



8 Conversational Research Principles

**That Reveal What People
Actually Think, Feel And Do**



Reach3

RIVAL

RIVAL GROUP COMPANIES

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Introduction

To help companies get better insights faster than before, Reach3 and Rival Technologies have laid out eight foundational principles of conversational research design. These principles have enabled brands spanning various sectors and global regions to cultivate closer connections with their customers during times of unpredictable, unprecedented and unyielding change. We are thrilled to share these principles with you along with concrete examples of their application from some of the largest brands in the world.

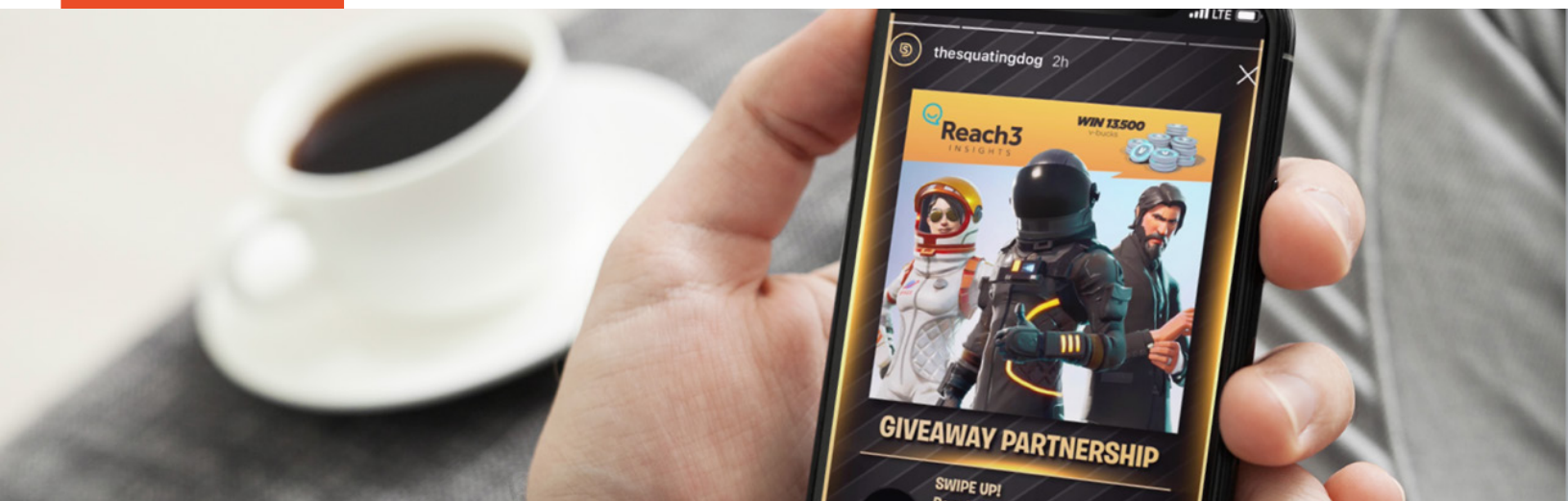
4 reasons why you should read this e-book

Easy to apply and adopt: Amid a world of unpredictable consumer shifts, this ebook equips researchers with innovative methodologies can be applied immediately without major changes to your strategy and roadmap.

Navigate the new norm: As an industry, insights and research have been slow to adapt to the significant changes in the way people share their ideas and opinions—especially with brands. These principles will help researchers engage with consumers more effectively, craft activities that are more relevant and authentic, and forge relationships that foster a sense of trust and authenticity.

Cultivate deeper connections: While insights that lead to better business decisions are the ultimate objective of our industry, we must not lose sight of how our approach to research impacts customer relationships. Conversational Research helps develop customer loyalty, trust and a willingness to share more over time.

Unlock future potential: The combo of mobile tech and conversational research design delivers better insights and deeper customer connections. By adopting the principles of conversational research, you are future-proofing your role as the conduit for high-quality, customer-validated insights.



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—hoping that, maybe this time, they’ll capture fresh new insights. By conducting a long, arduous email survey on pay-to-play access panels—panels with a predictable pool of professional test-takers—researchers fail to reach consumers whose perspectives are often overlooked.

Real-world application: Recruiting underrepresented voices on social media

The highly coveted gaming demographic—a younger cohort of digital natives—is largely allergic to consumer research panels and traditional email surveys. 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.

Leveraging the influencer's nearly 200,000 followers, we intercepted gamers with a conversational survey within Instagram.

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.



900
interviews

in less than
12 hours

Takeaway:

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.



2 Be Present

Engage with people in the moment you want to understand not days or even week later.

Conventional research is heavily reliant on recall. Most research feels more like a test than a meaningful, relevant and timely engagement. Participants shift from system 1 thinking to system 2 thinking, and as a result the responses become more considered and over architected.

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 the behavior is still fresh.

Real world application: Ethnography in the new normal

For the iconic brand Jägermeister, much of their brand identity was dominated by (and largely limited to) a drink known as the Jager-bomb – a high-octane shot loved by night-clubbers and partiers.

Determined to expand their brand, Jäger wanted to explore new positioning and possibilities for their brandz.

Using our conversational approach and the Rival platform, we assumed the role of quantitative ethnographers, engaging legal age drinkers in a variety of contexts. Taking a mobile-first approach allowed us to be present during key moments without being in their personal space.

We surveyed a mix of Millennials, Baby Boomers 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.

By the end of our engagement, Jägermeister was able to identify several new brand positionings that resonated strongly with a variety of demographic groups, bring several new Jäger products to market, and introduce new contemporary packaging too.



Takeaway: Capturing in-the-moment feedback does not require in-person activities.

In the past, an ethnographer might have gone into somebody's home, spending hours watching a family as they made dinner, served drinks and did they dishes. It's the best way to get a handle on authentic consumer behavior—but also very expensive and labor intrusive. With conversational research and the Rival platform, you can use photos and videos to do much the same thing—uncovering rich insights on the emotional and contextual drivers of consumer behavior, but at a far greater scale.



3 Engage

Get consumers out of “test-taking” mode.

Low engagement is a direct result of emailing consumers anonymous, long, time-consuming surveys after the fact. They’re not fun, they’re not personalized, and they don’t reflect the brand tone. As a result, response rates for conventional surveys are abysmal. Completions rates are shockingly low and confidence in the data and responses is equally poor.

Research should feel like a relevant, personalized engagement, not a test. It is critical to get people out of test-taking mode. When we engage people using a conversational style, we can capture deeper, richer and more authentic human insights.

Real world application: Iterative ongoing activates that reflect who consumers prefer to communicate via chat and SMS.

A global consumer health company had been doing traditional research with young mothers—on a 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 that asked mothers to recall why they were buying certain products and not others. Despite repeated attempts, the company said they were no further along in understanding the true reason behind the sales decline.

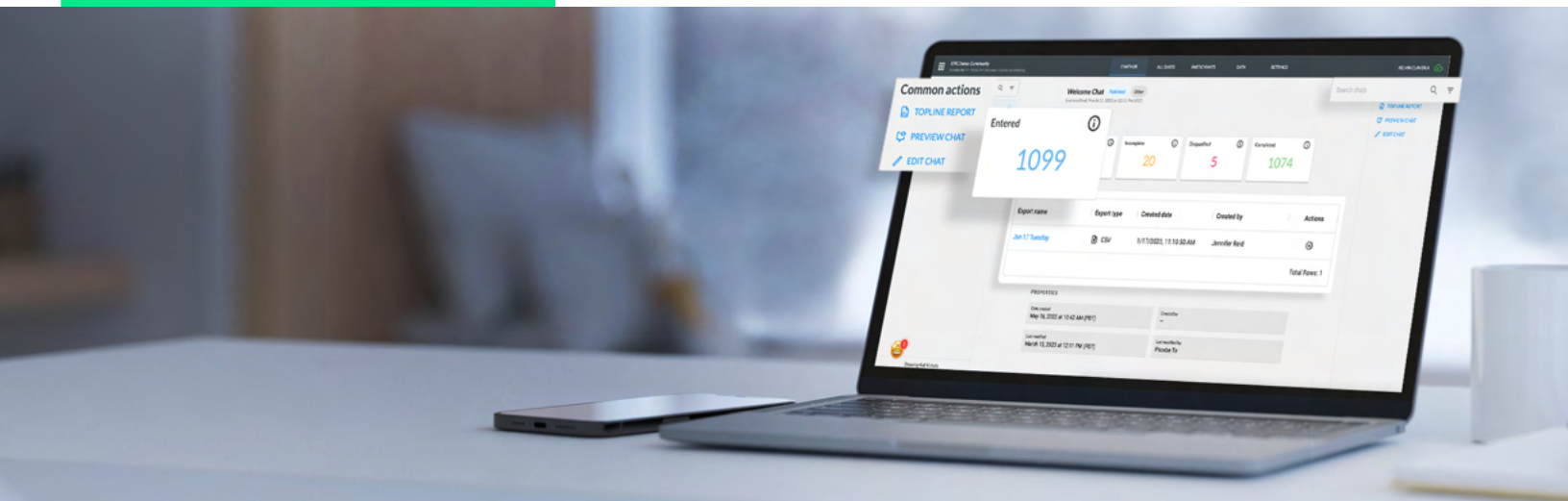
Ready to rethink their research, the company worked with us to engage young mothers on their mobile using SMS and conversational surveys. We engaged hundreds of these mothers in the moment—for a few minutes at a time—and used selfie-videos and instant-messaging-based conversational techniques to build 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.

Takeaway: Connect with consumers on the channels they're already using.

Get consumers out of test-taking mode by engaging them on the device of their choosing. Just as in any relationship, the more engaging, immersive and organic ways of communicating, the more meaningful and authentic the conversation will be. The medium, as it's told, is the message, so engage people in a conversational style—via the modern communications channels they use with friends and family members—and capture deeper, richer and more authentic insights that drive better business outcomes.



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. 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 activities.

Real world application: Overcoming fragmented attention compounded by email overload

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% of people read an SMS message within the first three minutes of it being sent; 95% of text messages are read immediately. Compare that to studies that show that over 50% of email—still, by far, the most popular method of deploying surveys around the

world—are deleted without ever being read.

Real world application: Migrating from email to chat-based engagements with almost no disruption

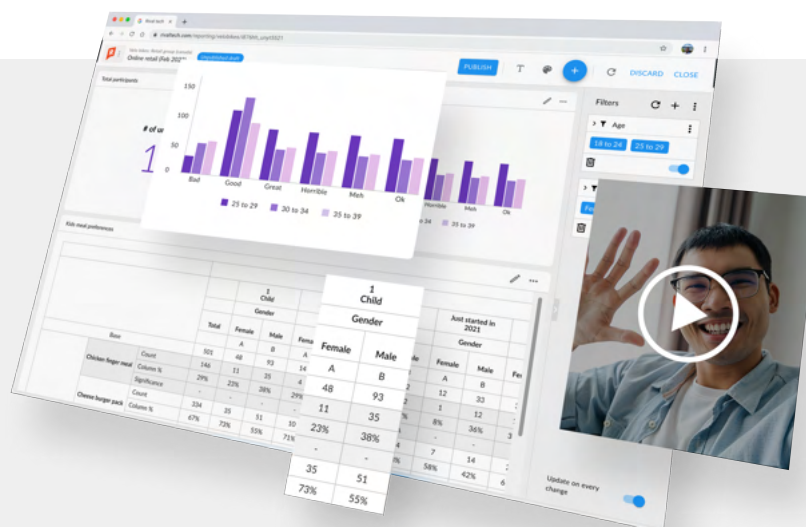
Brunswick (the largest maker of pleasure boats) has enjoyed booming success in the last few years. These new boaters didn't meet their conventional customer profiles. Brunswick recognized that new customers had new needs and expectations that had to be met if they were to become lifetime customers.

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 SMS 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.

As the community rapidly evolved, Brunswick looked to the team at Rival to optimize the recruitment and screening process. Now, using APIs, whenever a new customer or enthusiasts opts in to receive marketing material from Brunswick, we integrate with their CRM and automate the double opt-in process, screener and welcome chat. A process that has eliminated hundreds of hours of slow and repetitive administrative effort for the team at Brunswick.

Takeaway: Move fast, give participant options and make it easy

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.



5 Go Deep

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

When it comes to genuine consumer understanding the big promise of big data has been a big letdown. Insights can be gleaned from the transactional data left in the wake of daily living but all too often it lacks context and the intimacy of a human voice.

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.

Real world application: Using video to amplify the impact of hardcore quant in one learning stream

Tyson Foods (the multinational company behind Hillshire Farm, Sara Lee and Bosco's) that explored how morning routines were changing and evolving. More importantly as the daily grind switched gears, they wanted to know which behaviors were going to stick and what was going to happen next.

Tyson could see the change happening in its sales numbers 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.

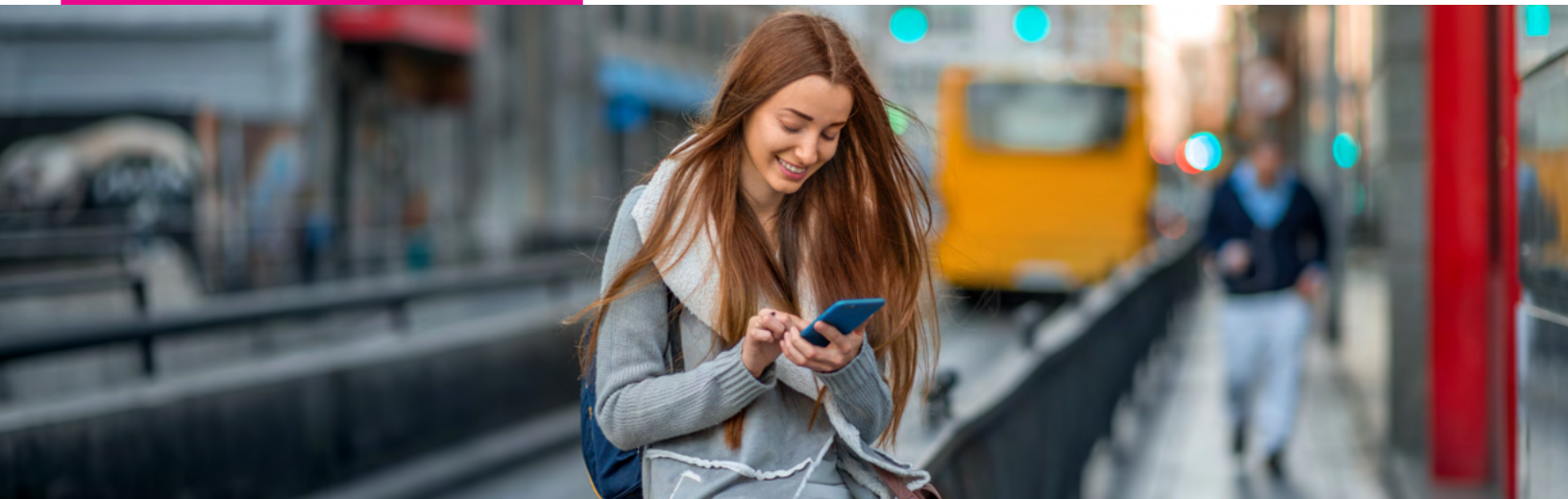


Using video selfies, Tyson consumers would talk to us while they prepared breakfast for their family. They'd flip their cameras and show us what they were preparing. We could see the context of their decision-making and the meal-prep process: Who was in the room? What was in the fridge? What did the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

Takeaway: Multiple sources complemented by video are the most impactful at driving change

Understanding context, attitudes and behaviors in one research touchpoint is a key benefit of conversational research design. The end result? A more holistic view of why behaviors are happening—and, more importantly, where the market is headed.



6 Continue the Dialogue

Re-engage to drive ongoing, iterative learning.

Smart marketers realize the importance of moving beyond the “transactional” and building meaningful, long-lasting relationships with consumers by connecting at multiple touch points overtime in a way that feels friendly and familiar. It’s a cue more market researchers are starting to follow. Consumers today prefer asynchronous, ongoing and iterative engagements that transpire overtime. In the age of mobile messaging and mobile messaging-based notifications, it is easier than ever to do just that.

Real world application: Breaking down research into chat-sized chunks boosts engagement

Global automobile company Hyundai was testing a new service, called BotRide, that combined ondemand 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.

Rather than running one large study at the end of the program, they

NO. 6: CONTINUE THE DIALOGUE

adopted a more iterative approach—using SMS to connect at key moments 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, they re-engaged with these same consumers during their rides. Using QR codes located on the back seat of BotRide vehicles. At the end of the pilot, they easily re-engaged with riders for in-depth live interviews (via video) to further explore their BotRide experience.

Takeaway: Break long surveys into shorter iterative engagements to get better feedback

In this new world where consumers are just a mobile notification away, it is not necessary to send one super long survey. It has been shown that short engagements in quick succession can lead to more thoughtful and authentic responses. By breaking up surveys into shorter interactions that feel more texting, question becomes and an opportunity to build upon your learnings, advance the conversation and create a more authentic connection over time.



7 Represent Yourself Well

Elevate your brand through the participant experience.

Companies spend hundreds of millions building their brand, obsessing over loyalty, and prioritizing the customer experience at every touchpoint except research. As a result, research experience can feel disconnected from the brand and in many instances, it can reinforce a negative perception. The irony is that research is one of the most intimate brand encounters you can have. Leveraging a modern, in-the-moment approach to research is key to not only uncovering deep, rich insights, it can also contribute to a positive brand perception but also amplifying the brand experience.

Real world application: Leveraging the power of your brand to get better insights

Media & TV:

REVOLT TV, Sean “Diddy” Combs’ premium cable network, launched their first-ever REVOLT Summit in Atlanta: a multi-day event to celebrate the power of hip-hop and its cultural impact.

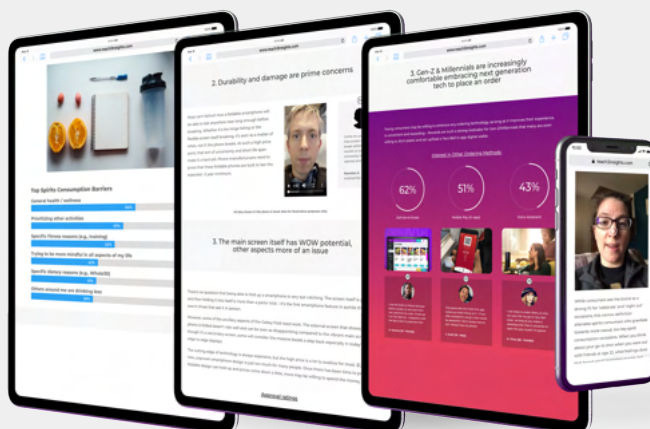
Using Rival's mobile first technology, we were able to create six conversational surveys throughout the REVOLT Summit—capturing both qualitative and quantitative feedback. To maximize engagement the conversational chats reflected REVOLT's fun vibe and brand personality. The net positive for REVOLT was clear: 89% of attendees said they had a very positive reaction to the Summit, while 98% said they'd likely attend again.

Afterward, Lynzie Riebling, 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.



Takeaway: Think of research as an opportunity to build trust affinity and loyalty

Customers crave meaningful brand engagements. They want to feel like their feedback is being heard and they expect every touchpoint to look, feel, and sound like the brands they know and love. The old-school idea that surveys must be cold, and clinical is no longer the best approach. By representing your brand's tone and voice in your research, you'll boost interest and engagement because participants feel like they are connecting with the brand directly rather than an anonymous third-party for whom they share no affinity.



8 Tell Compelling Stories

Activate your insights through innovative mobile & video deliverables.

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.

Real world application: Evolving from observe and report to making strategic recommendations

Kimberly-Clark needed 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. They 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.

Five essential rules for effective storytelling

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

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.

20%
sales increase

within the first
6 months

Key takeaway: Move beyond dashboards and PowerPoint—put your customers front and center.

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.

Conclusion

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 into the mobile context.

This book outlines the 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. And then be able to take those learnings and translate them from data to insights and ultimately action.

Researchers need to reimagine the overall experience. Look for innovative new tools and explore new approaches and methods. While the need for change is urgent, the reality is the shift will be a slow evolution. A gradual adoption, not a radical transformation. Recognizing that things must change is of course the first step.



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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Let's start with a conversation.

Maximize your agility, budget and impact on a community platform that delivers quant capabilities, self-guided qual studies, and video. All of this with the ongoing support of the best customer success team in market research.

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