The Modern Insight Professional's Playbook:

8 conversational research principles that reveal what people *actually* think, feel and do

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Introduction

The world has changed in profound ways thanks to the global pandemic. From how we work, to how we learn, to how we communicate and how we buy, COVID-19 has forever altered our daily routines and accelerated a shift towards lifestyles that are more geographically dispersed, yet always connected, thanks to ubiquitous mobile-based technologies.
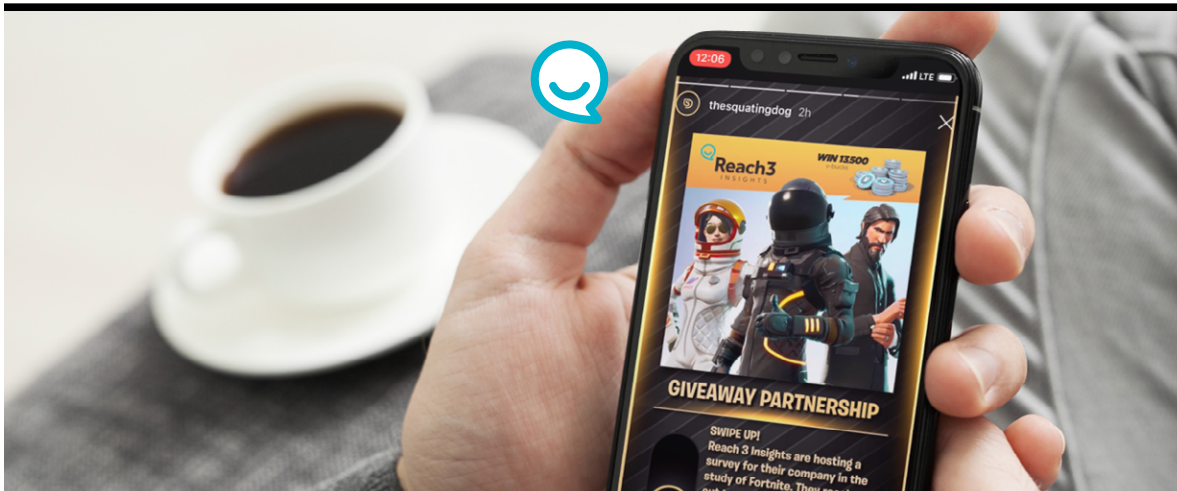
As we slowly emerge from what seems like a two-year winter, it's a good time for brands to take stock of where they are—especially when it comes to their relationship with consumers. But how well equipped are most companies to respond to this transformed consumer landscape?

While the world adjusted to COVID-induced change, brands were also forced to migrate away from age-old consumer research approaches like focus groups and quickly adopt more remote & mobile methods for capturing insights. But it's not enough to simply migrate traditional research approaches into a remote, mobile context. Instead, there is an opportunity for brands to completely re-imagine how they engage consumers within this newly remote world, transforming age-old consumer insights methodologies to be more human, organic, and empathetic – evolving research design to feel less like taking a test and be more closely aligned with how consumers are actually living their daily lives in a post pandemic world.

Conversational insight approaches offer just this, enabling brands to engage with people in a more natural way, capturing ongoing, continuous insights via the mobile devices that nearly every global citizen owns today. But what exactly does it mean to be conversational? And how can brands apply this approach to their insights toolkit so they can truly understand what their customer's think, feel and do?

In publishing The Modern Insight Professional's Playbook, we outline eight core principles of conversational research design that Reach3 has employed to help brands across industries and around the world get closer to their customers in a time of social distance. Leveraging the mobile messaging-based platform developed by our sister company, Rival Technologies, we're engaging consumer and business populations in real-time, leveraging modern communications channels to answer fundamental business questions in increasingly diverse and dynamic markets.

While mobile-based research was accelerating prior to the pandemic, it is now a must-have capability for any company trying to better anticipate consumer behaviors and routines. By incorporating conversational research design principles into these mobile approaches, we have a chance to not only provide a better way to engage, but offer real benefits in terms of depth and richness of insights. When employed correctly, this powerful combination of mobile technology and conversational research design can drive stronger customer relationships and better business outcomes.
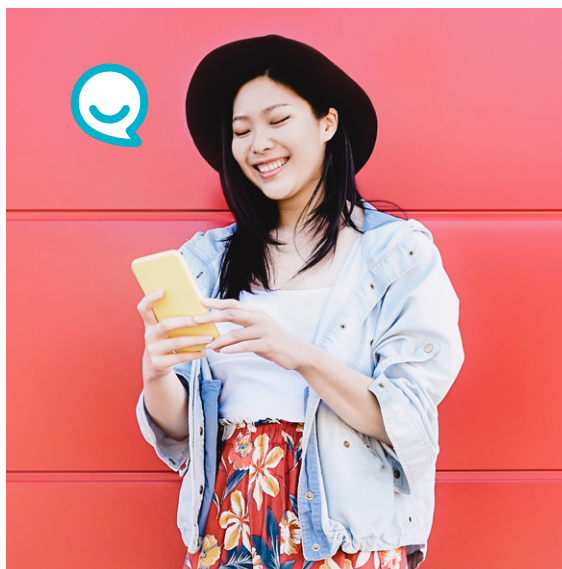
NO. 1   Get Real

Connect with real people, through the communications channels they actually use, for more authentic results

Marketers have been talking about the need to reach "unheard voices" and include more "real people" in their research for years. And still, researchers return to the same old methods—using a pool of panel-based professional respondents—hoping that, maybe this time, they'll capture fresh and more authentic insights.

The need for a new approach is undeniable. Consider these two stats alone: there are now over 67 million Gen Zs in the U.S. (those born after 1997), a cohort that will soon pass the Boomers in size; and the U.S.'s Hispanic population increased from almost 51 million to almost 61 million in less than 10 years, accounting for half of the country's total population growth between 2010 and 2019. And yet these two

populations are often the most underrepresented in traditional consumer research panel samples, with response rates less than 5%.

At Reach3, we employ a wide variety of multi-faceted sampling techniques—from immersive recruitment on popular social media channels to in-the-moment engagement through QR codes. It's all part of a mission to connect with real people where they live and breathe—and where they can provide meaningful feedback for the brands and products they use.

A recent proprietary study of gamers is a great example of how this

> ## "Researchers need to adapt to this reality—a profound generational and multicultural shift—because the market, and consumers, demand it.

can happen. The highly coveted gaming demographic—a younger cohort of digital natives, largely allergic to consumer research panels and traditional email surveys—are sold a lot of goods and services each year, but aren't well understood by marketers. To better

understand the motivations behind their behaviors, we [reached out to these gamers](#) where they spend their free time—engaging them using conversational research tools with the help of a well-respected gaming influencer.

16-24	<12 hrs	900	60%+
gamers' age range	time to collect responses	interviews	response rates

Leveraging the influencer's nearly 200,000 followers, we intercepted gamers with a conversational chat within Instagram—something that kept them on the platform while allowing us to ask a few questions. In less than 12 hours, we were able to complete over 900 interviews with gamers aged 16 to 24—achieving 60%+ response rates and results at a scale and cost that a traditional panel couldn't beat. Each consumer has their own set of interests and passions. They engage with the world in their own unique ways, form their own distinct communities and inhabit their own distinct channels. As modern insight professionals, we need to engage our "future customers" where they already are—to drive brand growth now and in the years to come.

NO.2

Be Present

Engage with people when behaviors actually happen.

It used to be that market researchers could comfortably live in the past: Design a smart survey, ask participants to complete it—and then wait a couple weeks for the results to roll in. But this traditional approach to research requires a critical leap of faith: You have to believe that people will actually accurately recall and record their true behaviors.

But consumers sometimes fudge the facts—or misremember what happened the night or week before. That is the inherent problem of recall bias: recollections are never complete, even when they're honest. And that's why research techniques are most effective when behavior is fresh.

This need for in-the-moment insights was one of the reasons we were approached by Jägermeister, the iconic maker of its namesake digestif. The company is best-known for its Jägerbomb—a combo of Jäger and energy drink (often Red Bull) that's a staple of late-night escapades everywhere. But Jägermeister was keen to explore new opportunities for how the drink might be consumed—and the occasions it might be consumed in.

For Jäger, much of the brand identity was tied up (mentally speaking) in the group-night-out ritual: stepping up to the bar and ordering a round of Jägerbombs for the gang. But little was understood about how individuals might respond to the brand on their own, and in a different context. Could it be used in a cocktail? What about a coffee-based drink? In what other ways could Jäger be top of mind? And how might this vary by generational cohort?

Using our mobile-messaging research platform, we assumed the role of quantitative ethnographers, engaging legal-age drinkers in a variety of contexts. At home. At the bar. At the restaurant. We surveyed a mix of Millennials, Baby Boomers

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and Gen Xers, using conversational techniques that included an initial chat survey, with selfie videos of their experiences, and a follow-up mobile text notification that asked for reactions to potential new brand positionings and drink concepts.

Whether you're ordering a gin and tonic or a cold brew and Jäger, it's ultimately an emotional and intuitive choice. For modern insight professionals to understand and respond to something that immediate, they have to be engaged with consumers as they're about to place that order—and not after they've settled the bill.

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NO. 3

Engage

Get consumers out of "test-taking" mode.

When you meet someone for the first time, how do you hope that conversation goes? Do you want to feel like you're being interrogated or tested? That can feel off-putting and will likely result in you cutting the conversation short.

At Reach3, we've built our research strategy around a simple idea: that getting people out of test-taking mode—and engaging them using a conversational style— captures deeper, richer and more authentic human insights.

A good case-in-point is our recent work with a global consumer health company. The company had been doing traditional research with young mothers—one of the key target markets for their children's pain-control product. They noticed that usage for the

product was dropping off among kids after the age of two, and they needed to understand why.

The company had been using a traditional email-based survey methodology before coming to Reach3—a rear-view mirror approach that asked mothers to recall why they were buying certain products and not others. But after several traditional email surveys, the company said they were no further along in understanding the true reason behind the sales decline.

Young mothers, like all of us, are more likely to check mobile messages while actively living their lives. We are all looking for distractions in our daily routines—be it waiting at the daycare or in the grocery checkout line—and as recent Wharton studies show, when we respond to messages on our smartphones, we're more likely to share our honest feelings.

> **We engaged hundreds of these mothers in the moment—for a few minutes at a time—and used selfie-videos and instant-messaging-based conversational techniques to build engagement.**

The exercises felt like a real conversation, which built trust with the moms. And that trust led to more candid responses. We discovered that moms stopped buying the painkiller for their kids because of something quite simple: incomplete brand messaging.

As the women explained, when young kids start to teethe, there's a lot of pain associated with that—and a competing brand was doing a better job of explicitly promoting its effectiveness in combatting teething pain.

It was, in the end, an insight hiding in plain sight—but one that wasn't picked up using a traditional email-based survey approach.

Sometimes you need to put down the textbook, skip the test—and join consumers in the conversations they're already having

NO. 4

Respect People's Time
Embrace the Need for Speed.

Today, the business world is changing at breakneck speed—but when it comes to consumer research, most brands are moving too slowly. Thanks to ubiquitous social media and the ever-present instant messaging platforms that we communicate on, the window to capture consumer thoughts and opinions has shrunk to mere minutes, sometimes seconds.

According to recent studies, 90 percent of people read an SMS message within the first three minutes of it being sent; 95 percent of text messages are read immediately. Compare that to studies that show that over 50 percent of email—still, by far, the most popular method of deploying surveys around the world—are deleted without ever being read.

For insight professionals, being able to respond quickly—in both proactive and reactive ways—is critical to a brand's success. In 2002, an email survey might have been seen as cutting edge—but in 2022, with everyone drowning in emails, brands need to leverage the speed and immediacy of mobile messaging-based insights to quickly engage consumers.

As consumer habits and preferences were changing rapidly during the COVID-19 lock-down, many companies came to Reach3 looking for answers on how the pandemic might impact their businesses. One of these clients, Brunswick (the largest maker of pleasure boats), had the good fortune of having a massive influx of new customers looking for outdoor, socially distanced recreational activities.

> **We interact with the Ripl community all the time....we keep listening and learning as we go forward. Luckily, we have new tools to be able to do that. It used to be, you did a survey every year—that's not very dynamic, right?...If you can get out there and get responses in hours, it's a super-cool thing to do."**
>
> **Dave Foulkes,** CEO of Brunswick

Brunswick needed to better understand the needs and expectations of these new customers—at a rapid pace. Working with Reach3 and Rival's mobile market research platform, Brunswick quickly created

Ripl, a customer community for new boaters that enabled them to quickly and continuously collect rigorous quantitative data and deeper, richer qualitative feedback from their consumers in one agile learning platform. Using mobile messaging-based text notifications, Brunswick was able to quickly engage boaters in-the-moment, making insight-driven decisions in a matter of hours and days—not weeks or months.

We've also worked with the Vancouver Canucks hockey team in recent years to help that organization better understand the fan experience and discover factors that convert fans into season ticket holders. At Canucks home games, using fans' cellphones we were able to capture "in the moment" insights—and fast. Fully 33 percent of the Canucks fans surveyed responded within the first six minutes, with average response rates between 50 and 70 percent.

33%

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In 2022, brands are realizing that having fast, instant consumer insights is critical to staying ahead of emerging trends. Keeping close with consumers—wherever they are, however they're communicating—is the new speed of doing business.

NO. 5

Go Deep

Capture 3D insights—behaviors, emotions and context—in one research touchpoint.

Everybody agrees: insight professionals are swimming (some say drowning) in data. But what does it all mean? For brands to succeed in a post-pandemic world, they'll need to move beyond the data entrails—which help us to see what's happened in the past—and start capturing the emotions and context driving future behaviors.

This "trifecta" of information—what we call "3-D Insights"—is a key benefit of conversational research design, blending a robust knowledge of behaviors along with a deep understanding of emotions and context.

The end result? A more holistic view of why behaviors are happening—and, more importantly, where the market is headed.

In the early months of the pandemic, Reach3 did a [series of studies with consumers of Tyson Foods](#) (the multinational company behind Hillshire Farm, Sara Lee and Bosco's) that explored how morning routines were changing and evolving. What breakfast looked like in many households had been severely disrupted by COVID: moms and dads weren't commuting to work, and kids weren't going to school. There were no quick bites of something as you waited for your train or sat idling in morning traffic.

> ## "Video, in particular, was critical to capturing those elusive emotional elements.

Tyson could see the change happening in its sales numbers and knew that COVID was behind the trendlines. But they wanted to better understand the specific emotions and context driving that change. To help them, we developed a modern version of the consumer diary— engaging hundreds of consumers during their morning routines,

both on weekdays and weekends. We asked them to capture these insights via short text-based chat surveys, photos and videos.

Using video selfies, Tyson consumers would talk to us while they prepared breakfast for their family. They'd flip their cameras and show us what they were preparing. We could see the context of their decision-making and the meal-prep process: Who was in the room? What was in the fridge? What did the scene look like: was it peaceful or chaotic?

For Tyson, understanding those emotional decisions—and getting as close as possible to the human context—has allowed them to develop a future innovation pipeline that better meets the needs of its consumers. The old-school way of capturing consumers insights—having people fill out an online survey, days after the activity has happened—simply won't cut it anymore.

NO. 6 Continue the Dialogue

Re-engage to drive ongoing, iterative learning.

Business relationships—be they customers, suppliers, or consumers at large—have many parallels with the dating world. We all say we want romance—but we often settle for something much more transactional. If you give me A, I'll give you B—and then we will part and go our merry ways. In the dating world, you might call that a one-night stand.
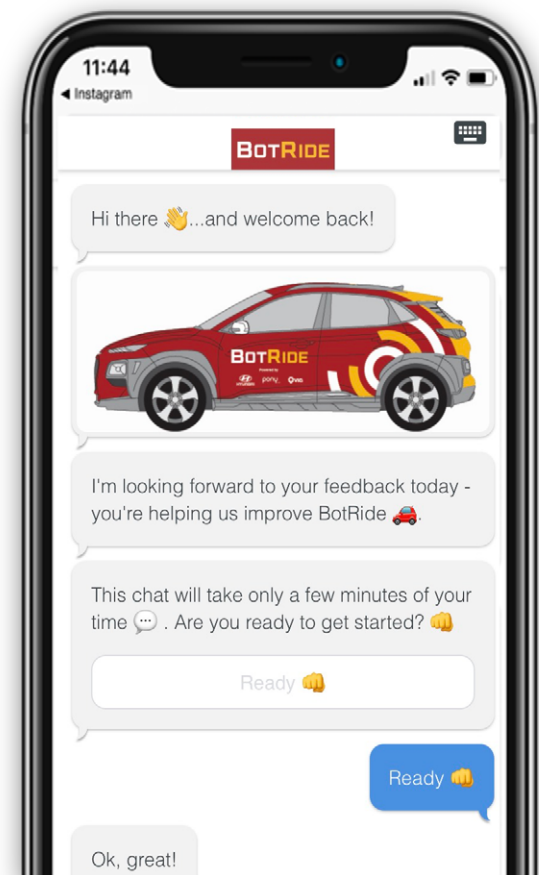
Smart marketers now realize the importance of building meaningful, long-lasting relationships with consumers—and ditching the one-night stand. The good news is that, in the age of mobile messaging and mobile messaging-based notifications, it is easier than ever to do just that.

A good example of how this works is a research program we conducted with automaker Hyundai. The company was testing a new service, called BotRide, that combined on-demand ride services with autonomous, self-driving vehicles. They wanted to gather feedback and track attitudes and perceptions throughout the entire pilot program, capturing in-depth customer experience (CX) data on the sign-up process, app usability and in-vehicle ride.

Using Reach3's mobile messaging-based techniques, we were able to capture in-the-moment insights—both quantitative and qualitative, as well as rich contextual videos, photos and screen captures of elements that both delighted and frustrated consumers throughout the pilot. This included in-depth User Experience (UX) data on the online sign-up process and mobile app—with consumers walking us through their navigation of these digital touchpoints and identifying aspects that were confusing, counterintuitive or tension-inducing. Then, we re-engaged with these same consumers during their rides. Using QR codes located on the back seat of BotRide vehicles, we triggered in-ride conversational surveys: by simply hovering a

"Each question you ask is an opportunity to build upon your learnings.

mobile camera over the code, users were able to provide instantaneous feedback. Hyundai captured a full perspective on the BotRide experience—everything from the quality of the ride, to safety perceptions, to how the pick-up and drop-off process was perceived. At the end, we engaged with riders for in-depth live interviews (via video) to further explore their BotRide experience—which Hyundai was able to observe in real time.

In this new world where consumers are just a mobile notification away, each question you ask is an opportunity to build upon your learnings, advance the conversation—and be that "good date" that people want to engage with, over and over again.

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NO. 7

Represent Yourself Well

Elevate your brand through the participant experience.

One of the surest signs the world is returning to "normal" has been the rebound of travel—and the suddenly bustling airports from coast to coast. But while many of us are looking forward to that first vacation in years—or even a long-delayed business trip to meet key clients—none of us need a reminder of how the travel sector is failing to keep up with the times.

For anyone who is part of an airline loyalty program, you'll know what I mean. Think of that last five-hour flight from LAX to JFK. Maybe the flight was 45 minutes delayed. Perhaps they ran out of one of the entrées. Or maybe you encountered a surly ticket agent upon check-in. Regardless, it will be days before you get that email, saying

that they "really value your feedback" and that they'd like to conduct "a quick survey about your recent flying experience."

The survey—if it makes it out of your junk filter—will not be quick, however. And it will ask a lot of questions the airline should already know—like what flight you were on, or how you rate their on-time performance. This sort of interaction is a real detriment to the brand experience—showing their most valuable customers that they're out of touch with their needs.

For all the money that brands spend on advertising—and positioning themselves in a positive light with their target audience—the research process often feels very disconnected. In many instances, it can actually reinforce a negative perception of the brand. Leveraging a modern, in-the-moment approach to research is key to not only building a positive brand perception but also amplifying the brand experience.

A good example of that is our work with Revolt Media & TV: Sean "Diddy" Combs' premium cable network. A couple of years ago, we worked with the company to engage attendees at its first-ever Revolt Summit in Atlanta: a multi-day event to celebrate the power

of hip-hop and its cultural impact. Using Rival's mobile-first technology, we were able to create six conversational surveys throughout the Revolt summit—capturing both qualitative and quantitative feedback, and recruiting many research participants via QR codes to make the process easy and seamless.

89%
of attendees said they had a positive reaction

98%
of attendees said they'd likey attend again

Equally important, we made sure that the conversational chats reflected Revolt's fun vibe and brand personality. The net positive for Revolt was clear: 89% of attendees said they had a very positive reaction to the summit, while 98% said they'd likely attend again. Afterward, Revolt's VP of Insights and Strategy posted on LinkedIn that the survey completion rates were the highest she'd seen in her entire career.
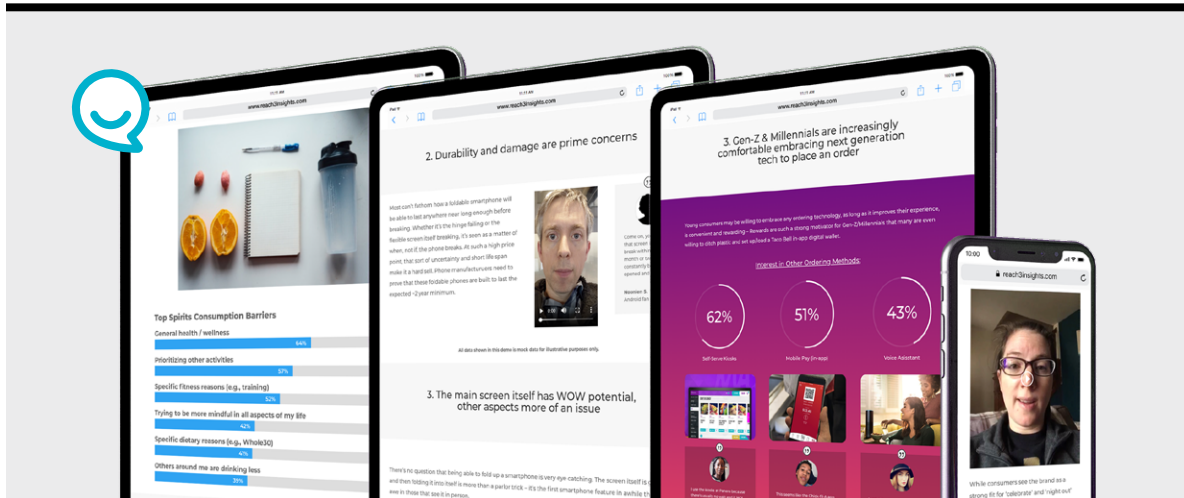
Over the course of the pandemic, the bar was raised on what customers expect from brands in market research—with increasingly personalized content and frictionless use of technology becoming table stakes for most brand experiences. Whatever the future holds, a return to 2019 is clearly not an option.

NO. 8

Tell Compelling Stories

Activate your insights through innovative mobile & video deliverables.

If you spend any time on LinkedIn, you might think that everybody is a storyteller these days. It's become one of the most popular ways to describe one's work—because, frankly, everybody loves a good story. And yet here's a simple truth: not everybody is good at telling stories.

The central challenge market researchers face is clear: How do you activate the insights, throughout the enterprise, for maximum impact? And the answer is equally clear: Good storytelling. As Jeff Gothelf laid out in a recent Harvard Business Review article, there are five essential rules for effective storytelling: (1) Be audience-specific; (2) Contextualize your story; (3) Humanize your story; (4) Make it action-oriented; and (5) Keep it humble.

Five essential rules for effective storytelling

1	2	3	4	5
Be audience-specific	Contextualize your story	Humanize your story	Make it action-oriented	Keep it humble

Having that rich level of insight has been especially critical to consumer product brands during the pandemic, given the rapid rise of e-commerce adoption. Both Kellogg's and Kimberly-Clark, for instance, turned to Reach3 to better understand how grocery shopping was evolving so they could help their key retail partners—but also contextualize their shoppers during a stressful period in their lives. We used our mobile-based approach to engage hundreds of shoppers—and we delivered the results in a curated, dynamic mobile deliverable featuring shopper videos that helped to activate results throughout their organizations. Kimberly-Clark was even able to pass clear recommendations over a key retail partner who made UX changes to their mobile ordering app that contributed to a 20% sales increase within 6 months.

Video and other visual tools illuminate the customer experience and—combined with data, charts and graphs—help stakeholders, inside and outside your organization, to better understand consumer needs.

Perhaps most critically, this rich media mix ensures that there is activation on your insights—and that all that important market research doesn't just end up collecting dust on a shelf.

To be a storyteller today, you need to move beyond the data set or dashboard and put away the slide deck; you need, instead, to put customers front and center.

Conclusion

Back in 1992, Bruce Springsteen released a song called "57 Channels (and Nothin' On)"—a fairly on-the-nose critique of what was then a relatively new and expanding cable TV universe. Of course, 57 channels seemed quaint just a couple years later—57 quickly became 570 channels—and today, consumers can watch anything, anytime and communicate with anyone across the world via the phone in their pocket.

The ways in which brands can reach and analyze consumers have expanded exponentially as well. In this era of the always-on consumer, it's no longer enough for brands to "be available" or even to "be the best." They also have to be the most responsive, most engaging—and most prepared to shift course at a moment's notice.

That sort of dynamic approach to market research is not new. But how brands show that they are responsive—that they are engaged— is changing. Consumers want to have conversations, both intimate and honest, with brands—and brands need the technological tools to make that happen. It's not enough to simply take traditional approaches to market research and move them move them into the mobile context.

Brands need some foundational principles for how to engage with consumers in a more conversational way—and to meet them where they are, using the methods of communications that they use most (yes, that means mobile). And then be able to take those learnings and translate them from insights into action.

The eight principles of conversational research design we have presented here are universal to how brands need to think about the future of insights. They are, in fact, future-proof principles that have been shown to produce greater depth and richness in their results, and also drive better business outcomes.

Consumers have proven themselves resilient in the face of adversity during COVID—and remarkably adept at changing with the times. For brands wanting to thrive in the years to come, demonstrating equal resilience—and showing an equal comfort with change—will be key for building a greater human connection with consumers, and stronger, more resilient brand relationships.

About Reach3 Insights

Reach3 Insights is a full-service research consultancy that develops scalable, conversational insight solutions for today's modern, agile enterprise. Led by CEO Matt Kleinschmit, the company uses immersive, in-the-moment research designs and dynamic digital storytelling to deliver deep experiential insights that inspire action. Reach3's growing client base now includes industry-leading brands such as Kimberly Clark, Diageo, Tyson Foods. Kellogg's, Brunswick Corporation, Jägermeister, Snapchat, and Hyundai. Reach3 Insights is part of Rival Group and a sister company to Rival Technologies. For more information, visit reach3insights.com.

About Rival Technologies

Rival Technologies is the company behind the world's first enterprise-grade mobile messaging-based market research platform. The company's solutions enable industry-leading brands such as Kellogg's, Paramount, Diageo and Roblox to create Mobile Communities of consumers they can continuously engage for insights. By leveraging the smartphone's chat, video, and voice technologies, the Rival platform enables marketers and researchers from global brands to capture robust quantitative and rich qualitative feedback and unlock the fast, iterative and ongoing insights they need to improve business outcomes. Rival Technologies is part of the Rival Group and a sister company to Reach3 Insights. For more information, visit rivaltech.com.

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About the author

With 25 years of hands-on consultative insights experience across a variety of industry sectors, Matt is a skilled and seasoned research innovator specializing in developing agile, inter-disciplinary consulting teams and creative, technology accelerated insight solutions for global brands who are determined to win in today's fast-paced marketplace.

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Reach3

Let's start with
a conversation.

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