

## **The Next Generation of Online Research:**

*A new paradigm that enables better, smarter  
decision making*

by Peter Mackey, VP Research & Business Development

*The marketing team for a large packaged food company is at a crossroads. A critical decision needs to be made quickly about a new strategically important pre-packaged dessert that will be the first of its kind sold through quick-serve restaurants. They need to be in the market before the all-important summer season and they don't have time for traditional research methods that could take weeks or months. Manufacturing needs a decision now so they can gear up for the right packaging. Marketing needs to know what benefits they should focus on in the product's sales efforts to restaurants. And senior management needs internal consensus on the decision before moving ahead...not everyone is in the same camp.*

*Within two weeks, the company has their consensus and is moving ahead confidently with the new product. How did they do it? Instead of following the typical path of a series of focus groups to gather insight and surface hypotheses, followed by a quantitative study to validate the results, it all happens in a single evening, with 200 consumers, product sample in hand, sharing their opinions about the product in a real-time research session. All of the stakeholders hear directly from their customers what works and what doesn't, and most importantly why. This critical decision that will lay a new course for the company is made within minutes at the conclusion of the live session.*

Welcome to the next generation of research. Invoke is an online researching platform that empowers researchers to gather better data more quickly than ever before.

While the first wave of online research focused primarily on replicating traditional research practices, forward-looking researchers are starting to see another opportunity presented through the Invoke platform. Invoke not only allows us to do familiar things better, faster, and cheaper, it also allows us to approach research in an entirely new way.

## **Today's Research Environment**

---

There are several challenges that we as researchers are facing today that are forcing us to think outside the methodological box. First, research organizations are being asked to play a more important role by contributing to their companies' success in more strategic ways. It's no longer sufficient to be providers of data. Rather, researchers are being asked to be a "voice at the table", a valued consul to senior management, and to be a guide on the path to success, by providing a depth of analysis and insight that is far greater in its impact.

Second, in this highly competitive environment in which we exist, every dollar is being scrutinized and marketing expenditures need to prove their worth through a much stricter analysis of ROI. This means that research data as proof of marketing expenditures' value is increasingly at a premium. The results need to be inarguable and not left open to interpretation.

### Online research snapshot

Online research spending in the US grew 20% in 2004 and totaled \$1.18 billion in 2005

(Source: *Inside Research*)

Spending is expected to triple to approximately \$4 billion by 2008

(Source: *Marketing News*)

Third, as consumers become more and more savvy, skeptical, and privacy conscious, it's getting harder and harder to find, reach, and engage participants in research. Without highly qualified participants and a high quality research experience, the value of research would be severely diminished.

And lastly, it's no longer a question of whether the Internet is a viable data collection environment. Now it's not "should I" do my research online, it's "how do I". It's becoming more and more critical to use methods built on Internet best practices, that draw upon the online environment in a way that yields the best quality data, and are not just cookie cutter versions of offline practices.

At Invoke, we recognize and even embrace these challenges. In fact, it is for these reasons that the Invoke platform exists: to increase the value and contributions of research organizations; to provide a better return on investment of marketing expenditures; to provide a high quality environment that participants enjoy being a part of; and to solidify the position of the Internet as the de-facto standard for superior data and insight collection.

## The Invoke Advantage

---

Invoke provides three major advantages over traditional approaches to research: real-time decision making, methodological flexibility and speed.

**Real-time decisions.** A major advantage of the Invoke platform is its real-time analytics. These advanced features are similar to the tools used for business intelligence, but in this case these tools are used not to mine data that was gathered in the past, but to find the significant patterns in data that is being gathered in real time.

The Invoke platform also allows observers to participate in the online research as it unfolds. This provides the opportunity for the relevant stakeholders to learn from the research all at the same time. Rather than waiting for topline, briefings, or reports, a client's executive team, product team, and advertising agency, for example, could all watch the research session together. And with the ability to add questions "on-the-fly", stakeholders can react to the data in real time and, if necessary, even redirect the questions in response to the results.

This changes the research process considerably. Because everyone is focused on the same conversation with the market and everyone shares the insights, Invoke sessions build consensus. In most cases, the Invoke session becomes the decision point for the team conducting the research. Many clients are saving time and making faster, better decisions, using this approach.

**Flexibility.** In traditional research, qualitative information is generally gathered separately from quantitative data. Often these two types of research are also collected by different research teams in the organization. The result can be a lack of coordination between these two complementary types of research.

Invoke combines the two most popular research methods—focus groups and online surveys—into one powerful platform. During one Invoke session, researchers

### Invoke by the numbers

Sessions conducted:

**1402**

Clients that have used Invoke:

**147**

New product ideas tested on Invoke:

**2,204**

Number of participants per session:

**30 - 300**

Time-to-insight for Invoke users:

**1-2 weeks from project start**

Average time to generate reports:

**7 minutes**

### Which industries use Invoke?

The Invoke platform is used in a wide variety of industries, including:

- Consumer packaged goods
- Financial services
- Pharmaceutical
- Technology
- Hospitality and restaurants
- Retail
- New media and entertainment
- Political research

can ask participants practically any question type: prepared quantitative questions, prepared open-ended questions, and impromptu questions—either open ended or closed—that are created on-the-fly during the session based upon the data that surfaces from previously asked questions.

This combination provides a rich mix of information and insights. Because the data is both qualitative and quantitative, you get the whole story, all at once. You can both measure and diagnose with the same audience simultaneously. And because your sample size is large, and can be nationwide, you can be more confident in the results. Invoke routinely gathers data from 50 or 100 respondents at a time, and can handle groups as large as 300. These large sample sizes are much more reliable than other qualitative techniques.

Flexibility is also derived from the fact that the Invoke platform enables the display of virtually any type of digital media to all participants simultaneously at the same quality, regardless of connection speed.

**Speed.** The immediacy of Invoke can make a huge difference when speed to market is critical. With traditional research, it may take weeks or months to execute. You wait for your research results, and you hope that by the time you receive the data it will still be valid. An Invoke session is a live event, so today's decisions can be made based on today's research.

#### *Nestlé Waters Invokes New Advertising Campaign*

Nestlé Waters North America Inc. (NWN) and Media Horizons, Inc. (MHI), one of the company's advertising agencies, were producing a new advertising campaign aimed at increasing the number of inquiries into NWN's Home Delivery call center. Before committing to the costly proposition of creating an advertising campaign, the NWN marketing team wanted to determine which ad (from the seven concepts proposed by MHI) would generate the highest volume of inquiries. And they needed to do so in the timeliest and most cost efficient manner possible.

Enter Invoke. In a series of five Invoke sessions, 437 target consumers across three regions were exposed to the concepts and asked questions about which ad was more effective in motivating them to contact the company for more information. Dynamic questioning and probing identified the primary drivers and limiters to each ads' appeal.

NWN marketing managers, along with the agency, watched the live responses, collaborating and discussing the results. Because of the flexibility and real-time nature of an Invoke session, the team was able to modify the ads on-the-fly to reflect the audience's feedback, and re-insert them back into the session for further evaluation. In doing so, the team emerged with a far stronger winning concept that had been validated with the same audience.

The flexibility of the Invoke methodology with its true blend of quantitative and qualitative insight allowed NWN to considerably shorten the research timeframe (since another round of testing was not needed) and significantly improved the team's confidence in the final ads chosen. The NWN team left the sessions confident that they had selected the best concept to meet their advertising and business objectives and the agency had very specific, reliable consumer insight into how to further optimize the campaign.

"The ability to take consumer feedback and react in real time to get further input from those same consumers during the same session is an awesome benefit of this innovative research platform. This enabled us to save time and money on refining our advertisement." —Jennifer Salera, Nestlé Waters

## Working With Invoke

Invoke is refreshingly different from other research platforms. In partnership with leading research providers, Invoke has enabled world-class research methodologies and best practices to be combined with the best of interactive Internet technology.

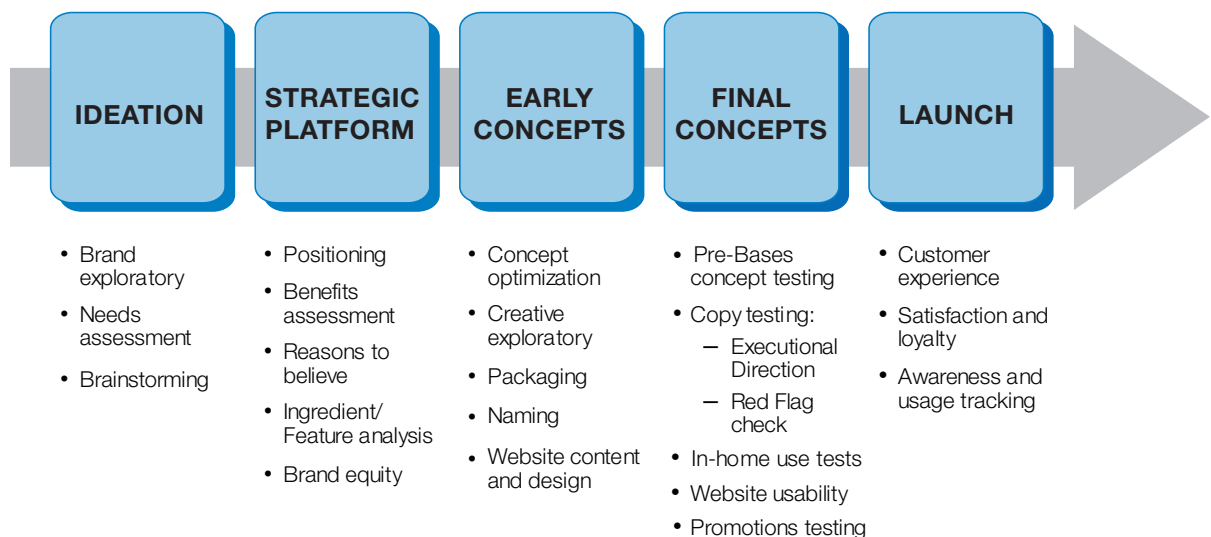
Our research partners and Invoke's own professional services team provide a research solution to meet each client's unique needs. Research experts translate customers' business and research goals into an Invoke-specific research plan, and provide hands-on support during the session.

An Invoke session is a live event that is moderated by an Invoke-certified professional. Moderators are deeply familiar with the Invoke platform and its use, and are also trained facilitators, skilled at helping teams reach a consensus.

In an Invoke session, the moderator plays the role of the master of ceremonies, guiding the event. While the research participants are answering questions in real time, the moderator supports the stakeholder team observing the event. The moderator surfaces key data points, raises assumptions, and leads a discussion about the ramifications of what is being learned. Based on the research plan that has been agreed to with the customer, the moderator then guides the group toward a decision.

## Insight Throughout the Innovation Lifecycle

The flexibility of the Invoke researching platform allows it to be used across the entire innovation cycle, from early exploratory to in-market performance measurement. Successful examples of its application can be found in more qualitative applications such as needs assessment and brand equity studies to product and concept development and communications and copy testing. Recently, marketers have found the Invoke platform to be a particularly useful tool in conducting in-home use tests where it is important to engage respondents while they are in the moment of experiencing the product.



## Gathering Better Data

---

### Qualitative research on Invoke

- Sample size: 30-300
- Average of 55 mins of feedback per participant (for 1 hour session)
- Each participant answers every question
- Anonymity = greater honesty
- On-the-fly probing avoids false trails
- Participant voting identifies outliers
- No dominant personalities
- No groupthink
- Live chat with individuals
- Multiple segments in one session
- Transcripts instantly available

Qualitative research has always been valued because of its ability to shed light on the human element of an issue. Qualitative researchers seek to learn why people think, feel, and behave the way they do by gathering their stories. It's a powerful and useful form of research, but until now, there have been serious limitations: very small sample sizes and the risk of dominant personalities and false trails.

Invoke overcomes these long-standing constraints. First, the Invoke platform makes it possible, finally, to capture—and analyze—large amounts of qualitative data directly in relation to its quantitative counterpart. No longer must qualitative data be consigned to a subordinate role, or considered anecdotal. With Invoke, qualitative and quantitative data are finally equal partners. Looking at both sides of the coin—facts and feelings—lets you uncover the whole truth about your products and services and how they are perceived by the market.

Second, the Invoke platform eliminates dominant personalities and false trails by providing the same opportunity to answer a question to everyone at the same time. And through its unique voting feature, which allows participants to agree or disagree with the thoughts and opinions of others (only after they have shared their own opinion), qualitative results can be analyzed in real time to assess whether a particular opinion is shared by others or in fact is an outlier that can be immediately discounted. Imagine being able to do that in a traditional focus group environment!

## Invoke Participants Tell You More

---

### Who are Invoke participants?

Invoke conducts research for all kinds of customers. Working with our certified panel providers, we can tap virtually any population.

Examples of Invoke participants from current and past projects include:

- Doctors / medical professionals
- IT professionals
- Teens and parents of teens
- Hispanics and other minorities
- Small business owners
- Medical sufferers
- Primary grocery shoppers
- High income / affluent consumers
- B2B decision makers / executives
- Retired / senior citizens

Invoke participants are more forthcoming with their opinions than survey respondents, and provide their opinions in more detail, with more useful context. That's the finding of a side-by-side comparison of an Invoke session and a survey-based research project using exactly the same content. In both cases, the research content was a mix of survey questions and open-ended questions. No probing was done during the Invoke session, to allow a fair test of the two methods. As an additional precaution, the analysis was done "blind" (without any knowledge of which data points came from which study).

The study results showed that the quantitative data provided by the two populations was very, very similar, but better qualitative results were provided by the Invoke respondents.

Invoke participants provided richer verbatim responses than their survey-taking counterparts, using 15% more words and ideas than found in a traditional survey. Invoke participants also provided more of a big-picture perspective on the issues they were asked to comment on. For example, they were four times more likely to personalize their responses in terms that reflected their life and values. Invoke participants were also 50% more likely to share emotional content in their verbatim responses.

### What Invoke participants say

"This was a very pleasant experience. I was involved the whole time and was able to focus easily as it was presented in a very positive and professional manner. Thank you"

"It was very enjoyable, I loved seeing everyones responses!"

The reason for this openness among Invoke participants is that they truly are engaged in the discussion with the moderator, while they also know that it is anonymous and that their voice is equal to that of every other participant. In fact, 97% of Invoke participants say that they would "Very Much" like to participate in another Invoke session. 87% find the experience highly satisfying. And importantly, the completion rate of an Invoke study is over 95%. Why should you care? A more engaged and involved participant results in better, more insightful data, increasing the power and potential of your research.

## Conclusion

---

Invoke has created an entirely new paradigm for collecting and analyzing data. Our focus on enabling live, action-oriented research events has resulted in a new tool that combines research best practices and the latest interactive technology into one powerful platform.

Forward-thinking researchers not satisfied with the status quo are using Invoke to make a difference in their organizations. As research organizations tap the power of Invoke to gather data on a real-time basis, they have the opportunity to provide more guidance to top management than ever before. Invoke empowers researchers to take the pulse of the market quickly and conveniently, and with a new transparency. The result is faster, better decision-making and a greatly improved ability to reach organizational consensus.

## About The Author

---



Peter is Vice President of Research at Invoke Solutions. He has over 25 years of experience in marketing and research. In senior management positions at J. Walter Thompson and Foote Cone & Belding, Peter solved customer centric issues for major marketers such as Eastman Kodak, Sprint, Warner Lambert, Hewlett-Packard, and IBM. Prior to joining Invoke Solutions, Peter was Managing Director of Greenfield Consulting Group, where he worked with clients on customer loyalty, new product development, customer segmentation, and e-commerce research projects. Peter has a degree in Political Economics from the University of California at Berkeley.