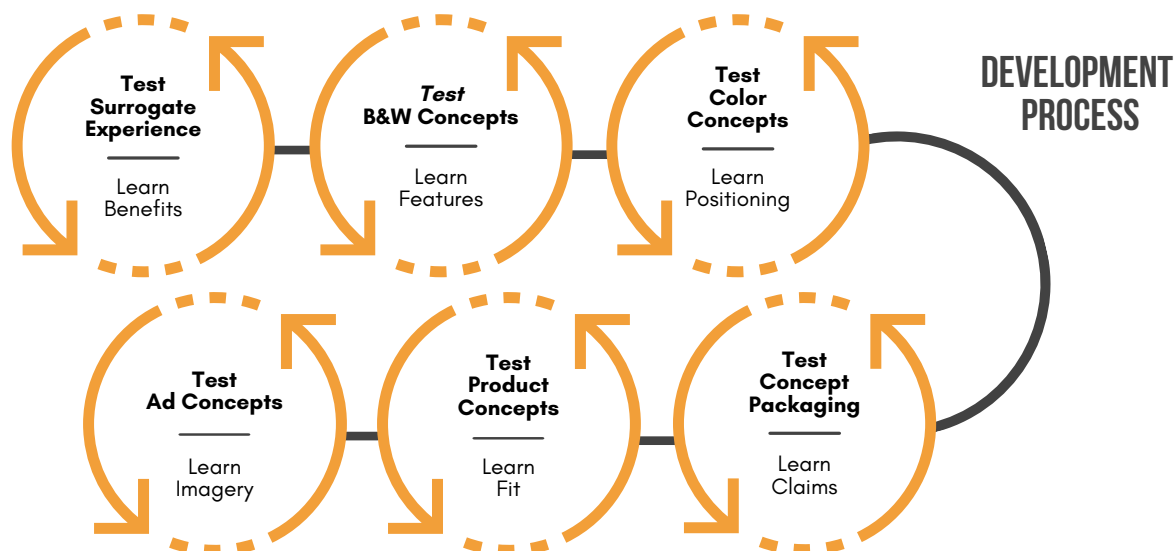- ☐ Live video interviews for in-depth exploration or follow-up

3. QUAL + QUANT FLEXIBILITY

The latest agile technology allows you to talk to **as few as five or up to hundreds of qualified consumers** to get their initial feedback. The approach is faster and more flexible than in-person approaches, plus you can dive deeper with a group discussion, live interviews, concept mark-up with comments or photo or video diary of their real experience. With leading platforms, you can also **follow-up with individual messages or clarifying questions**, so your team isn't stuck if they learn something unexpected.

Online qualitative research platforms like Digsite also offer granular analysis that can be scaled up for validation. This hybrid, qual-quant approach has been used by organizations to **gather rich learning and iterate without multiple research phases**. The combination of a robust tech platform and our research experts allows teams to stay "out of the weeds" of research logistics while seeing robust results and making faster decisions.

DEVELOPMENT PROCESS

Test Surrogate Experience
Learn Benefits

Test B&W Concepts
Learn Features

Test Color Concepts
Learn Positioning

Test Ad Concepts
Learn Imagery

Test Product Concepts
Learn Fit

Test Concept Packaging
Learn Claims

YOUR CHECKLIST:

- [ ] Scale from five responses to hundreds
  Use pre-structured templates you can customize
- [ ] Ability to probe deeper into quant responses
- [ ] Pin open-end responses
- [ ] Create segments and run automated comparisons with stat testing
- [ ] Compare and stat test 2+ concepts automatically
- [ ] Automated dashboard reporting you can download to PPT
- [ ] Ability to run iterative (days, weeks or more)

4. EXPERT SERVICES

Having a partner that can **flex between completely DIY usage to full-service offerings** means that your team has more agility when they are strapped for time. An all-in-one "on-demand" service platform can help you **use only the services you need, when you need them**. Get assistance with design, qualitative moderation, analysis and reporting to build efficiencies and get the right mix of qualitative exploration and quantitative validation.

YOUR CHECKLIST:

- ☐ Ability to launch a study same-day and rapidly recruit
- ☐ Live chat and email support for DIY set-up
- ☐ Support for studies including set-up, recruiting and study management
- ☐ Expert consulting services including design, moderation, analysis and reporting
- ☐ Best practice support including regular trainings and retrospectives on research

5. SUBSCRIPTIONS

With limited time and bandwidth, **subscriptions can offer huge reductions in time and effort (relative to full-service agencies)**. Not only do you already have pricing pre-negotiated, but you also have a team in place who knows your business and can support you on-demand. Some tech companies require large subscriptions without you ever having direct access or experience with the platform. Free trials sound great but are only relevant if your projects are 100% DIY. Look for technology partners that **maximize the flexibility in how you can access and use the platform**. Seek pilots where you can get a sense of both the product and services that the technology provider offers as well as assess the volume of usage you might need each year.

YOUR CHECKLIST:

- ☐ Ability to run pilot studies to test out the platform and approach
- ☐ Proven efficiencies for subscription vs project-based research
- ☐ Clear understanding of the team that will support you and the level of training, service and support you will receive

SHOWCASE THE BENEFITS
TO YOUR COMPANY.

Success can mean different things to different teams. Some companies find they are doing much less research than the company needs and sees the primary benefit as **more informed decisions**. Others who view their research processes being too slow see success as **faster results**. And in some cases, companies have tried other low-cost or DIY tools and are looking to deliver **more capabilities**. Ultimately, most teams are looking for better, more customized research that is still efficient and economical.

Here are a few examples of the ROI that Digsite customers have shared to prove the value of their transition to agile insights.

Reduced the overall testing cost per idea by almost 85%, in addition to cutting their concept testing time in half.	Delivered 4 months of iterative research in just 4 weeks, while still capturing rich insights through group conversations, photos and participants' shaving videos.	Conducted 10X more in–depth interviews for their budget and reduced research time by 50%.	Found critical issues through in–home tests that were not detected via lab testing, saving an estimated $2.5 million in warranty claims.

FIND A TRUE PARTNER.

While overcoming the challenges of agile research is always a work in progress, it certainly helps if you have a technology partner with **expertise in delivering agility**. Researchers familiar with agile methods can speak from experience, and leaders in the field know how to keep these common pitfalls at bay. Advanced agile research platforms don't just offer the tech you need, but they also have an **understanding of how client organizations work** and what you need to succeed when implementing research.

Whether you're a leader of a large team or a member of a small team, having an **additional layer of expert support** saves invaluable time. The combination of a robust tech platform and our research experts allows teams to feel confident about results even when they don't have time to be "in of the weeds" of research logistics. Finding a research partner **who's like-minded** and encourages agility is crucial.

LIGHT YOUR FIRE.

Qualitative research is essential to solving socially-intricate business challenges, involving changing behaviors and subtle interdependencies. We all know that conducting research takes expert care, particularly when you need to **move faster while dealing with limited team bandwidth and budget**.

We have seen firsthand that it is possible to **get more with limited timelines and budgets**. What's important is the ability to build flexibility into your process and keep learning. In order to make the best of your research, remember to **try new things and build on them to get better as you learn**. We take pride in our work and understand that it takes more than an algorithm to come up with meaningful insights and recommendations for a team.

CHECK OUT OUR SITE <u>HERE</u>. WATCH OUR <u>2-MINUTE EXPLAINER VIDEO</u> OR <u>SCHEDULE A DEMO</u>. LET'S DO GREAT THINGS TOGETHER.

Digsite
by **QuestionPro**

Digsite's collaborative platform enables agile teams to iterate between qualitative exploration and idea validation. With Digsite, you get the flexibility you need to recruit your exact target audience and engage them in unique tasks to learn and iterate as you go.

Our advanced reporting capabilities and automated dashboard make it fast and easy to report on your research. Your entire team can see new insights in real time, making it easy to adjust your research and quickly change directions so you can feel confident you're always moving in the right direction.
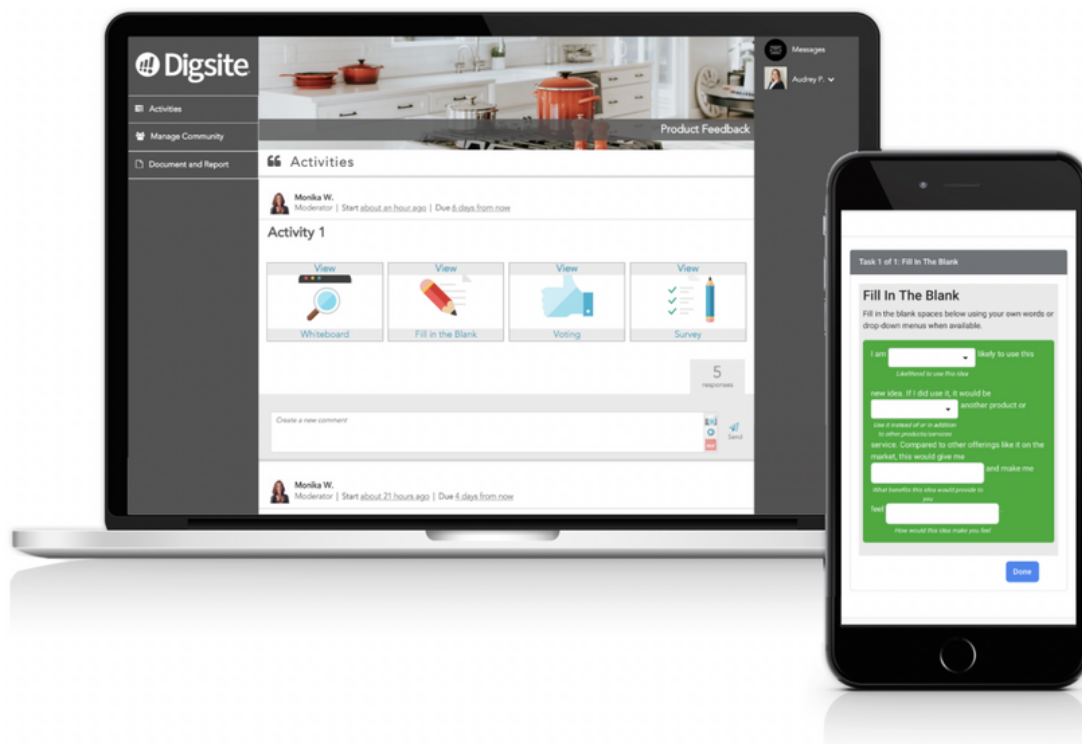
*Does this sound like something you might need? Check out our site and **schedule a demo** to learn more. We'd love to hear what you're working on and find ways that Digsite can help.*

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