

Online Insights Community Provider Checklist



1 | First Steps



Anyone in the driver's seat of selecting an insights community partner or evaluating their current provider should recognize the trends of apparent commoditization in technologies, the tradeoffs inherent with legacy providers, and the shift in importance toward specialized skillsets.

Here are the steps you should take as you investigate your options:

1 **Audit current/potential partners on their capabilities and fit with your specific needs.**

Base this audit on your organization's vision for the role of community. While some organizations use communities as a replacement for a large breadth of research, and thus need a broad toolkit, others will have more narrowly defined roles for their community that may be better serviced by a simpler and more cost-effective solution.

2 **Pressure test the tech to make sure it's powerful and flexible.**

Many legacy providers have limited, outdated technology that looks good on the surface but has serious limitations. Can the provider accommodate large sample sizes? Where does it stand on mobile delivery and video applications? Does it embrace 3rd party plugins?

3 **Place high value on support teams and skillsets.**

Clients with knowledgeable, consultative teams and access to applicable peripheral skillsets are getting far more value from their community relationship than those who deal with order-takers and inexperienced, burned-out staff. The quality of the account team makes a world of difference and you should push to meet with the people who would be your day-to-day support team. Ask questions to test the depth of their research knowledge and their ability to mine data across studies.

4 **Use the accompanying checklist to help you in your evaluation.**

Knowing which questions to ask and what to look for is the most difficult part. Use the checklist in the next section to help you evaluate current or potential partners, or as inspiration to ensure your own set of questions is thorough.

Topic Checklist: **Tools & Tech**

Get the basics with ability to go beyond as needed

Area	General Recommendation
Scalability and Flexibility	<ul style="list-style-type: none"><input type="checkbox"/> Community sizes up to several thousand<input type="checkbox"/> Can support pop-up short-term communities of 1-3 months<input type="checkbox"/> Can support multiple community 'rooms' for different member types<input type="checkbox"/> Can support multiple languages natively within community platform
Built in's	<ul style="list-style-type: none"><input type="checkbox"/> Basic research features <i>(surveys, polling, discussions, journals, and chats)</i><input type="checkbox"/> Ability to do longitudinal tracking<input type="checkbox"/> Media hosting and member media upload<input type="checkbox"/> Special question types like heatmaps, video/image upload, and sliding scales<input type="checkbox"/> In-platform activity programming, with self-service option<input type="checkbox"/> Randomization, logic, branching, and quotas within surveys<input type="checkbox"/> Fielding reports and incentive tracking/distribution<input type="checkbox"/> Real-time automated quant and qual reporting, charts, and exports<input type="checkbox"/> All member responses saved to profile for data mining and support team will do mining for you<input type="checkbox"/> User profile management and tagging
Plugins	<ul style="list-style-type: none"><input type="checkbox"/> Advanced third-party tools for unique projects <i>(in-home eye tracking, advanced survey engine, UI/UX tools)</i><input type="checkbox"/> Analysis programs for banners/tabs/nets, MaxDiff, Conjoint, and stat testing<input type="checkbox"/> Exports, such as SPSS that can be ported to external analysis engines<input type="checkbox"/> Advanced question and study types such as timed response, MaxDiff/Conjoint, mobile metering, card sorting, semantic differential, annotation, sentiment analysis, etc.

Topic Checklist: **Support Team Skillsets**

Get to know your team and whether the partner has skillsets you need

Area	General Recommendation
Core Account Teams	<ul style="list-style-type: none"><input type="checkbox"/> Research generalists that can speak to the real-world application of both quantitative and qualitative research<input type="checkbox"/> Knowledge and enthusiasm for a variety of methodologies <i>(Price optimization, in-home usage testing, ethnography, projective techniques, etc.)</i><input type="checkbox"/> Knowledge of weighting, stat testing, bias, and importance of sample sizes<input type="checkbox"/> Experience solving big and interesting challenges across a variety of industries<input type="checkbox"/> Strategy and storytelling deliverables with unique insights, story and visuals, and impactful recommendations<input type="checkbox"/> Examples of data-centric deliverables
Peripheral Skillsets	<ul style="list-style-type: none"><input type="checkbox"/> Industry and topic-level expertise relevant to your scope of work <i>(ex. Consumer banking, UX testing, branding)</i><input type="checkbox"/> Creative resources to assist with print, digital, and media assets to support and spread insights

Topic Checklist: Cost Structure

Get a sense of what you’re really paying for, so you can ensure you’re getting the best value

Area	General Recommendation
Unused Staff Skillsets	<ul style="list-style-type: none"><input type="checkbox"/> The ability to opt out of organic listening if it's not pertinent to your implementation<input type="checkbox"/> Avoid being charged for extended teams of PhD's or experts on your account team that drive the costs up<input type="checkbox"/> Dedicated, lean account teams that are not spread across more than 2-3 total accounts
Right-sized Tech	<ul style="list-style-type: none"><input type="checkbox"/> Innovation roadmaps that free up account team time and consulting power<input type="checkbox"/> Dedication to improving community power, such as data mining and member management<input type="checkbox"/> Partnerships for complex or unique question/study types <i>(vs. building them in and bloating your tech investment)</i><input type="checkbox"/> Flexible cost structures for DIY, lite, normal, and power community usage

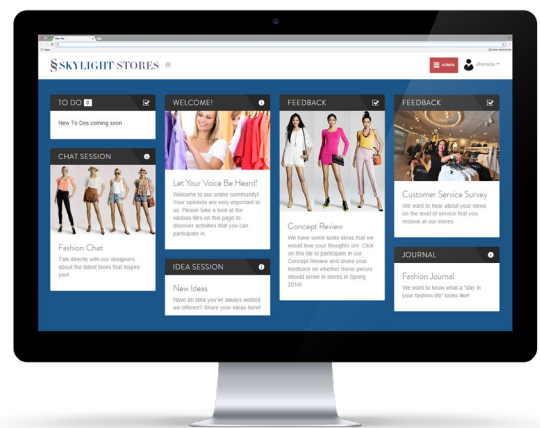
2 | Start the Conversation

Finch Brands is a pioneer in Next Generation Insights Communities through its FinchSight® offering.

FinchSight® Insights Communities

We designed the insights community solution we wished we had when we were on the client side running Fortune 500 brands.

FinchSight is designed to increase your return on insights through a combination of expert research support and cutting-edge technology.



Finch Brands

Finch Brands is a real-world brand consultancy. We exist to help brands win when it matters most.

We achieve this by blending insight, intuition, and creativity to shape brand strategy and drive people to action. Our services span insights, strategy, and design.

Finch Brands was founded in 1998 by pioneering executives instrumental in the ascent of David's Bridal and IKEA. This heritage of blended client-side and agency experience is alive and well today across our team of strategists, researchers, and designers from companies such as Campbell Soup, Unilever, Target, Kimberly-Clark, Urban Outfitters, and more.

For more information
or to start a conversation,
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