“The 10 Step Guide to Using Online Communities”

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Online Communities....

“If you build, they will come”
Over the last ten years, online communities have become the fastest growing and most widely used of the new research techniques. However, to get the maximum value from your online community you need to ensure that you design and utilize your community in the right way. In this eBook, Ray Poynter (a leading expert in new market research techniques) sets out 10 key steps that will help you design and use your online community in an optimal way.

The ten steps cover the following points:

1. Identifying a community of interest
2. Short-term or long-term?
3. Qualitative, quantitative, or a mixture of both?
4. Recruiting your community
5. Discussions don’t just happen
6. Intrinsic and extrinsic rewards
7. Balancing work and fun
8. Using Behavioral Economics to promote engagement
9. The role of the community manager
10. Some ideas for projects and research tools

1. Identifying a ‘Community of Interest’

When we talk about ‘Online Communities’ or MROCs (‘Market Research Online Communities’) the word ‘community’ is not simply an ornament - it goes to the very heart of why this approach is so powerful and so productive. The key is to work with people to collectively produce something that will help both customers and the brand. If you want to recruit people to a platform and then work with them to achieve some common goals, you need to identify and nurture a community of interest.

In many cases the starting point for the community of interest will be that they are customers of your brand. For example, a retailer might create a short-term community of people who shop at both large-format stores and express stores to investigate the best range of options for the express stores. The members of the community have a shared experience, the experience of shopping at your large and small format stores. These people also share with you an interest in making these stores meet the needs of people who shop in these express stores. The shopping experience is the shared interest of the community. This community of interest will be nurtured by showing the members they are being listened to, by sharing news about progress with the community, and by rewarding them with incentives relevant to them and their shopping experience. The most powerful
way of developing that community of interest is to report back on the changes they have helped create.

There will be situations where your community is not going to comprise just customers. Perhaps you are an alcohol brand, producing wide range of brands in different categories, such as vodka, gin, whisky and brandy. You would like a long-term community that reflected these different categories and within these categories the different brands. The community of interest in this case has to be focused on spirits and spirit drinking. The community might have a name that was both fun and carried semiotic resonance (such as Speakeasy), it would ensure that every month it covered a wide range of spirits to keep the community relevant to all of its members. For example, if you do nothing but gin for two months, and then nothing but brandy for six weeks, you will erode the spirits community, lose members, and reduce the quantity and quality of feedback and crowdsourced insight.

When you are creating your online community, make sure you identify the community of interest. During the lifespan of the community, ensure that you keep nurturing this community of interest.

**2. Short-term or Long-term**

One of the key things you need to get right is whether you are creating a short-term or long-term community. A short-term community typically lasts from one to six weeks (but can be shorter or longer) and addresses a single research project. A long-term community is normally thought of as not having an end date, but the concept of thinking of it as an annual commitment is typical. A long-term community is not normally used to tackle a single need; it is a way of creating a channel to talk to customers and of co-creating long-term values.

If you are creating a short-term community, then the degree of community engagement is likely to be lower, the level of short-term effort required by members may be higher, and the extrinsic incentives (e.g. cash) will tend to be
higher. A short –term community should be chosen because it is the best solution to a specific problem, where ‘best’ will involve a calculation that factors in speed, cost, effort, and quality. A short-term community is often managed by a market researcher, possibly assisted by a community manager.

A long-term community is a commitment to ongoing communication. This means that the internal client and the research team need to think about how they will ensure there is always work to be done, that the work will not become tedious for members, and that the community remains engaging for members. Long-term communities are typically looked after by community managers, people who are focused on making sure the community receives feedback, is invited to take part in fun activities, and are kept aware of how useful they are to the shared endeavor.

Long-term communities tend to deliver more research for a given amount of spend (compared with ad hoc projects), but they do not often reduce the total amount of spending, they work best when they are fully employed, which is why they deliver more for the same expenditure.

3. Qualitative, quantitative, or a mixture of both?

When you are designing your community, think about the sort of research you are going to conduct. If it is mostly going to be surveys, you need a good survey system as part of the platform, if you are going to be focusing on qual then you want a good range of qual tools (including discussion boards, focus groups, chats etc).

If your community is going to be mostly qual, it is probably going to be smaller (e.g. 30, 100, or 300), and the tasks are often going to be more demanding (in terms of effort and time) so the incentives may need to be higher. If your community is going to be mostly quant, then your community is going to be larger (e.g. 1000, 5,000, or 50,000). You will need a platform that can automate your communication with members, you will be offering either small incentives or
prize draws, and you will not be able to have many one-on-one discussions with community members.

If your community is a long-term community you will often want to have a mix of qual and quant. This means combining the best of both (for example, automated communication and sampling tools, as well as fun methods for online discussions and co-creation). But, you will also need to accommodate some inconsistencies, for example the incentive for a survey might be a prize draw, but if people are taking part in a week-long ethnography project, you might need to pay each one of them $50 or $100.

4. Recruiting your community

The best communities are communities that have a clear community of interest, a community of interest between the members and between the members and the people running the community. One great way of helping to achieve this is for the community to be created from customers, ideally by the client, from their existing customer communication channels. If a client has good databases, then an invitation request emailed to the prospective members is a great option.

If there are no customer lists that can be utilized, then the community will often have to be recruited from other sources, such as list brokers, online intercepts etc. This method usually results in lower take up rates and can skew the community towards those focused on extrinsic (e.g. cash) incentives.

If the community is a long-term community then you will need to recruit additional members at some point, as there will be people who leave the community (or who you remove). The best way to manage additional recruitment is to do it regularly, recruiting relatively small numbers, and targeting the recruitment at the sorts of members in shortest supply / highest demand. If you do a large recruitment, say every 18 months, you will find that the responses from your community show unwanted patterns, because the balance has been disturbed.
5. How big should your community be?

There are three factors that help determine the size of the community.

a) What type of research you want to conduct? If you plan to conduct only qual research the community will be smaller, for example 30, 100, or 300 people. If you want to conduct quant research the community will tend to be larger. The key driver for a quant community is the cell sizes you want to report. If you want to report cells of 100 people, and you expect to get a response rate of 33%, then you need 300 people in your community for each cell you want to report, as a minimum. Similarly, if you want to report a total sample size of 1000, and you expect a responses rate of 25%, you will need at least 4,000 members.

b) What volume of research do you plan to conduct? In most cases you do not want to be conducting more than one project a week with an individual member, and you do not want to be conducting fewer than one project a month which each member. If you want to conduct two projects most weeks, then your community will need to be twice as large as a case where you only want to conduct one project a week.

c) How many customers do you have? In B2C (Business-to-Consumers) communities, this factor is not normally an issue, but it is often an issue in B2B (Business-to-Business). If you have 10,000 customers, then it is likely you will only be able to recruit 1% to 5% of them to join a community – which means your community is likely to have a maximum of 100 to 500 members.

6. Discussions don’t just happen

When online communities were first being discussed, back in about the year 2000, there was an assumption that they would be self-sustaining. The vision was that brands would create them and members would generate a stream of user-generated content and the brand would simply harvest the insights. This did not happen, it turns out that if people want to create their own content online they
will do it in Facebook or Instagram or some other mainstream social media platform, not in your walled garden (i.e. your online community).

To get insight from an online community, you need to generate conversations, you need to have a discussion guide, and you need to nurture the discussions. Post topics that are interesting, when people respond, make sure you respond to them, promptly. Highlight good contributions, make a fuss of somebody if it is the first time they have posted, and at the end of the discussion, report back on what is happening next and thank people for their contributions.

7. Intrinsic and extrinsic rewards

When people help you create the future of your brand they need to be rewarded, first as a matter of justice, but also to help ensure that they become and remain engaged and committed members your community. There are broadly two types of rewards extrinsic (e.g. cash) and intrinsic (e.g. praise and thanks). In an ideal situation you will be able to blend both intrinsic and extrinsic rewards.

Extrinsic rewards refer to rewards that have a tangible value, and typically a value than can be transferred to others. The most common examples are a) cash per activity (often referred to as pay to play), b) a cash prize, c) prizes, d) points (points can be accumulated and redeemed for either cash or prizes). Extrinsic rewards have many benefits, and for short-term communities they are often the best option. The first negative with these rewards is the cost; extrinsic rewards, which are valuable, are also more expensive to offer. Cash per activity is the most expensive and tends to be reserved for smaller communities, for short-term communities, or for special activities (e.g. ethnography). The second negative of extrinsic rewards is that they can be associated with an absence of intrinsic rewards. If community members are only taking part because of the cash rewards, their relationship quickly become one of paid help, rather than a collaborator, shifting the focus from a shared interest towards the divergence created by members wanting to maximize their rewards and the client wanting to minimize costs.
Intrinsic rewards are typically things that make people feel better or happier, but which can’t be transferred to others. Examples of intrinsic rewards include: thanks and praise, information that is of interest, the chance to try new products (e.g. a new game, or a new food product, or a new phone), feedback on the results of research projects, or opportunities to visit the client’s site/factory/offices/locations etc.

One of the best ways to motivate a community and to generate high quality insights is to blend intrinsic and extrinsic rewards. There is a well-known phrase about ‘different strokes for different folks’, which recognizes that different people will be motivated in different ways – this applies to the members of your online community too.

8. Balancing work and fun

Your online community has been created to meet business needs, but in order to maximize its value you need to ensure that the experience for the members is rewarding. In most cases this means ensuring that the experience for members includes elements that are fun – reminding us of the old proverb “All work and no play makes Jack a dull boy.”

There are lots of ways of making the experience more fun, including: surveys that are like the fun quizzes in magazines (for example finding out which personality type you are, or how does your knowledge of popular culture compare with others), projects that ask people to do things like capture a video or take a picture of some aspect of their lives, or you can ask people to take part in a game. And remember that often ‘a change is as good as a rest’, so introducing new types of tasks and projects can seem like fun) and doing the same thing over and over will seem like work, even if it started as fun.

9. The role of the community manager

The most important role in the utilization of an online community is that of the community manager. This person may be a researcher (but not necessarily), their
key role and key skill is to deliver value from the community by keeping it engaged and productive. In many companies the ‘community manager’ is actually a team of three people, a junior person who is doing 80% of the work, and who is focused on their community, an intermediate team member who will cover absences, help with busier periods and provide day-to-day and week-to-week guidance, and a senior team member who will provide leadership, conduct monthly reviews and ensure that quality standards are set and met.

The community manager should be monitoring the community several times a day, responding to queries, encouraging participation and developing a rapport with the members. The community manager is also the key person in connecting the users of the community with the value of the community. This role will include providing advice on how to use the community, packaging and communicating findings from the community, marketing the community to the organization and protecting the community from abuse (for example protecting it from long and boring surveys and protecting from too many boring projects).

10. Some ideas for projects and research tools

Some ideas for projects to run with your community include:

i.  MaxDiff, if you want to evaluate offers, services, options etc. Ask them as a series of MaxDiff questions and your community members will appreciate the shift from scales. To add to the insight, on the last screen of the MaxDiff, ask ‘Why?’ they selected those items they selected as Best and Worst.

ii. Whatsapp discussion, recruit a sub-group from your community and use Whatsapp to have a free-flowing, fast-moving discussion. Remember, as well as questions you can send images as part of the stimuli, and participants can send images too.

iii. ‘A day in the life of’, ask people to collect information about a full day, for example every drink they have that day or all of their journeys. One way to do this is to give member a survey link they can use every time the event happened, with a survey that takes about 60 seconds to complete (e.g. what is the drink, did you buy it or make it, where are you, and how...
did it make you feel?). When you come to analyze the day in the life data, remember to use the time of day from the metadata.

iv. Use fun quizzes; perhaps you can create something like this one asking ‘How Green Are You?’ The data may never be useful, but you will be offering your members something which is fun, and which gives them some immediate feedback. Remember that I said earlier that the minimum number of activities per member should be one-per-month. If there are members who would not receive an activity in a particular month, the fun quiz is a great option.

v. Omnibus Surveys; an omnibus survey is one that you might run, say, once a month and you ask for individual questions from your colleagues, put four to six of these questions into the omnibus, providing a wide range of answers.

vi. Creativity competitions create situations where members can show their creativity and you can gamify this too. For example, show some ads from other countries, with the text removed and ask people to guess and write-in the caption.

vii. Create ‘missions’ for your members. For example, today we want you to take and upload a picture/video of: the most comfortable chair you can find, the best shop window you know of, the oldest thing in your kitchen, your partner loading the dishwasher etc.

**Conclusion, it’s all about the community of interest**

These ten steps will help you create, maintain and utilize you community. But the single biggest point to remember is that it should be a community of interest. You and you members need to be working together towards a common goal.
The Author – Ray Poynter

Ray has spent the last 40 years at the intersection of innovation, technology, and market research, during which time Ray has held director level positions with Vision Critical, Virtual Surveys, The Research Business, Millward Brown, Sandpiper and IntelliQuest. Ray is the founder of NewMR.org and for the last few years has run The Future Place, focusing on consultancy and training. Ray is a part-time lecturer at Nottingham Trent University (and has also taught at Saitama University in Tokyo) and is a content author for the University of Georgia’s Principles of Market Research course.

Ray is the author of The Handbook of Mobile Market Research, The Handbook of Online and Social Media Research, the #IPASOCIALWORKS Guide to Measuring Not Counting, co-editor of ESOMAR’s Answers to Contemporary Market Research Questions, and has contributed chapters to several other books and publications. Ray is a frequent blogger, webinar producer, and keynote speaker.

Ray runs a wide variety of courses for both private organizations and industry trade bodies. Ray is the independent consultant running ESOMAR’s biennial Global Prices Study and is on the editorial board of the GreenBook Research Industry Trends (GRIT) study. In 2018, Ray was elected to serve on the ESOMAR governing body, its Council.
Ray has a degree in Computing Science and Economics from the University of Salford, a Post-Graduate Certificate of Education (a teaching qualification) from the University of Nottingham, and a Masters Degree in Research Methodology from the UK Open University.

**Co-Author – Dan Fleetwood**

Dan Fleetwood is the President of QuestionPro Communities. He has over 15 years of market research experience and is passionate about the role that software plays in helping businesses. Dan believes that software can help companies get better feedback, uncover actionable insights, and ultimately develop better products and services.

Dan has been a guiding light for communities’ customers over the years. By marking sure they have not only the best and most innovative software to use and also providing the knowledge to ensure their community is setup correctly, client have consistently achieved optimal success with their community.
The Insights Platform

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**Superior Technology**
The system has been designed from the ground up to accommodate the needs of anyone conducting online research. Our simple interface, cutting edge features, and competitive price have landed us in the top tier of web-based survey software providers. We truly believe that you will not find a better value on the web today.

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