10 steps to creating and running the very best Insight Community

The Complete Guide to
Insight Communities in 2021

Book 2 of 3

Contents

About this book

In this book, the first of a series of three, we'll lay out the fundamentals of insight communities for busy marketers and managers. We'll describe what they are, how they work, and what they can do for a business. And we'll take you step by step through putting together the business and strategic case for one.

This book will be especially useful for owners, managers and primary users of Insight Communities - it focuses on the nuts and bolts of running one and it assumes you already have objectives and basic parameters in mind.

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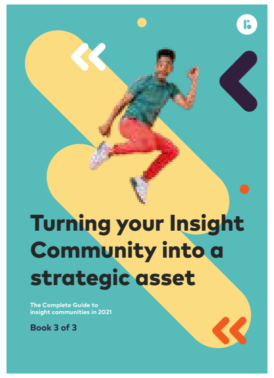
Why every brand needs an Insight Community

Book 1 of 3

- What is an Insight Community?
- Seven reasons your business needs an insight community.
- How insight communities drive growth.
- Use cases by business function and industry sector.
- Building the business case.



Turning your Insight Community into a strategic asset

Book 3 of 3

- What Insight Communities need to do to become a strategic asset.
- How to widen the scope of effectiveness through data integration.
- Why business integration is essential for achieving business goals.
- How Insight Communities will improve and evolve in the future.

A few of our insight community clients:

ASDA, GREGGS, Morrisons, deliveroo
Coca-Cola, COSTA, TESCO, TWININGS
itv, Penguin Random House, dmg::media
The Telegraph, HEARST, nickelodeon
HSBC, LV=, YBS GROUP, O2
AA, first direct

Get your ducks in a row

An Insight Community is a way of conducting ongoing research with a group of users. They allow brands to engage with their customers (current and future) in real-time – in a safe, transparent, and secure online environment.

While communities are a fantastic tool that helps brands get closer to their customers, their set-up and management is not without challenges. Here are the 10 steps you'll need to get right in order to get the insight edge from your community.

Key steps:

01. Have the right business plan

02. Choose the right platform

03. Get your organisation on board

04. Recruit the right people

05. Create a welcoming environment

06. Engage your member

07. Make sure all that data is secure

08. Create awesome outputs

09. Demonstrate ROI

10. Create amazing outputs

Let's look at every step and decipher the key point you'll need to address in order to be successful.

01

Step one:

Have the right business plan

Step one:

Have the right business plan

An Insight Community is an investment and will need a solid business case. This will help to focus minds on how your community will be used, who it will be used by and what its ultimate goals are. An Insight Community can be a vehicle that takes your brand to new places, serving new audiences and with new products but it's difficult to pinpoint your ROI on what could be.

If you're looking for a deep dive into putting together your business case, then be sure to check out the first book in this series: Why every brand needs an Insight Community.

Here are the key questions:

- What are the strategic goals of the community?
- What are the initial tactical objectives? What results do you want from the first three months?
- How large a community do you need and how long do you intend it to run for?
- Who will have access and make decisions about what the community does?
- Will it be run in-house or will a partner company manage it?
- What are your budget expectations?
- What KPIs will you use and how will you measure your Insight Community's ROI?

Step two:

Choose the right platform

Tip 1: Adaptability

The main thing that separates good from bad platforms is their **adaptability**. A good platform is one which allows you to integrate more data sources, run different modules, and which grows alongside your brand as its needs change.

In order to achieve this, you should make sure the platform you choose is continually invested in, with development resource available and a history of updates and improvements. Data formats and sources can change rapidly, and the platform needs to keep pace with that change.

Tip 2: Mobile

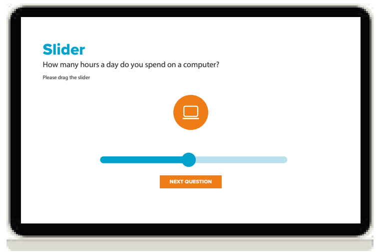
Everyone is using smart phones and its critical that your community platform will work on them. This will enable:

1. Genuine in-the-moment research that captures experiences where and when they happen.
2. Geolocation, which allows tracking and triggering of research events (e.g. shopper-relevant questions triggered by a store visit)
3. Passive metering of data - locations, activities, app use, and other areas. This gives a behavioural dimension to participant data, as opposed to just recall of activity.

Tip 3: Modularity

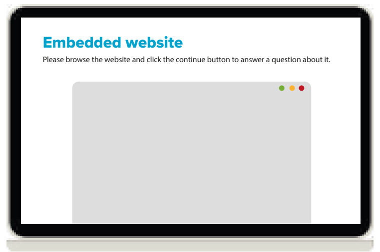
One size does not fit all. A good Insight Community platform allows for modular capabilities - it should be possible to run lots of different research tasks and analyses on the platform if required. **Some examples of common quantitative and qualitative research tools which an Insight Community might use include:**

Quantitative:



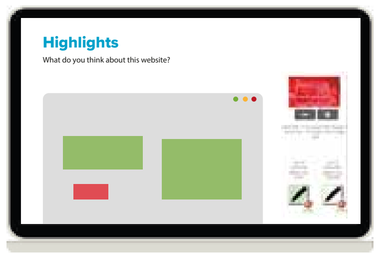
Tool: Advanced survey tools e.g. Conjoint, Max. Diff. Analysis.

Application: Pricing and product optimisation.



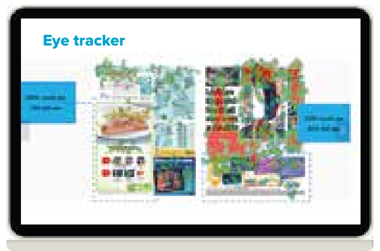
Tool: Website, apps and mobile testing.

Application: User experience research.



Tool: Highlighters, Heat Mapping, Dial Testing, Implicit Testing.

Application: NPD and comms testing.



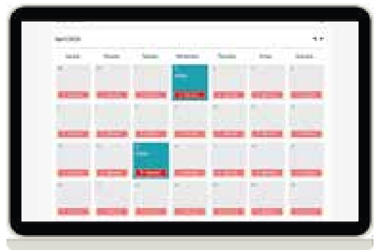
Tool: Eye tracking and facial coding.

Application: Advertising and comms testing.

Qualitative:

Tool: Online forums and groups.

Application: In-depth customer feedback (e.g. comms testing).



Tool: Diary studies.

Application: In-depth consumer understanding.

Tool: Online focus groups (real-time discussions).

Application: Multiple applications across most research areas.

Tool: Video capture and analysis.

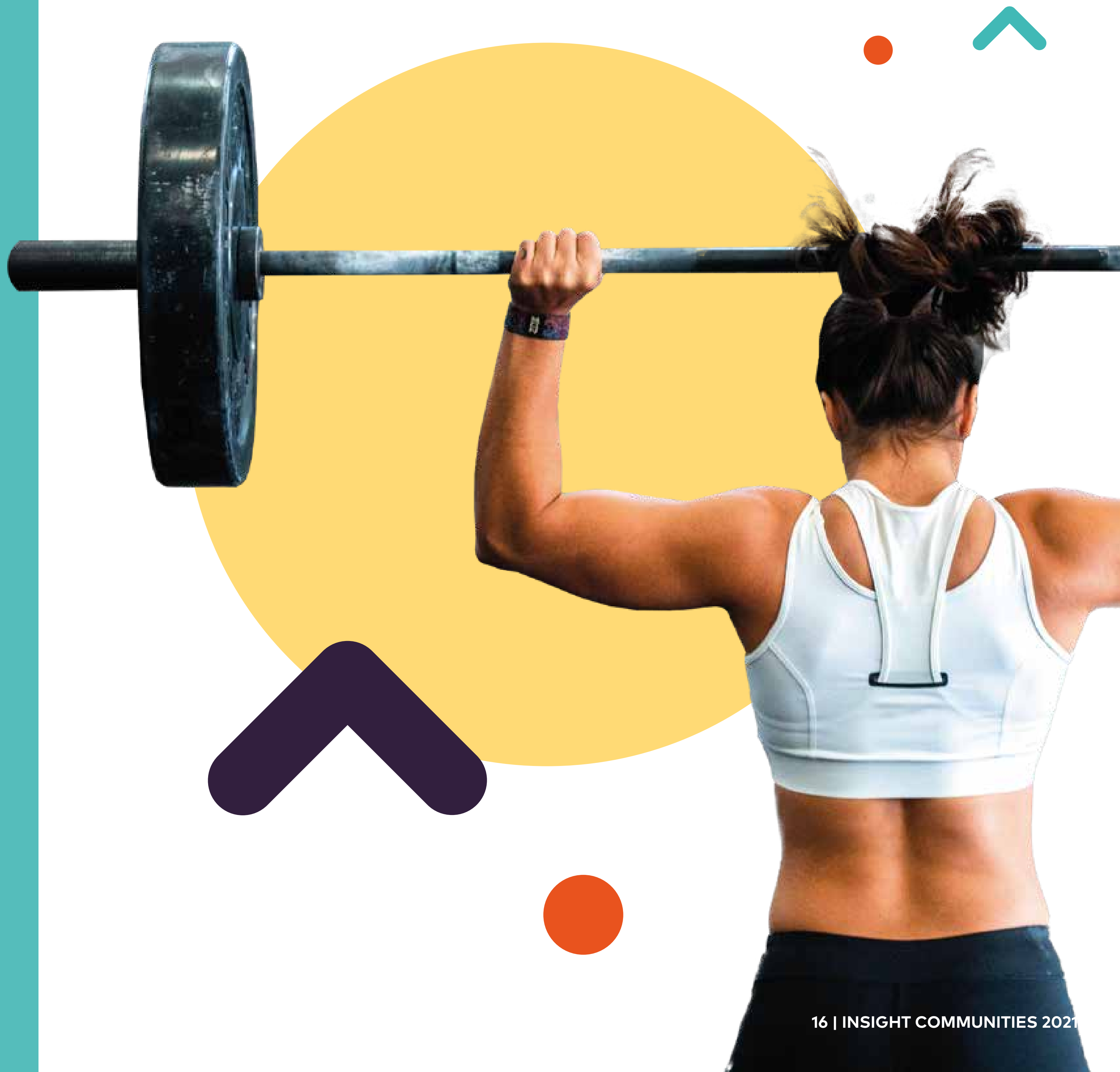
Application: Multiple applications including in-the-moment research.

These modules span the whole range of research activities. Crucially, they include tools designed to get both at automatic, unconscious **'System 1'** decisions (eg implicit testing, eye tracking and video analysis) and more considered, conscious **'System 2'** decisions (e.g. Conjoint and Max Diff tools). When researching platforms, think about which tools can help unlock answers to your burning business questions.

Tip 4: Control

Can users directly engage with members? Can they write, design and test their own surveys? Can they customise community reporting? An Insight Community platform which gives its users more control will be more useful than one which limits their autonomy. The more that users can do themselves, the more likely to be widely used within your organisation and become a powerful shared resource.

If you keep these four tips in mind when looking at different platforms, you won't go far wrong! Look beyond a simple demo and try and get hands on when testing different platforms and see how easy/difficult they are to use.



Step three:

Get your organisation on board

Get your organisation on board

To get the most out of your Insight Community you need as much buy-in as possible! Not just from senior management, but from everyone who might be working with the community's outputs. The longer the community is intended to run, the more vital wide buy-in becomes.

Buy-in is not a box you can tick. You can't just announce your Insight Community and then walk away. For a community to deliver its potential benefits to a brand, it needs to be a consistent, regular and useful presence within the business. Ongoing visibility is vital.

Tip 1: Internal processes

Nothing kills internal enthusiasm more quickly than being told about an exciting new business initiative but not being able to access and use it. Before you launch your Insight Community, you need to be absolutely clear about the internal processes around using it. For instance:

- How an internal user can commission a project using the Insight Community.
- Who signs off internal projects and the processes for costing them.
- How questions and troubleshooting requests can be raised.
- What to do in the event of a resource bottleneck and how requests will be prioritised.
- Timeframes for all the above.

Create documentation and processes in advance for when an internal stakeholder wants to use the community for research. Once this scaffolding is in place, you'll be in a position to launch to your internal audience.

Tip 2: The Launch

How should you launch the community? The answer depends on how long you intend to run the community for, and how much of the business you want to get involved. But a launch of some kind is essential. First impressions matter deeply, and a launch event lets you communicate to as wide an audience as possible and set expectations.

Of course, there's one snag with a launch event. Your Insight Community won't have produced any insights yet. So you need to be very clear about what the launch event is intended to achieve.

Awareness: At the most basic level, you need stakeholders to know that the Insight Community exists, whether or not they can attend a launch. Any invites (and internal collateral like posters or flyers) should communicate this basic information, with a one-sentence description of the community and its aim. You also need to ensure the launch is covered in any internal newsletters.

Understanding: You want anyone who attends the event to understand what the Insight Community is, how it works, why the business is investing in it, and what the aims are. The launch is an opportunity to summarise the need for the community and the problems it's going to solve for the business.

Expectations: The launch is also a chance to set expectations. What results from the Insight Community will look like, when they'll be coming, how they can be used. It's important to be realistic and not overpromise or undersell the project.

Legitimacy: Finally, one of the most important roles of the launch is to signal to the business that this is an important project worth paying attention to. The more senior speakers and attendees you can get at the launch, the better - it will help give the message that the Insight Community should not be ignored.

Tip 3: Engagement

The most critical time for internal buy-in is often the weeks and months after launch. It's in this time period that your community will either be adored or ignored. The difference comes down to three things: feedback, assistance, and communication.

Feedback loops: If stakeholders feel consulted, they will feel more committed - particularly when you are seen to act on their questions or concerns. Proactively seek out feedback on what works and what doesn't from users. Their insight will be extremely valuable in terms of identifying any "pain points" in the experience which need to be tackled.

Briefing documents are a vital tool. It's a chance to find out what your users want. They help facilitate a conversation where you can manage expectations. Each community will have its own briefing document, but they will certainly cover these areas:

- What's your challenge and what is the background to this?
- Where does this sit within your strategy?
- What business decisions will you from the research?
- What has led to this research?
- Do you have any hypotheses currently, i.e. what you think is true/untrue?
- What will it be used for, where will it be going after delivery?
- Who is the internal audience?
- Has any other similar research been commissioned recently?
- What are your preferences in terms of deliverables?

Communication is the third key part in engagement. Out of sight is out of mind. You need to regularly remind people that the Insight Community exists and is running projects to the benefit of the business. This can include:

- Including the Insight Community in all existing internal communications, HR and training programs.
- Relevant staff should be made aware of it during their induction into the business.
- Make sure that collaboration tools like Slack or Microsoft Teams have pages and channels dedicated to the community.
- Formal training in how to use the community should be available to staff who need it.
- Creating simple "Tips and Tricks" and user prompts for visitors to the community, which can remind people of easy ways to get more out of the community and suggest new ways to use it.
- Starting a regular mailout giving news about the community. These are designed to remind people the community exists, raise its profile and ultimately celebrate its success. Initially it should run links to basic resources and basic how-to guides.

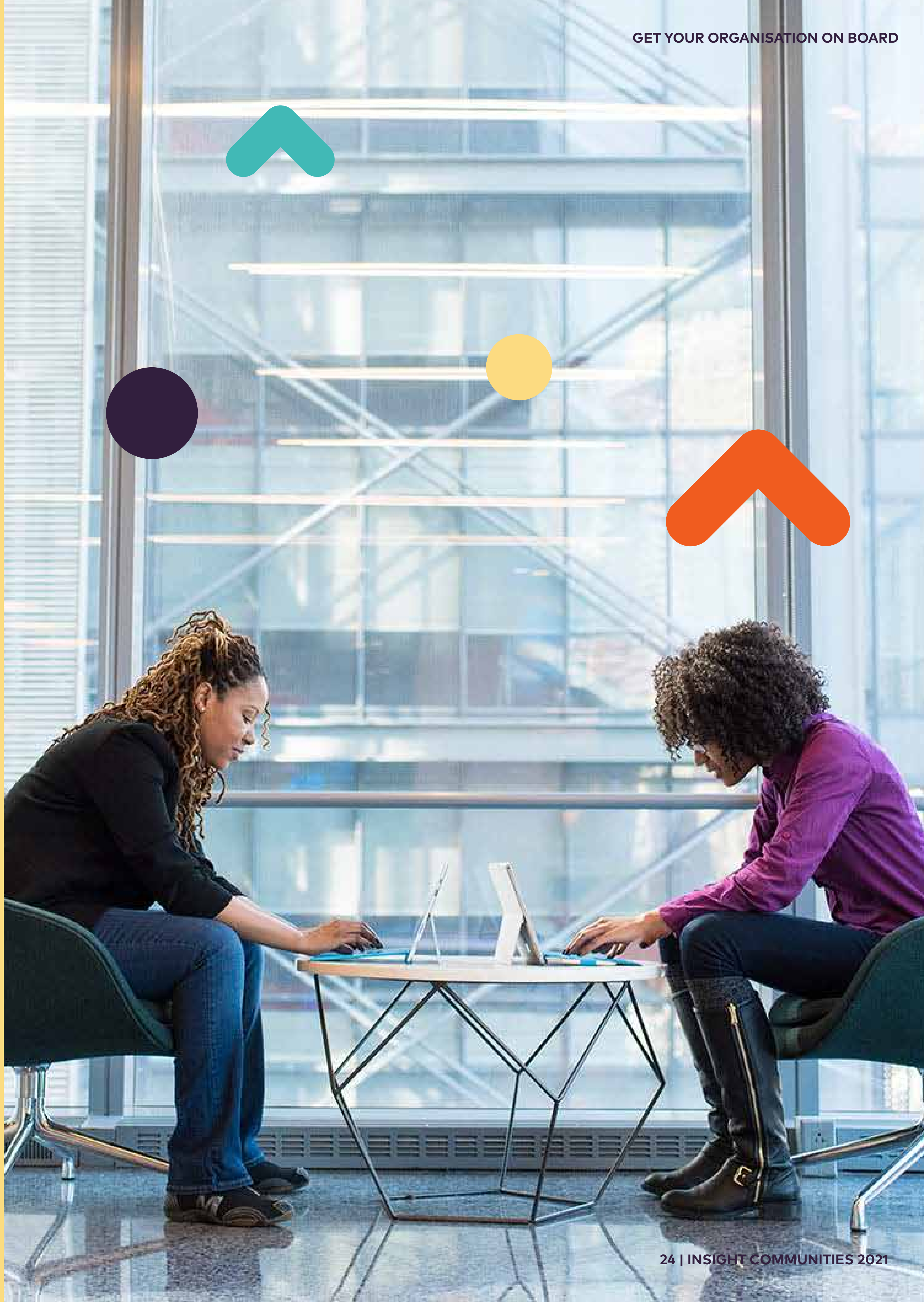
Tip 4: Celebrating success

You'll need to be proactive in taking proper credit for successful projects run using the Community. Summarise what went well on each project you run, even if you only communicate it among a select audience of direct stakeholders.

As well as being proactive in communicating success you should also be generous. It's said that 'success has many parents.'

An Insight Community is a collaborative research tool. When you get the chance to celebrate a success, be sure to give credit to people in other teams who played a part (by creating a brief, participating in the project, interpreting the output, or any other way). The aim is always to make your organisation feel the Insight Community is a shared asset, not a silo.

To be properly celebrated, though, success also has to be measured. Raising the profile and image of the Insight Community within the business is important, but you will also be expected to demonstrate its ROI.



Step four:

Recruit the right people

Recruit the right people

An Insight Community is nothing without its members. Recruiting the right people is a big job and requires a lot of co-ordination.

Tip 1: Pinpoint your targets

The first step in finding those perfect participants is defining who exactly you're looking for. You should develop member personas for each target group which will help in defining the messaging, channels and offer you'll use. You may be able to utilise existing segments for this.

Tip 2: Get your ducks in a row

Recruitment is your very first opportunity to make a good impression, set clear expectations and highlight what your members will get out of the experience. Like any good marketing campaign it's important to consider that every medium matters. You'll need tailored resources in the form of web pages/flyers/videos etc aimed at your different target groups. Underestimate the importance of these assets at your own peril!

Tip 3: Over-recruit

When it comes to your recruitment, the more the merrier. It's inevitable that people will drop out along the way to becoming community members, and this is especially true if your community is brand spanking new. Over-recruiting helps to balance out any initial churn and means as time goes on you can always opt-out those people who aren't actively engaged.

Tip 4: Using your website

Your website is a great place to start your recruitment campaign as you can attract both current and potential customers. Make sure your 'sign up' page isn't hidden away and consider adding key incentives into your customer's workflow. For example, if you are offering a discount to your community members, why not have that info/sign up button right in the checkout?

Tip 5: Using social media

Regular posts on social media about your community are a great way to keep membership ticking over. You should also look for followers who regularly like, comment or share your posts and try inviting them on a 1-to-1 basis with a personal message. Try paid advertising to reach specific demographic groups.

Tip 6: Use a 3rd party panel

Market panel research is the technique of repeatedly collecting data from a pool of pre-recruited participants. Recruiting via a panel is quicker and easier as you are already dealing with people who are used to taking part in market research. A panel is also useful in reaching out to niche audiences. Did you know that our audience module gives you access to over 110m consumers in 85 countries and can help to expedite your recruitment process.

Tip 7: Never stop recruiting

Variety is the spice of life and new members bring with them new experiences and new ideas. Your membership push should be ongoing with the ultimate goal being to develop a healthy community with regular interaction and tasks being completed. You hold the keys to your kingdom and carefully recruiting and curating members based on their activity can lead to more engagement over time.

Tip 8: Refer a friend

Friendship is the magic that transforms platforms into communities. If you already have an established community then friendship is also a great way to continue growing. Referral programmes can help generate interest from like-minded people but be careful that they don't create cliques within your community.

Step five:

Create a welcoming environment

Create a welcoming environment

First impressions matter, and the recruitment and the onboarding process for your insight community needs to fulfil two distinct goals.

First, it needs to be a welcoming, engaging and user-friendly environment for members. If sign-up is difficult, or too long, your new members are far less likely to become active and engaged.

Second, it needs to collect as much useful data as possible on members as quickly as possible. The more you know about each of the people who use your Insight Community, the easier it will be to place them correctly into customer segments and give them relevant and useful research tasks.

Onboarding

These two goals should not be in opposition. A well-designed onboarding process can generate a lot of useful data about members without alienating them.

This is the process we've put into place to meet these needs:

01. **Invite:** Members are invited by email.
02. **Enrich:** Integrate any existing data on members - whether from CRM, loyalty, or other transactional or product data.
03. **Profile:** Take new community members through a recruitment survey. This has to be brief. A maximum of 15 questions. (which is why pre-existing data from the enrich stage is so important) Profiling confirms relevant demographics but also establish the core data for the next stage.
04. **Segment:** Based on the data from stages 2 and 3, you can assign members to pre-defined customer (and potential customer) segments. You can also automatically assign new members to these segments.
05. **Sample:** You can now use the segments to sample community members for specific tasks and research projects - for instance, if you've defined a segment of non-customers who are warm to your brand, you can test potential new features or bundles on them to see which ones are most appealing.

This process is built to generate the maximum useful data on each member at first pass, while causing them the minimum hassle as they enter the Insight Community.

Data integration

Think of data as building blocks. With a few blocks you can start to build up a pretty decent understanding of your customers, but the more you have the more intricate that picture becomes. The integration of data from different channels into your Insight Community can help to build your understanding, spot trends and achieve ROI quicker.

CRM integration

The quickest way to relate Community members to your brand's definitions on customer lifecycle is by integrating your CRM data. This way you can easily conduct research to people at different stages, incorporate sales intervention for better results and ensure your community is speaking the same language as the rest of your business.

Transactional data

Understanding what your customers have been up to is useful in figuring out what they might do next. If you have transactional data such as website visits, email opens, purchase history, loyalty card data etc this is a great asset to add into your community. Close your feedback loop by cross- referencing buying activity with community members. What's their feedback on recent purchases? What drove them to you versus your competitor? How do they perceive your brand vs what do they buy? Identify the factors which predict or drive changes in customer life cycles and you can unlock more accurate customer value models.

Data exchanges

Data exchange tools act as the middle-man between your data systems and the platform the insight community runs on. The data exchange refreshes the data used by the community platform on a daily or even hourly basis, meaning it's always up to date. The integration process is two-way, so your systems can be updated with survey information, community segments and insights.

Keep the purpose in mind

One thing we often talk about when it comes to data is analysis paralysis. The point in which you have so much info you become blind. When it comes to layering up our building blocks of data it's important that you ensure that these blocks fit together.

All your data should work to a 'shared language' that builds up a full picture. When you've built up your blocks your Insight Community will make it much easier to access, interrogate and humanise that data. A community is more than just a repository for data as your team can have direct contact with customers and who can explain, in real words, what the data says. And an Insight Community humanises data by giving vivid contextual and qualitative information alongside powerful analytics.

User environment

So you've created a smooth onboarding process, and integrated your back-end data environment with existing systems - what remains in this step is to make the actual user environment feel active, welcoming and user-friendly.

How do you do this? Think about the barriers to a smooth user experience - the things which make websites or apps difficult to use; difficulty of navigation, lack of clarity, and lack of content. Good design can limit the damaging effects of all of these.

Whether on desktop or mobile, your community should have:

- ✔ **Ease of navigation:** Limit the number of different areas, and make sure the top page has direct routes to all the important ones, with easy ways to get around once members are in different part of the community.
- ✔ **Clarity of action:** A community is an interactive site - every part of it should make it obvious to a member what you expect them to do. Clear calls to action - log in, check new tasks, see latest activity, reply to posts, and others - should be in every section.
- ✔ **Primacy of recent content:** Activity breeds activity. If your community feels static, or empty, or if the first things members see when they log in are old conversations or out-of-date news, they will not be motivated to contribute as much or as deeply as you need. Make sure you're directing members to fresh and active parts of the community.

The need for fresh and motivating activity brings us nicely to the next step in creating a successful Insight Community - increasing member engagement and keeping the community healthy.

Step six:

Engage your members

Engage your members

Without regular engagement, your community will see inactivity, member churn, and ultimately won't provide the additional value you should be seeing from it. Here's some tips to ensure your community is active and engaged.

The most important role in keeping engagement levels high is the Community Manager (CM) - an individual or a team, depending on the size and scale of the Insight Community. The CM team generally has these practical responsibilities:

- Day to day member support and feedback
- Community moderation, including open forums
- Incentive management
- Member satisfaction surveys
- Cleaning of inactive members
- Community health reports

But beyond that the CM team has the broader role of keeping the Insight Community engaged. Here's some tips.

Tip 1: Set expectations

Start as you mean to carry on. Onboarding is about more than just profiling your community members, it's about making sure they know what to expect from their experience, outlining what's in for them and highlighting the value of their participation.

Tip 2: Regular and often

Activity breeds activity. If your community feels static, or empty, or if the first things members see when they log in are old conversations or out-of-date news, they will not be motivated to contribute as much or as deeply as you need. Make sure you are directing members to fresh and active parts of the community. Think about non-research related tasks that tie into fun and topical events.

Tip 3: Create a community

While Insight communities are platforms built for research, they are also built for their members. Keep engagement high through polls & surveys with public results that encourage discussion, fun video tasks that build belonging and any activity in which members can get to know each other better.

Within the boundaries of what's acceptable, allow your community members to talk freely and add topics outside the scope of your research. This will help members to become more comfortable in the environment, reinforce that this is a space to voice their opinion and has the added benefit that you may discover issues and topics that matter to members without needing to prompt them.

Tip 4: In between research tasks

The most important element of community engagement isn't the actual research tasks. It's what happens in between them. Not every research task given to a community will need full community participation and some may only require a small sample of members. But without activities, engagement drops quickly. So you need to keep people active and engaged with the topic outside specified research tasks.

Tip 5: Feedback, feedback, feedback

One of the most important aspects of running an Insight Community is ensuring that its members feel appreciated. You need to regularly feedback through newsletters, member spotlights, behind-the-scenes content and of course by highlighting the impact of the research. Many people choose to join Insight Communities as they wish to positively impact brands they love, and so regular feedback is crucial to this. As well as regularly feeding back and thanking members, it is also key that you get their feedback. Ask members about their experience to ensure expectations are being met and they are happy to continue.

Tip 6: Squeaky wheels

While your ultimate goal is to have community members that are highly engaged, it will always be true that some will be much more engaged than others. They say 'the squeaky wheel gets the grease' but the potential issue with more vocal community members is that they may put others off with their strong opinions. These type of members can potentially sway research negatively if they are not effectively managed. Try giving them added responsibility within the community, perhaps as an ambassador or even an unofficial moderator. Use their passion to your advantage and have them working to encourage others and not just influence them.

Tip 7: Get personal

Insight Communities are often run by researchers/insight professionals who are always taught to be distant and objective with their findings. Sometimes this can spill over to how they run the community, which risks them becoming a faceless entity to your members. Your admins should try sharing personal experiences, adding to the discussion forums and bringing out a more human element if they want to engage members and win their trust.

Tip 8: Moderation

All open discussions in an Insight Community need moderation. The moderator's job is to make sure that members keep to the rules and standards of behaviour you've established for the community.

These standards will vary somewhat by community. Bad behaviour tends to be quite rare in an Insight Community (as people know that ultimately they'll lose their incentives if they get banned). But basic etiquette is still required - no personal abuse, no bigoted language, no harassment, and in most cases no profanity.

It's also common to ban off-topic conversations (i.e. discussions which veer off-course and get onto unrelated topics). A little off-topic conversation is harmless and can help build community bonds - sometimes you might even encourage it, like asking for pet photos as an engagement-building task. Other subjects, like politics, sex and religion, are best avoided entirely unless there's a strong link to the overall community topic.

Moderation in a community needs to be both proactive and reactive. Proactive moderation is about following conversations, setting a tone in starting them, and stepping in when needed to enforce rules and standards. Proactive moderation needs to be light touch - the community members should feel the CM team are part of the community rather than an external police force.

Reactive moderation is when a problem or breach is reported by a member. The key here is speed of response and consistency - the quicker you react to an issue and resolve it, the more trust members will have in your ability to step in in future.

As we say, most of the time behaviour in Insight Communities is good, or at least when compared to the wider online world!

Tip 9: Community health

So far in this step we've looked mostly at what the CM can do to keep individual members engaged. But what about the overall health of the community? How active is it? How many members is it gaining or losing? How many members are taking part in tasks?

These metrics aren't always obvious from looking at individual activity. For instance, a community might respond quickly to some kinds of tasks but slowly to others. Or an apparently busy community might conceal a high churn rate, which makes it more expensive to run.

The best way to deal with community health is regular reporting, which lets you establish trendlines and spot problems early. For a long term community, monthly data pulls are usually enough, and on a good platform the reporting can be easily automated.

The kind of metrics you should be looking at include:

Top-Up: how many new members are you replacing? Look closely at the onboarding and recruitment process where many new members don't become active and engaged.

Expulsion: how many members are you losing due to leaving, prolonged inactivity, or rule-breaking? A rise in this may mean a problem with engagement or moderation.

Activity: How often are members logging into the community? How often are they contributing? What is the task completion rate? These all let you detect engagement trends and offer warning signs of low engagement. You should also look at how these vary across tasks and (where applicable) segments - are some segments less engaged than others?

Satisfaction: Finally, one of the best ways to measure community health is to ask the community! Regular satisfaction surveys not only tell you how members are feeling, they tell members you care about that.

Your CM team and its engagement strategy makes a huge difference in the ROI and effectiveness of your community. It's also important to get rewards right, so in the next section we'll take a closer look at those.

Step seven:

Get your value exchange right

Get your value exchange right

When members feel their activities are recognised and rewarding, they will go above and beyond in providing detailed responses to tasks and creating more value for the community. If they feel overlooked or poorly rewarded, their participation levels will be low. Value exchange is often the difference between success and failure.

A community's value exchange involves:

Extrinsic rewards - things like vouchers, money, coupons etc.

Intrinsic rewards - the motivation to contribute and participate from likes, comments etc.

Here are four tips to rewarding your members:

Tip 1 Recruitment:

As we covered earlier, you need a user-friendly recruitment and onboarding process in order to create a good first impression and leave a new member feeling like community participation will be enjoyable. So as well as the profiling questions, give new members the ability to create a profile and potentially write an introductory post. You should also offer a first round of activities so new members get used to the interface and can earn their first points or rewards. This will "seal the deal" and make them feel more like a stakeholder in the community.

Tip 2 Reinforcement:

Reinforcement is about getting members used to the community by encouraging repeated actions. You're aiming to stem any drop-off between initial recruitment and active membership. This is where indicators of progress - like badges or membership levels - can be very useful. Give out your first badge or two quickly, and 'promote' a new member, and they may be more engaged and willing to continue and see what happens next.

If you're using a points system, you can introduce that here too. The main purpose of a points system is long-term motivation. It's important to calibrate early rewards so you don't discourage participants now (by making it seem as if rewards are far away) or set up future discouragement (by making early rewards too easy).

Tip 3 Recognition:

As a member settles into the community, the emphasis turns to recognition of the value they bring to it. The desire for recognition is a deeply human one which can act as a strong intrinsic motivation to continue taking part.

In an Insight Community, recognition comes in two forms. There's internal recognition and status within the community, which usually takes the form of badges, points and membership levels. The more you contribute, and the more useful your contributions, the more of these you automatically unlock. Specific recognition of individual posts by peers - like "likes" or Reddit-style "upvotes" is not recommended, as a public lack of recognition can be highly demotivating to a member.

The other form of recognition is external recognition - acknowledgement of the quality of contributions from the CM or end client team. This can be very valuable too and build motivation across the entire community rather than an individual. For instance, a newsletter which tells members about the praise given to the community by its end users, or about decisions taken or products launched on the back of it, will be very interesting to people who've been involved in the work.

Intrinsic motivation is one of the strongest advantages an Insight Community has over traditional research solutions. A stand-alone survey provides very limited intrinsic motivation. There's rarely ever any follow-up, there's no social context, so you're detached from any consequence of your answers. But in an Insight Community, every task you complete builds your connection to the community and your status within it. It can be an exceptionally powerful tool for keeping people engaged.

Tip 4 Rewards:

Of course, there's also still a place for more traditional forms of reward, like vouchers, charity donations or prize draw entries, which provide extrinsic motivation - the knowledge that doing something will result in some material gain.

These rewards should be gauged according to the audience. If you have a community of high-income B2B decision makers, for instance, they might find the idea of saving points for prize draw entries to be a little beneath them, charity donations might work better. Whereas a community of young tech users could be better incentivised by Apple or Android Store vouchers.

How might these reinforcements, recognitions and rewards work together in practice?

Recruitment

Emily joins an Insight Community for a FMCG brand. During onboarding she completes her profile questionnaire and welcome task and gets a profile completer badge" and first community points.

Reinforcement

Soon she's collected more badges. For activity like; the completion of ten tasks, doing a week of diary study tasks and for welcoming a new community member.

Recognition

A few months in and Emily's activity level is high enough that she gets entered for the monthly prize draw and wins one of the minor prizes (and a Prize Winner badge, of course.) Her CM has liked her comments and thanked her for providing detailed answers. She also appreciated reading in the community newsletter that a product idea she helped test has been approved for development next year. She's been on a community Zoom chat with the brand's CEO, who talked about how helpful the Insight Community had been and dropped some hints about an upcoming promotion.

Reward

Emily knows that her contributions are recognised and rewarded. She's been cashing in her points to take her family out for dinner. She's only 200 or so points away from upgrading her member status and getting onto the community's product preview perk, where she'll get exclusive early looks at new lines. Her motivation is high, she feels valued and rewarded, and she's usually one of the first to take part in new tasks. All down to a well-designed value exchange.

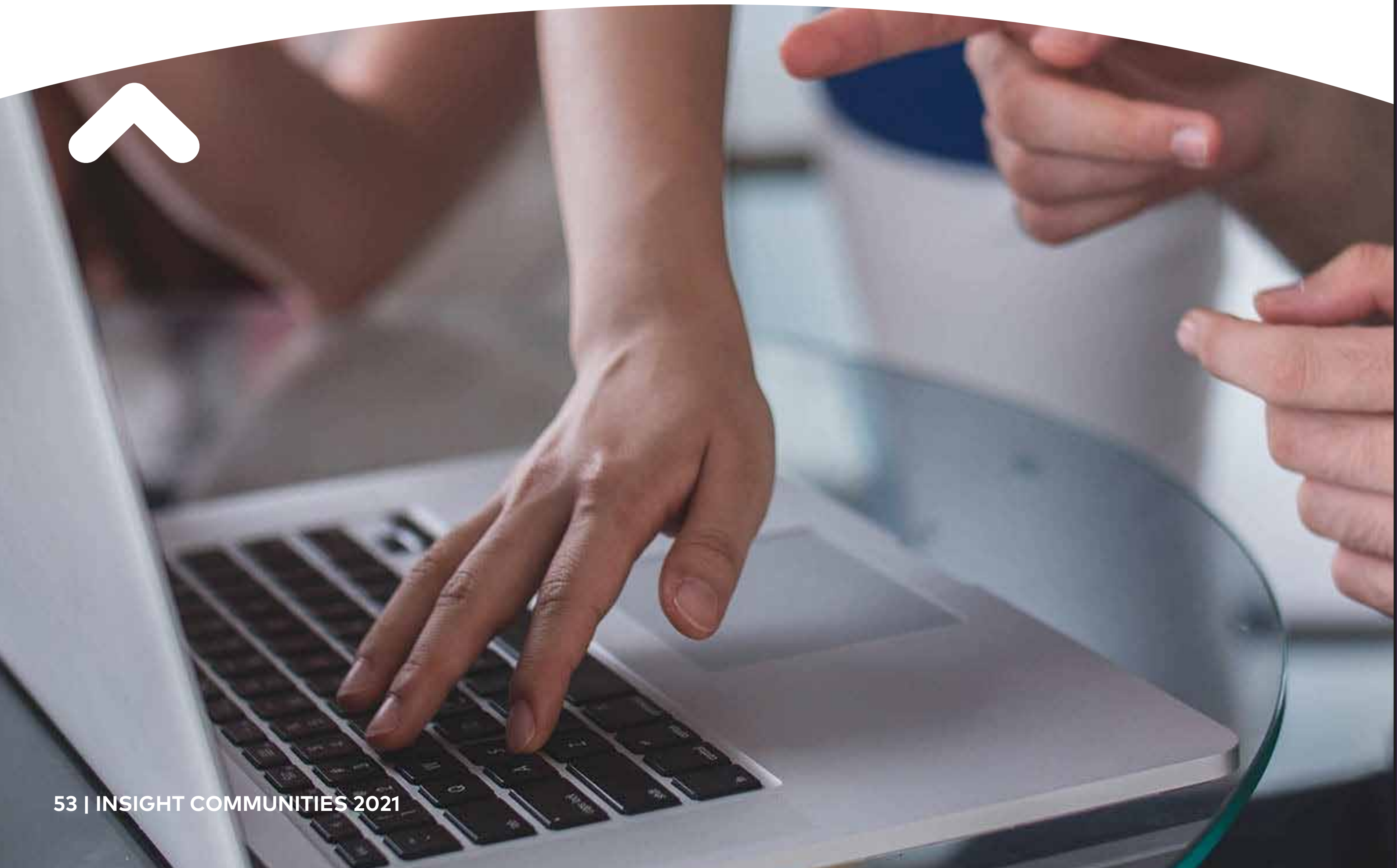
Step eight:

Data security & management

Data security & management

Trust is everything. Your brand needs to feel confident knows that its members won't steal or copy private information it shares with them. Your members need to know that their personal data and contributions are private and secure.

This all requires a strong data security framework that meets and may go beyond the regulatory requirements of the countries the community runs in.



Data security frameworks are probably too specific for us to get into in this ebook. They will vary between different markets, jurisdictions and industries. Here are just a few broad tips.

Accreditation: No matter who you choose as you your platform provider, its critical that they have the right accreditation to handle your data. At Researchbods we are accredited under ISO 27001, the international standard for data security and data processing. We have regular independent audits to ensure we continue to meet this standard. We are also registered as Data Controllers under several data classes which allow us to manage, process and store PII (personally identifiable information). We strictly adhere to a GDPR-compliant data processing policy and information security policy.

Membership levels: One of the easiest ways in which data can end up in the wrong hands, is if permissions and restrictions aren't set properly. Ensure all business and research team members have the correct level of access to platforms, communities, research tools and systems.

Duplication: Keep data within insight communities and analysis tools wherever possible. Try and avoid the duplication and keep the storage of data on local devices to an absolute minimum. We would generally recommend that research data is stored on encrypted cloud servers and not on hard drives or memory sticks. The less duplication, the less risk of data leaking.

Sharing: The less you share your data, the less privacy issues you'll have. This is particularly true when sharing on collaboration tools such as Slack, Microsoft Teams or Trello. When sharing insight from the community try and dashboards or encrypted email transfers when required.

A successful Insight Community needs mutual trust. The brand needs to know that participants won't steal or copy private information it shares with them. The participants need to know that their personal data and contributions are private and secure. The community supplier and managers are responsible for meeting these expectations.

Step nine:

Demonstrate return on investment

Demonstrate return on investment

In the first book in this series we talked about Insight Community ROI in a general sense. We looked at a number of ways in which it could be defined and tracked.

In this section we'll look at ROI from a slightly different angle, discussing the relationship between the platform provider, the community owner, and the internal stakeholders. A successful return ultimately derives from the level of understanding and partnership these parties achieve.

Tip 1: Relationship structure

The people running your community need to understand your business goals or the probability of achieving a solid ROI plummets. If your platform provider will also be running your community its critical that you manage that relationship.

All too often we've seen platform providers send senior people to a pitch who vanish as soon as it's won, leaving projects in the hands of far less experienced staff. You need a single, dedicated senior figure to serve as the point of contact and responsibility. Basing the relationship around a dedicated Client Director has several advantages.

- They will be in contact with different teams (data, research, etc.) within the provider for more effective, joined-up resolution of issues.
- They can build personal relationships with your own senior people and act as your advocate on the supplier-side with full understanding of the aspirations of the partnership.
- Senior involvement gives the platform provider more "skin in the game" - a greater stake in the community's success.
- A Client Director will have more business and marketing experience and can better understand your strategy, goals and issues, making it easier for the Insight Community to provide relevant solutions and genuine customer focus.

As well as establishing who will be managing the relationship, it's also important to establish the timelines and regular contact points At Researchbods we find a three-tiered contact structure works well.

- They will be in contact with different teams (data, research, etc.) within the provider for more effective, joined-up resolution of issues.
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With the right relationship and communication structures in place, it becomes a lot easier to define and measure ROI.

Tip 2: Sharing insights

In the hearts and minds of your stakeholders the community will be judged on how well it performs its central task - creating insights.

There's no shortage of debate in the market research world over what an "insight" is. For our purposes, let's define it this way:

An insight is a piece of customer knowledge that prompts action. If it's too big, or too small, or not relevant enough to prompt action, then it might still be a useful thing to know, but it's not an insight.

Your Insight Community has everything you need to generate insight that can prompt action. One of the most useful things about a community is its versatility of format - unlike a survey or a focus group, an Insight Community isn't limited to one type of output and offers many routes to customer closeness.

The range and versatility of output available from an Insight Community is a huge advantage. But it also requires editorial skills beyond standard survey reports - how do you select the best evidence and present it in the best light for your stakeholders? Storytelling skills are essential for demonstrating insight - and with it, ROI.

Tip 3: Storytelling

There are thousands of ways to tell a story. But not everyone is a born storyteller, and not every storytelling principle is useful in the time-pressured world of business. Use templates to make it quick and easy to turn customer knowledge into convincing insight that prompts action.

We've found a three-stage storytelling framework is the most useful at doing this:

Clear argument: "What do I need to know?" Answering this means answering the project objectives and giving a clear recommendation. The most important word here is need - this isn't the time for interesting side findings, it's about cutting down the study to its most essential and useable information.

Credible data: The second question is "Why should I believe you?". The person you're telling the story to might never be so blunt, of course - but the person they tell it to might be more sceptical. This is where you collate your best evidence - be it behavioural data, survey responses or qualitative verbatims. Don't tell any story you can't back up, and don't back it up with things that aren't relevant.

Emotional connection: The third question is "Why should I care?". What you've got so far is a bunch of useful facts - answering this makes it a story. This is where you hook your insight into your audience's concerns, desires and motivations - which in a business context will usually mean giving some ideas as to what problems this insight will solve and why it will help.

This storytelling framework makes insights easier to use and more impactful in a business. It also makes them easier to pass on. The aim is always to build insights which stand alone, rather than requiring someone there to explain them.

Tip 4: Evidence

In the first book in this series we looked at some of the ways in which an Insight Community typically provides ROI for a business. This is an incomplete list but gives some idea of the sources of ROI from an Insight Community.

How has the Insight Community and the projects run through it helped stakeholders? Have its insights been valuable? Has it provided strong findings for negotiations with buyers or suppliers? Has it made senior people's job easier? Have processes changed because of it? This might be a bit tricky to measure but by looking through the different projects you've used your community for, you'll soon have a good idea on the impact it might have had.

Value creation: Creating value. Saving money. Preventing losses. These are the three broad ways in which insight can help you to support profitability and growth. Value creation is the most eye-catching of these. Has the Insight Community led to decisions which have created new value for the business – for instance product launches, changes in policy, or other customer closeness initiatives?

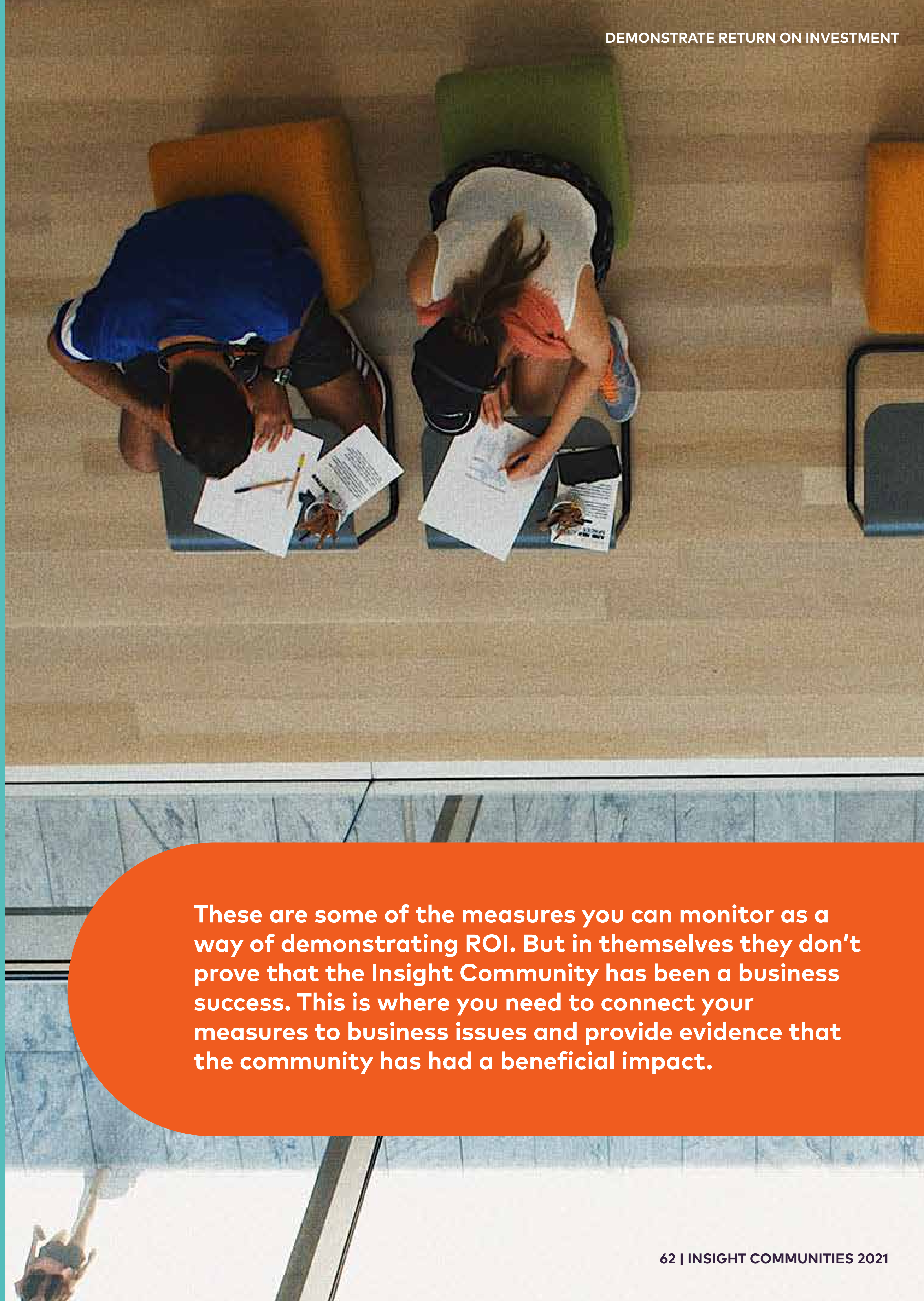
Cost efficiencies: Has an Insight Community identified efficiencies and saved the business money? In many cases an Insight Community will itself be a long-term cost efficiency compared to the cost of the discrete research pieces it replaces. The feedback from the community can also be vital for identifying areas of low priority for customers where money can be saved.

Loss prevention: Prevent your brand from making mistakes and bad investments. Whilst Insight Communities can help with this, it's the hardest to prove the value of, since it's tricky to measure predicted losses. In some cases, though, the advice of an Insight Community will have been critical preventing such errors.

Insight accessibility: A community that makes insight more accessible and more embedded within the business is doing a good job, and this can be measured in multiple ways - views of outputs, internal email open and click rates, qualitative or survey feedback, and requests for user access.

Volume & value of insight: One major reason for running an insight community is to replace and expand on existing research work while saving money in the long term. Run more projects and deliver more results, while reducing the cost.

Cross-charging: Some brands run their insight community as a chargeable internal resource, with other units/functions paying to conduct projects through it. If this is the case, ROI will be whether the community is paying for itself via internal usage.



These are some of the measures you can monitor as a way of demonstrating ROI. But in themselves they don't prove that the Insight Community has been a business success. This is where you need to connect your measures to business issues and provide evidence that the community has had a beneficial impact.

Step ten:
Create amazing outputs

Create amazing outputs

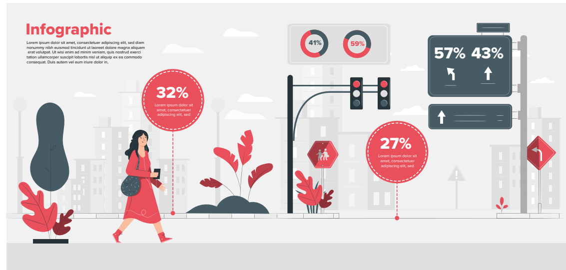
The more people see and use your outputs, the more authority and visibility the Insight Community has as a source of information, and the more stakeholder involvement and usage there is.

Sharing your outputs means knowing your audiences. Some people will be too busy to want more than executive summaries and infographics. Others will appreciate a more comprehensive report. Some will respond best to short and snappy video content. The same insights can and should be presented in all these different ways.

Every output format should be well and consistently designed. For long term communities it's well worth producing output templates as you would for any other packaged research product, and a "look and feel" guide with notes on images, fonts, colours, tone of voice, language, and so on.

Infographics:

Get your insight across in an instant. A well-designed infographic is ideal for audiences with limited time or low exposure to a project who should still understand the top-level insight.



Executive summaries /action documents:

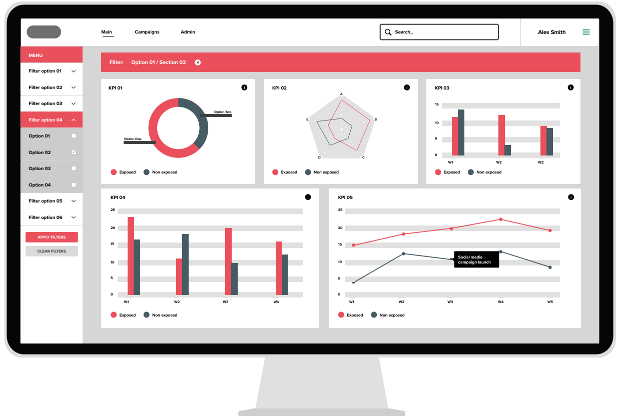
For senior staff members you may want a more formal document than an infographic. A single-sheet document or short presentation giving the core insights and recommendations. Here is where the storytelling approach outlined above - "What do I need to know? Why should I believe you? Why should I care?" - is crucially important to communicate the key points in a well-evidenced and emotionally convincing way.

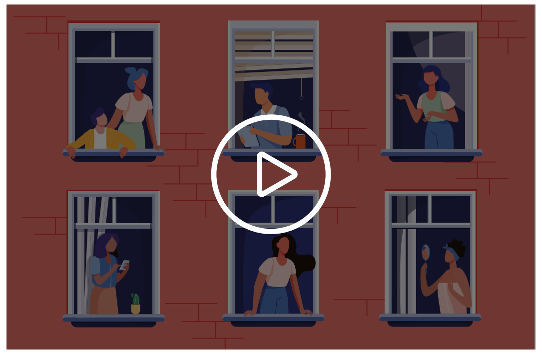
Community reports:

The executive summary can also form part of a longer report (though still only 10-15 slides) which can go into more depth on both the insights and how they were obtained. The report is a more comprehensive record of the project designed for stakeholders with a closer interest in it and also as a basic document the team can refer to in future.

Dashboards:

For ongoing and long-term communities, a reporting dashboard with KPIs, recent posts and content, and core statistics can be a useful way of embedding an Insight Community within a company. The content of a dashboard needs to be carefully calibrated. It will be a major point of interface between the Insight Community and the wider business. If the dashboard updates too rarely or has little new information, it will give the impression of a moribund community. On the other hand, a dashboard that's too cluttered is difficult to usefully interpret.





Video:

Video is one of the most powerful Insight Community tools, both internally and externally. We would recommend using video regularly during the onboarding process for new members and using it alongside text to explain core tasks and processes. As well as making the community feel more human, it sets a good example to participants who will be expected to create and upload their own videos.

Video is great for community outputs. it adds authenticity, richness, and variety. That said, video is often poorly used. Video outputs used to summarise key points or provide flavour should aim to be 45 seconds long at most. And they should make use of editing and multimedia – videos of someone talking to camera are much less impactful!

6 pitfalls to avoid

When it comes to Insight Communities, it's safe to say we know our stuff. With over a decade of experience and a few hundred communities under our belt, our team understand all the small elements that add up to make a worthwhile community.

That's not to say we haven't seen our fair share of mistakes along the way, here are 6 common pitfalls we've seen clients make, so you don't have to...

Pitfall 1: Rushing into a platform

Let's be honest. We've all fallen for a slick demo at one time or another. All too often the features that got us excited don't quite work as well in real-life as they did when the sales-person was showing us, or they only work in very specific circumstances.

Lots of our clients have switched to us after getting stuck with an inflexible platform that doesn't suit their needs.

Whilst we'd like to think our platform, ex-plor has some pretty neat features we always advise clients to focus on the flexibility of a platform, the ease in which they can integrate data and the people behind the platform.

Pitfall 2: Onboarding

Onboarding a bit of a juggling act. You need ensure that your critical info on members is captured whilst also creating an onboarding process which is painless for participants.

Make sure your team thinks carefully about the critical info you'll need as getting this further down the line may be a lot more difficult.

Profiles needs to be linked back to the objectives of the community and data needs to be captured in a user-friendly way.

Pitfall 3: Bias

Who wouldn't love the idea of loyal fans cheering them on? Insight Communities often attract people who are passionate about the brand, but this means that they are not a representative research tool.

You can't allow your community to slide too far out of step with feelings and behaviours of the wider world. If your business is performing poorly, you might need to hear some hard truths and this is where its healthy to balance your members with fans, buyers and lapsed or non-customers. If you spot some consistent bias sneaking into your outputs, you may need to do an overhaul of your membership or go on a recruitment spree.

Pitfall 4: Rewards

We're always talking about the value in listening. It's amazing some of the insight and themes you can pick up just through listening to what your members are saying. This is also true of rewards. Many brands struggle to come up with a reward model, but don't ask their own members!

Trust us this is something people are always happy to talk about and understanding the mix of intrinsic and material rewards members want is crucial to your value exchange.

Pitfall 5: Stakeholders

Members aren't the only ones who need a little love and attention. Stakeholders are often only involved in the planning and launch of a community and then somewhat forgotten about.

You might be thinking about your community every day, but others won't. It's just as important to keep re-engaging stakeholders as it is your members.

Pitfall 6: Outputs

We all learn in different ways. Whilst variety may be the spice of life you can waste some serious time creating outputs that are never really used. Be sure to ask for plenty of feedback on the info and format that different stakeholders need. Do a test run and see how long it will take you, even if your dashboards may not be set up or showing the relevant data yet.

End note

Hopefully this book has given you a sense of how Insight Communities work and what they're good for. By reading it you've gained an understanding of the framework of a community - the essential parameters and KPIs that define one.

You should be in a position now to build a powerful case for using one in your business. You might also want some expert advice. Researchbods is here to provide it - we'd love to answer any questions you have coming out of this book and help you put together a plan for an Insight Community of your own.

If you've found this book useful, be sure to download the other two books in our series, which will take you through running a community and go into more detail about turning it into a strategic business asset.

Thanks for reading!

About Researchbods

Researchbods is a STRAT7 company that helps brands and agencies find their insight edge. It blends powerful, innovative insight technology and vast in-house experience to fuel its clients' strategic decision making and competitive advantage.

Working across Retail & FMCG, Financial Services, Media & Technology, Travel & Entertainment, and Pharma & Healthcare, Researchbods help brands engage with millions of consumers in real-time. This enables organisations to understand what customers really think of them, want from them, and how emerging trends might alter their strategies.

Thanks to unique tools like ex-plor, Researchbods' market-leading Insight Community platform, brands can uncover greater levels of customer closeness; stress-test their brand strategies; stay on top of a changing world with fast access to millions of global consumers; maximise campaign impact; innovate and create better products and services by identifying what works and what doesn't. Researchbods is a game-changer for brands who want to move ahead of the competition and stay there.

For more information visit researchbods.strat7.com.

Demo the ex-plor platform **today**

Bring the customer voice to life. Get 24/7 insights from deeply profiled consumers in a safe and secure online environment. Gain a single view of your customer's changing needs, by combining your data sources to truly supercharge your strategy.

Massive quantitative toolkit

Dig deeper with hundreds of question types at your disposal. From brand affinity, heatmaps, media evaluators, to complex pricing/statistical techniques such as Gabor-Granger and Van Westendorp, we've got you covered.

Immersive qualitative modules

Discover what's driving customer choices with tools such as discussion rooms, forums, diary studies, interactive maps and online focus groups. We make it super easy to pull out trends and themes your customers are talking about.

Reporting and analysis

We make it effortless to interpret, understand and visualise the data you're collecting. These include live cross tabs (with sign testing and weighting), automated PowerPoint charting and interactive dashboards. Share insight across your organisation with just a few clicks.

Intuitive admin site

Manage the key metrics of your community's health and learn about your members past and future behaviours. AI and machine learning gets you those key metrics quick and our team help you to understand what actions to take to keep your community engaged.

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