INSIGHT COMMUNITIES

PRACTICAL USE CASES FOR THE

CUSTOMER-CENTRIC ORGANIZATION

Part of InSites Consulting

gongos | WE MAKE CUSTOMER CENTRICITY HAPPEN

If your organization is on a journey to becoming more customer-centric, then it might be time to reflect on the partnerships and tools your organization is using to gain the greatest ROI on that effort. So many of the customer programs developed today focus on "listening," or fall into the rut of "ask/answer" insight generation. However, this strategy often misses out on the important nuance of your customers' daily lives, leaving internal stakeholders with disjointed views of their customer. The great news is, many organizations already have the resources available to achieve deeper customer centricity, and just need a shift in perspective on how to empower their teams to take advantage of this possibility.

Insight communities provide teams with opportunities for meaningful connection, where stakeholders can:

- Connect with customers on a holistic level

- Develop intuition and anticipation of customer wants and needs

- Become better stewards (or even active advocates) for the customer

- Seek the customer perspective with enthusiasm

In this guide, get inspired with ways you can take a personalized approach towards integrating insight communities in your stakeholders' day-to-day.

A NEW DIRECTIVE:

Engage Customers as Stakeholders

Nearly 20 years ago, when insight communities entered the market researcher's toolbox, they were built on a promise of enabling teams to get closer to their customers, to establish a direct dialogue that fosters longitudinal insights. And while many organizations saw that take hold within their teams, even more found their insight community wasn't quite delivering on this promise. Where did things go wrong?

Many times, the way communities are deployed set them up to fall short of this vision from the start – where internal stakeholders are removed from the insight generation process, and customers aren't fully committed to the mission.

THE COMMON PITFALL

End stakeholders rarely engage directly with customers once a community is up and running.

CUSTOMER ⇄ YOUR COMMUNITY PARTNER

↑   ↓

YOUR INSIGHTS TEAM

↑   ↓
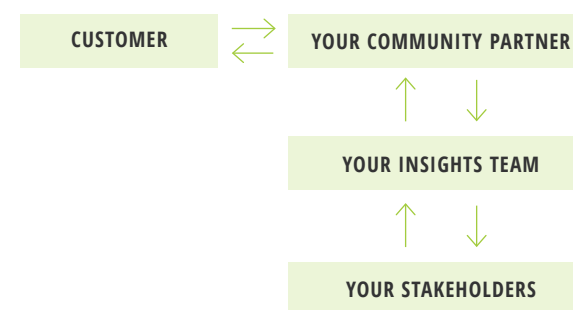
YOUR STAKEHOLDERS

AN EVOLVED PHILOSOPHY: CUSTOMER AS A STAKEHOLDER

Direct channels for research and customer empathy are established, building deeper connections between customers and stakeholders.

CUSTOMER

YOUR COMMUNITY PARTNER

YOUR INSIGHTS TEAM & STAKEHOLDER
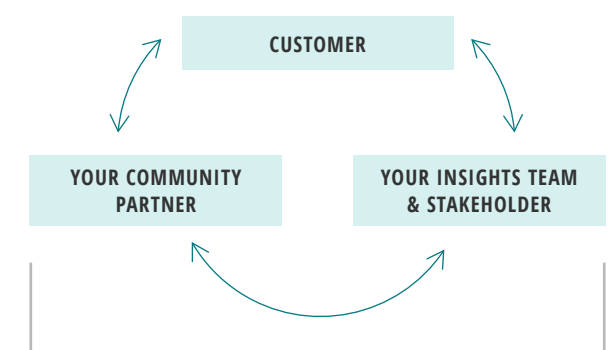
Realigning on the goals and strategies a community can support creates more opportunities for meaningful impact where customer understanding can shape strategy – and the customers are committed to the success of your brand.

EXAMPLES OF KEY MINDSET SHIFTS TO SUPPORT ENGAGING CUSTOMERS AS STAKEHOLDERS:

FROM

Reactive and tactical

Validate my thinking

Conveniently access my sample

Share as little as possible

↓

TO

Purposeful and strategic

Empathize and collaborate

Get to know my customer as a person

Give enough background to make responses impactful

Making this mindset shift doesn't mean validation and tactical insights aren't necessary. It does, however, change the way stakeholders view the tool and how it can enable them to be better stewards of the customer perspective. This requires more than a simple commitment to ensure this takes hold. You must carefully construct the customer experience to serve as a meaningful touchpoint, tap into this simple framework to guide planning:

VISION
Establish the vision for the desired customer experience and use it to craft the engagement approach, including outcomes and strategies to achieve it.

ONBOARD
Build avenues for onboarding goals of their participation, and establish familiarity with moderators, stakeholders, and each other.

CONNECT
Create engagement strategies beyond the research that support building a true community feel among customers.

EVOLVE
Continually evolve strategies throughout the community life-cycle to create excitement and interest to maintain involvement.

PRO TIP
Build engagement and incentive strategies that push beyond monetary, giving customers a greater purpose for participating in the community, and building relationships with other community members. Explore our **community engagement playbook** for inspiration.

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FLIPPING THE SCRIPT:

Engage Stakeholders as Customers

For the community to enable your insights team to be a true source of competitive advantage, stakeholders need to be as invested in ROI as the insights team. Bring stakeholders along on the journey to support making the case for investment, building out use cases, and generating excitement among the team. Engaging stakeholders is not a simple point-in-time effort. Rather, it requires focused dedication of the insights team to prioritize relationship building and business application skill-sets that build bridges with the end audiences.

Similarly, to the customer experience, spend focused time building the stakeholder experience, customized by an individual or team to ensure it is impactful.

VISION	ONBOARD	CONNECT	EVOLVE
Involve stakeholders from the onset, exploring use cases, learnings from the past, and defining success for the future.	Train stakeholders to ensure they gain the greatest value from the engagement and offer opportunities to experience the value first-hand.	Spend time immersing in customer perspectives and create opportunities to directly interact with customers.	Revisit vision and use cases to broaden perspectives and ensure the community pivots along with business needs.

TRAINING INSPIRATION TO ENSURE YOU MAKE THE MOST OF YOUR COMMUNITY INVESTMENT:

- Unbiased customer interaction
- Human-centered design *(explore our in-house program **here**)*
- Influencing skill development

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To ensure the community's impact is optimized, determine the internal audiences who can benefit from the community, and map out the desired engagement from each. Use this to establish a communication plan that ensures these individuals are brought along on the journey and experience the benefits.

POTENTIAL COMMUNICATION AVENUES INCLUDE:

Cross-Share Among a Champions Group:

Bring stakeholders from various brands together to share use cases, strategies, and learnings across brands to build the collective knowledge and impact of the community.

Quarterly Newsletters:

Share themes and learnings across the collective communities to spark new ideas and demonstrate the continued ROI.

Monthly Reporting:

Support stakeholders internalizing insights by offering report presentations on a monthly (or quarterly) basis, highlighting key insights and recommendations.

Encourage Direct Access:

From logging into the community site and observing responses, to setting up channels for 1-1 stakeholder to customer conversation, encourage a hands-on approach to the community.

With an aligned team and vision for the community, build an execution strategy collaboratively with the stakeholders by linking broader organizational goals, business challenges, and team knowledge gaps with research objectives to explore and inspire.

PRO TIP

Stakeholder interviews and alignment workshops support an understanding of goals and envisioned use, while mapping out success metrics for the team. Key topics to explore include defining the community vision, articulating success metrics, and documenting goals.

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TEAM-SPECIFIC: Community Use Cases & Stories to Inspire

Organizations often think of insight communities as a hub of research that can serve multiple teams and stakeholders. And while this is a valuable use case, opportunity exists to leverage communities in a more intimate fashion to support specific team goals. Leveraging team-specific communities enables each community to form a unique identity within the organization. Additionally, it provides unique engagement experiences that best support the type of learnings necessary to fuel more effective customer understanding.

Explore how three key teams can leverage the Customer as a Stakeholder insight community model as a strategic tool for customer-centered strategies.
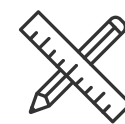
BRAND STRATEGY

INNOVATION & PRODUCT DEVELOPMENT

CUSTOMER EXPERIENCE

BRAND STRATEGY

Having a brand that is relevant and differentiated in the market is essential to future success. And one of the keys to doing so is through establishing relationships with customers that extend beyond the functional benefits of your offer to connect on a deeper emotional level. Whether maintaining or revitalizing your brand positioning, staying connected with your customer and how competitors impact your relationship presents opportunities for an insight community to play a strategic role for the brand strategy team.

To make the most out of a brand strategy focused community, leverage a framework for learning that supports a customer-centric brand strategy, such as the Customer-Based Brand Equity Framework.

Push beyond brand equity connections through additional use case inspirations to jump-start your team's learning plan development:

UNDERSTAND
emotional connections with your customers, and the goals your brand enables customers to achieve

TRACK
competitor engagement, communication, and resonance to help maintain your competitive edge

IDENTIFY
brand stories to establish deeper creative inspiration for brand activation

COLLABORATE
and explore brand positioning, value proposition, and benefits

CUSTOMER-BASED BRAND EQUITY (CBBE) FRAMEWORK
The four dimensions of brand equity.

BRAND IDENTITY
Who are you as a brand?

TARGET AUDIENCE BASED GOAL

Deep, broad brand awareness

PERCEPTIONS & SENTIMENTS

→ Do I know you? In what context?

→ What do you offer?

→ How often do I think about you?

BRAND RESPONSE
What about you as a brand?

TARGET AUDIENCE BASED GOAL

Positive, accessible, judgments

PERCEPTIONS & SENTIMENTS

→ What do I think or feel about you?

→ Are you high quality? Credible? Superior to competitors? Can you be trusted?

→ Do you provide me a sense of exceptional experiences? Connection?

BRAND MEANING
What are you as a brand?

TARGET AUDIENCE BASED GOAL

Strong, favorable, unique brand associations

PERCEPTIONS & SENTIMENTS

→ Where are you available? At what price?

→ What images, associations, and experiences do you portray?

BRAND RELATIONSHIP
What about **you and me**?

TARGET AUDIENCE BASED GOAL

Intense, active relationship

PERCEPTIONS & SENTIMENTS

→ What kind of connection would I like to have with you?

A) I try and use the brand's products and services.

B) I exhibit loyalty, persistence, and love for the brand.

C) I tell others about it and share experiences through my community.

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COMMUNICATION & MARKETING ASSETS CO-CREATION AND PRE-LAUNCH OPTIMIZATION

Increase the creativity of feedback to push past ask/answer approaches by leveraging activities that offer direct engagement between customers and internal stakeholders. Activity types that support this include:

Projective Techniques

Rather than directly asking how customers view your brand (or competitive brands), explore activities that spark creativity while providing deep insight. Example activities include brand personification, party of brands, mad-libs, or word associations.

Immersive Experiences

Explore ways to immerse and observe customers, even when technology is part of the equation. Build avenues for always-on communication to explore brand relevance and communication effectiveness. Get inspired by parallel industry insights.

Co-Creation Exercises

Broaden the team's perspective by co-creating with customers, offering real-time understanding, empathy building, and idea generation that drives deeper insight and true customer-minded action.

IS YOUR BRAND HELPING YOUR CUSTOMER ACHIEVE THEIR GOALS?

Even if your brand has a well-articulated value proposition, you could be missing out on meaningful growth if you haven't taken the step of laddering up your customers' goals and prioritizing strategies that drive future loyalty. Get inspired by brands that have built a value exchange with their customers through our **Best-In-Class Brand** insights.

A STORY TO INSPIRE:

A major health insurance brand sought to establish a direct-to-customer channel, shifting from its legacy B2B model. Without any customer brand awareness, and little knowledge around how to resonate, the organization established an insight community of target customers to immerse, inspire, and build a value proposition and assets to shape its launch.

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INNOVATION & PRODUCT DEVELOPMENT

With markets evolving at an increasingly rapid pace, innovation teams need to keep up. This environment can often mean that traditional consumer research gets left behind, trading market launch timelines for customer-centered insights. And while human-centered design is not new, organizations often miss the opportunity to engage and re-engage with customers throughout their innovation process. Re-imagining the role of an insight community from go/no-go concept testing solutions to support the entire innovation pipeline can expand its impact and reveal new paths for growth.

Structure the community to align with internal stage gate processes, integrate into sprints, or support along the entire human-centered design process. For inspiration on ways to tap into a research community for innovation needs across the innovation life-cycle, consider:

Empathize & define
- Empathy-building
- Market assessments
- Unmet need and pain point identification
- Trend spotting exploration

Ideate
- Ideation and co-creation
- Idea prioritization

Prototype & test
- Concept development, reactions, and refinement
- Prototype and usability testing

Launch & refine
- Launch strategy development
- Post-launch feedback

To make the most of an innovation-oriented community, ensure expectations are clearly set with stakeholders and consumers, as the rapid nature of insight generation and decision making is key to community impact. Structure learning needs to allow for both deep and agile research, including:

Deep Learnings

Develop proactive real-time insight opportunities through missions, diaries, photo-sharing exercises, or video immersions that allow for observational insights and enable the team to ladder up needs, pain points, or Jobs-To-Be-Done.

Agile Approaches

Structure community sprint programs to align customer learning needs with stakeholder collaboration opportunities to provide insights in days rather than weeks. Establishing a set of pre-determined sprint programs enables simple frameworks to be developed, accelerate progress.

Co-Creation Exercises

From challenge groups to live sessions including internal stakeholders, communities provide access to engage customers in solution development, iteration, and optimization.

A STORY TO INSPIRE:

While a nearly $20 billion global industry, chewing gum had lost its edge with the entry of alternative satisfiers. Our client sought to reverse this trend with a focus on one of its nostalgic brands. Engaging moms and their children in community activities allowed us to explore the importance of "fun" and "giving" in the category. Moms participated in targeted co-creation groups to uncover ways to make the brand highly relevant to them and their children's life. This CPG giant launched new products as a result and saw an increase in sugar-free gum sales by 3.3%.

Human-centered, not human-only. Ensure the community doesn't drive the team to analysis paralysis on the customer perspective. While essential to innovation, taking into account the broader landscape of the market and business is equally as important to ensure success. Leverage frameworks, such as a Business Model Canvas and **Strategic Growth Territory**, to translate the customer and market opportunity and ensure the full context of the opportunity is understood.

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CUSTOMER EXPERIENCE

The customer experience team is often supported by a large-scale listening program, gathering touchpoint feedback to identify pain points or frictions along the journey. This inner loop framework ofthinking enables tweaks to the processes and can intercept when things go wrong, but misses out on larger-scale outer loop shifts that are necessary for transformational change. The customer experience is essential to align with brand strategy, re-enforcing a customer's decision to engage with your brand. And having a bad experience can be detrimental to loyalty.

An insight community can support the customer experience team in diagnosing motivations and deep insights around the customer journey, current touchpoint experiences, or fuel broader experience design strategy through an agile approach.

Ways organizations are leveraging insight communities as a competitive advantage for their Customer Experience efforts include:

GAINING	**GATHER**	**EXPLORE**	**INFORM**
bigger picture empathy and understanding of the customer journey, needs, and Jobs-To-Be-Done along the way	qualitative insights that further diagnose results of touchpoint-specific feedback from the listening program, inspiring broader solutions	and validate new experience strategies, determining impact on the experience and implications relative to the broader customer journey	go-to-market strategies and communications for new experience elements

Similar to innovation-oriented communities, agility is key for customer experience communities to be impactful. Similar strategies including sprints, co-creation, and rapid iteration are recommended. Given the cross-functional nature of customer experience efforts, the key to driving true transformation in customer experience communities is the alignment between the broader organization and the outcomes.

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Level-up the communication avenues to ensure strategies are realistic and impactful, reaching executive impact to drive:

EMPATHIC LEARNING

Ensure executives are on board with experience transformation initiatives by allowing the customer perspective to shine through. A few ideas to inspire learning include:

VIDEO STORIES
Weaving insights and customer quotes into a single narrative to support recommendations, driving deep empathy, and engagement among stakeholders.

IMMERSIVE EXPERIENCES
From mock-exercises to demonstrate the experience to real-time "mystery shopping" activities, helping stakeholders experience the need or pain point first-hand.

EXECUTIVE PRESENTATIONS
Amped up stories leveraging a purposeful blend of constructs and talking points to prep the team for executive delivery.

CROSS-FUNCTIONAL ALIGNMENT

When experiences flow across internal departments, generating alignment is key for employees to understand how they fit in and where they need to evolve their strategies. Potential alignment opportunities include:

JOURNEY MAPPING
Establishing a unified view of the customer journey, layering in the employee role, generating consistency, and alignment while articulating opportunities to improve.

CX PLAYBOOK
Curating insights across learnings to develop a guide for stakeholder groups on best-practices for optimizing the customer experience.

INSIGHT ACTIVATION

Ensure activation is top-of-mind and part of the process from the start. Ways to promote strong stakeholder engagement combined with purposeful collaboration include:

ACTIVATION WORKSHOP
Reflect on insights and brainstorm solutions to develop an experience design roadmap. Level-up these sessions with sketch artists, external experts, or even customer representatives to enhance the team's idea generation.

ACTIVATION ROADMAP
Ensure ideas from the activation workshop are implemented through an aligned roadmap, detailing timing and ownership.

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A STORY TO INSPIRE:

A health insurer sought to keep an open and ongoing conversation with its members around their needs and experiences to create a value exchange between its members and stakeholders. An ongoing community was established to gain a more personal and stronger understanding of member needs and behaviors, while also supporting agile experience design initiatives. The community has supported several large-scale and small-scale changes to the member experience, supporting improvements in communication, website assets, and call center support.

WANT EVEN MORE INSPIRATION ON HOW TO SPARK ACTIVATION?

Explore our **Activation Look Book** to learn more about the three pillars of activation and get inspired with best practices and case studies on how to drive customer understanding for business growth.

Interested in learning more about ways insight communities can be deployed for organizational success? Explore additional resources to drive deeper understanding on how to determine and leverage the right community strategy for your team.

→ **Communities e-Book: A Guide to Research Communities**
As a cornerstone of customer-centric organizations, communities empower internal teams to treat customer as stakeholders.

→ **Communities: The Cornerstone of Building Reciprocal Relationships with Customers**
Download our e-book to discover how you can leverage online communities to give your customers a seat at the table.

→ **Research Communities Partner Evaluation Worksheet**
Explore our worksheet designed to assess community partners.

→ **Webinar: Communities & the Art of Choice**
How do you know how much is too little or not enough when it comes to size, sample, engagement, technology, and of course, cost?

READY TO BEGIN YOUR JOURNEY?

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