

Creating Relevance With A DIY Customer Panel

The Quirks Event 2023



Agenda

About Us

Goal for Session

Challenges

Panel & Impact

Researcher's Journey

DIY Options

Case Example

Q&A

About Us



Jana Prah
Research Manager

- Over 9 years of MR experience
- Worked client services at Material+ (formerly LRW) and currently works at Savage X Fenty
- Passionate about bringing data to life



Kim Pan
Research Analyst

- Over 6 years of MR experience
- Worked agency side B2B & B2C research at Material+ (formerly LRW) and currently works at Savage X Fenty
- Passionate about finding the right people to create high value impact



Christa Shelmon
Research Analyst

- Over 4 years of MR experience
- Conducted research in retail, restaurant, and entertainment spaces at Breakthrough Research and currently works at Savage X Fenty
- Passionate about cultural / multicultural research

Note: Opinions expressed today are based on our diverse experience we've gained across various companies and no single organization.



Customer Panel: Goal of Session

Inform and excite on **ways to engage audiences**, particularly those that may be less readily available or more difficult to reach by utilizing an internal customer panel

We'd also like to encourage research professionals to continue innovating in an ever-changing world

People, their voices, and opinions are constantly evolving, and as research professionals, we should aspire to adapt to change

The Challenge



Disclaimer: We realize there may be a host of other challenges that others may experience with creating a panel. For today's session we will just be walking through our diverse experience we've gained across various companies.

What Is It & Why Do People Use It?

A panel of consumers who have self-selected to provide feedback to a company

A quick way to get feedback from consumers – both quantitative (large sample size) & qualitative

Allows businesses to rely on a community of consumers for quick & honest feedback, to pilot new features amongst a small community when necessary, and to ultimately, stay close and true to the consumer

Results in...

Better Marketing
Better Product Design
Better Operations

Happier Customers!

What does a strong panel look like?



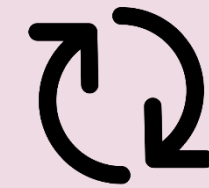
A group of consumers that represent current customer demographics & psychographics

If your customer base is 10% Hispanic, your panel should represent that



Those selected to participate are considered active customers

Active definitions can vary, but may be based on general engagement with the brand



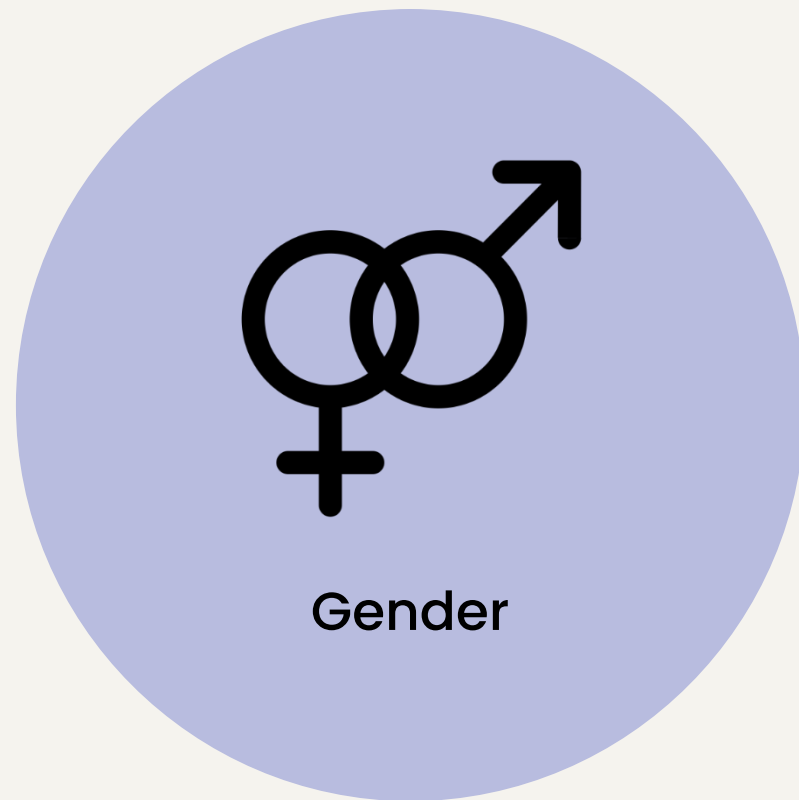
Panel can be refreshed so that companies can hear fresh voices and opinions

And to give other customers a chance to participate!

Powerful ways to answer study objectives

What info can you collect?

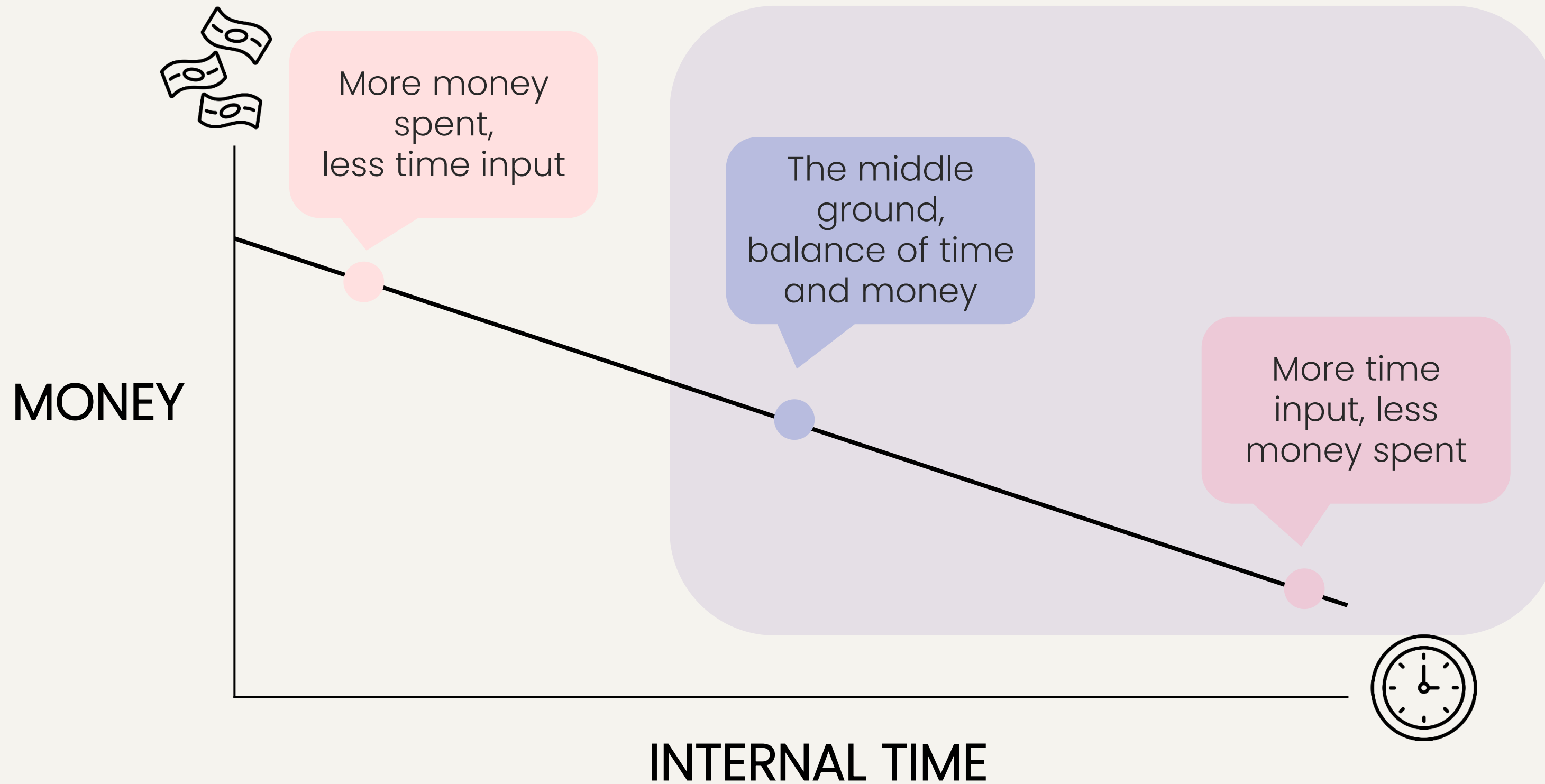
When you invite customers to join the panel, you can ask a series of relevant questions that can later be used for segmentation purposes

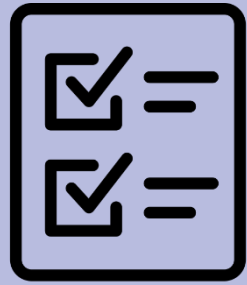


Prompt panel invitees to sign an NDA upon registration and ensure them that their information will not be shared and used for research purposes only

Researcher's Journey

Time Vs. Money





Quantitative Research

Surveys can be sent to customers in the panel across a range of topics

Helpful for quick feedback that among a company's customer base

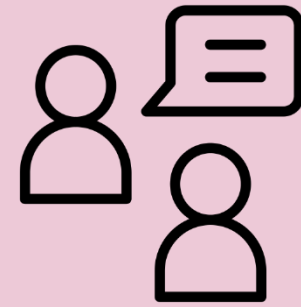
Ways To Engage A Panel



Product Testing

Allows for on-hand access to customers to gain product feedback

Access to the panel allows for quick contact, allowing for products to be sent in a timely manner



Qualitative Research

Can be used to recruit for interviews, focus groups, etc.

Access to the panel allows for impromptu recruiting, which can be helpful for projects with quick turn-around times



UX Research

Can be used to recruit for user experience research

Access to the panel allows for impromptu recruiting, which can be helpful for projects with quick turn-around times

Panel Email Invite Example



TELL US YOUR OPINION!

What do you like about these products? What can be better?

Join our survey panel to help this company better serve our customers

JOIN HERE

Sign up below.

We will let you know if you are selected

LEARN MORE

**Will be instructed to sign a participant NDA to complete registration.*

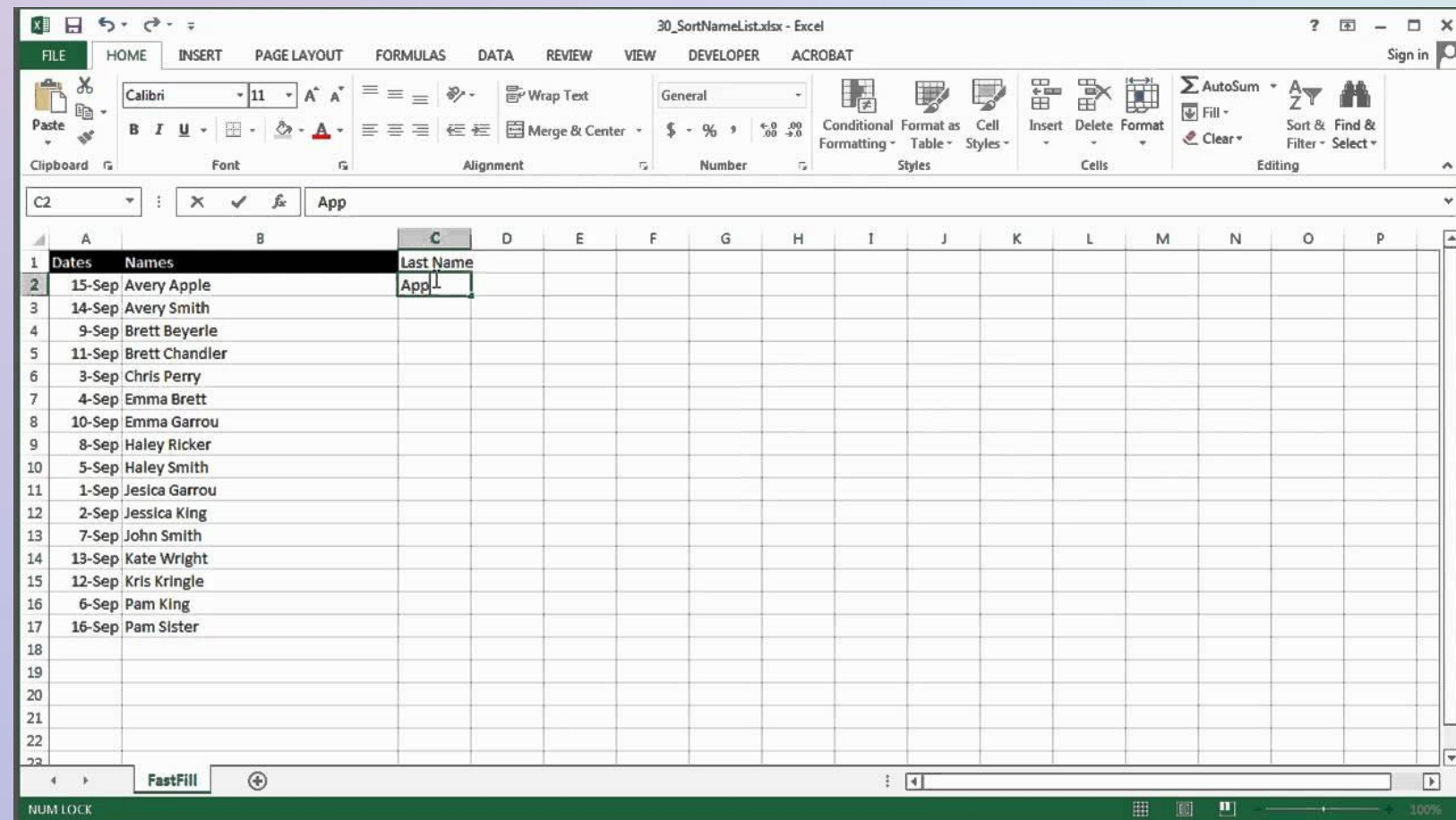
So, how can a researcher DIY?

Consider these two options when thinking about how you want to manage your panel

Option #1:

More time, less money

Use excel to manage panel participants



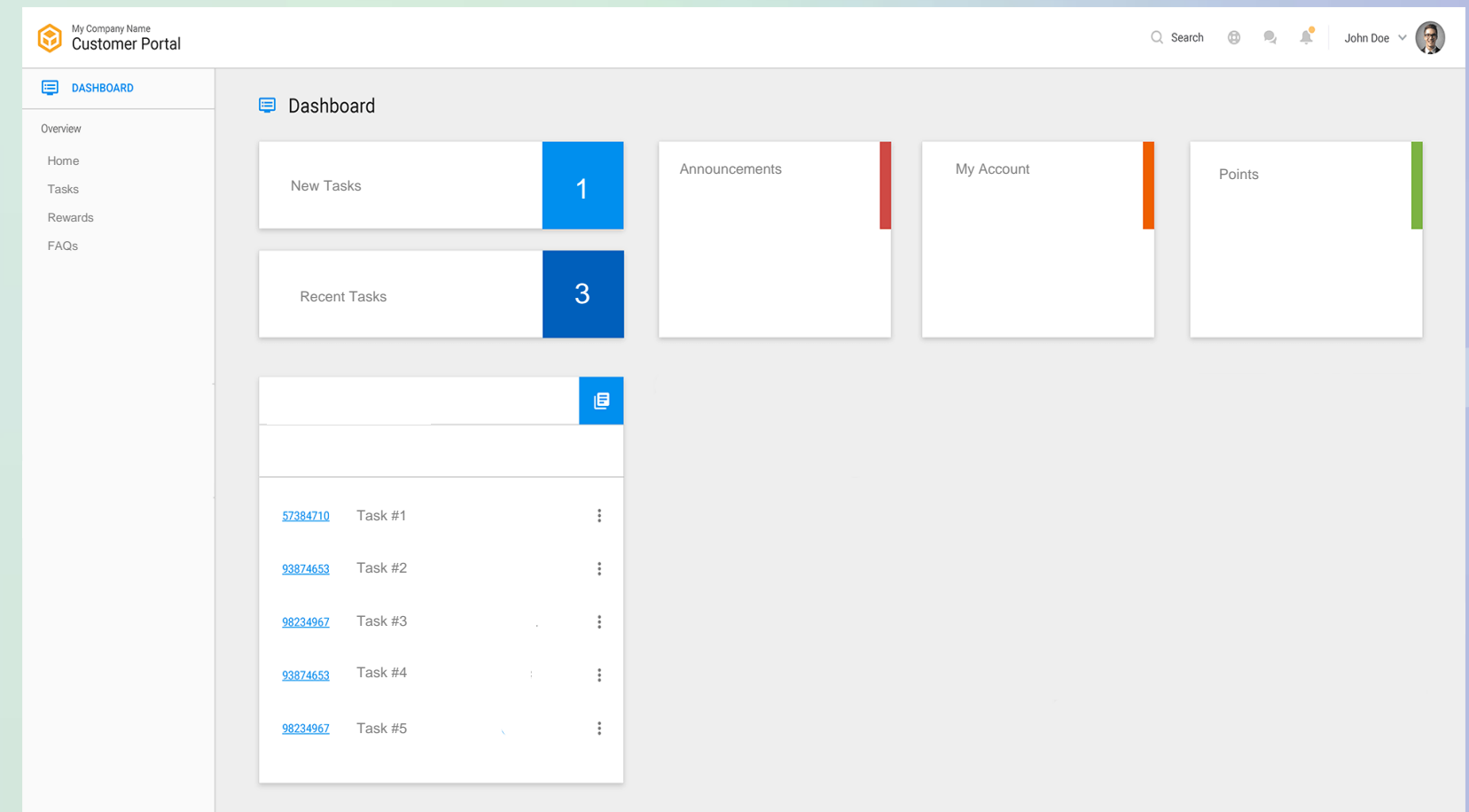
The screenshot shows an Excel spreadsheet titled "30_SortNameList.xlsx". The spreadsheet has three columns: "Dates", "Names", and "Last Name". The data is as follows:

Dates	Names	Last Name
15-Sep	Avery Apple	Apple
14-Sep	Avery Smith	
9-Sep	Brett Beyerle	
11-Sep	Brett Chandler	
3-Sep	Chris Perry	
4-Sep	Emma Brett	
10-Sep	Emma Garrou	
8-Sep	Haley Ricker	
5-Sep	Haley Smith	
1-Sep	Jessica Garrou	
2-Sep	Jessica King	
7-Sep	John Smith	
13-Sep	Kate Wright	
12-Sep	Kris Kringle	
6-Sep	Pam King	
16-Sep	Pam Sister	

Option #2:

Balance of time & money

Use a web development team to create an online portal for panel



The screenshot shows a web dashboard titled "My Company Name Customer Portal". The dashboard includes a sidebar with navigation options: Overview, Home, Tasks, Rewards, and FAQs. The main content area is titled "Dashboard" and features several widgets:

- New Tasks:** 1
- Recent Tasks:** 3
- Announcements:** (empty)
- My Account:** (empty)
- Points:** (empty)

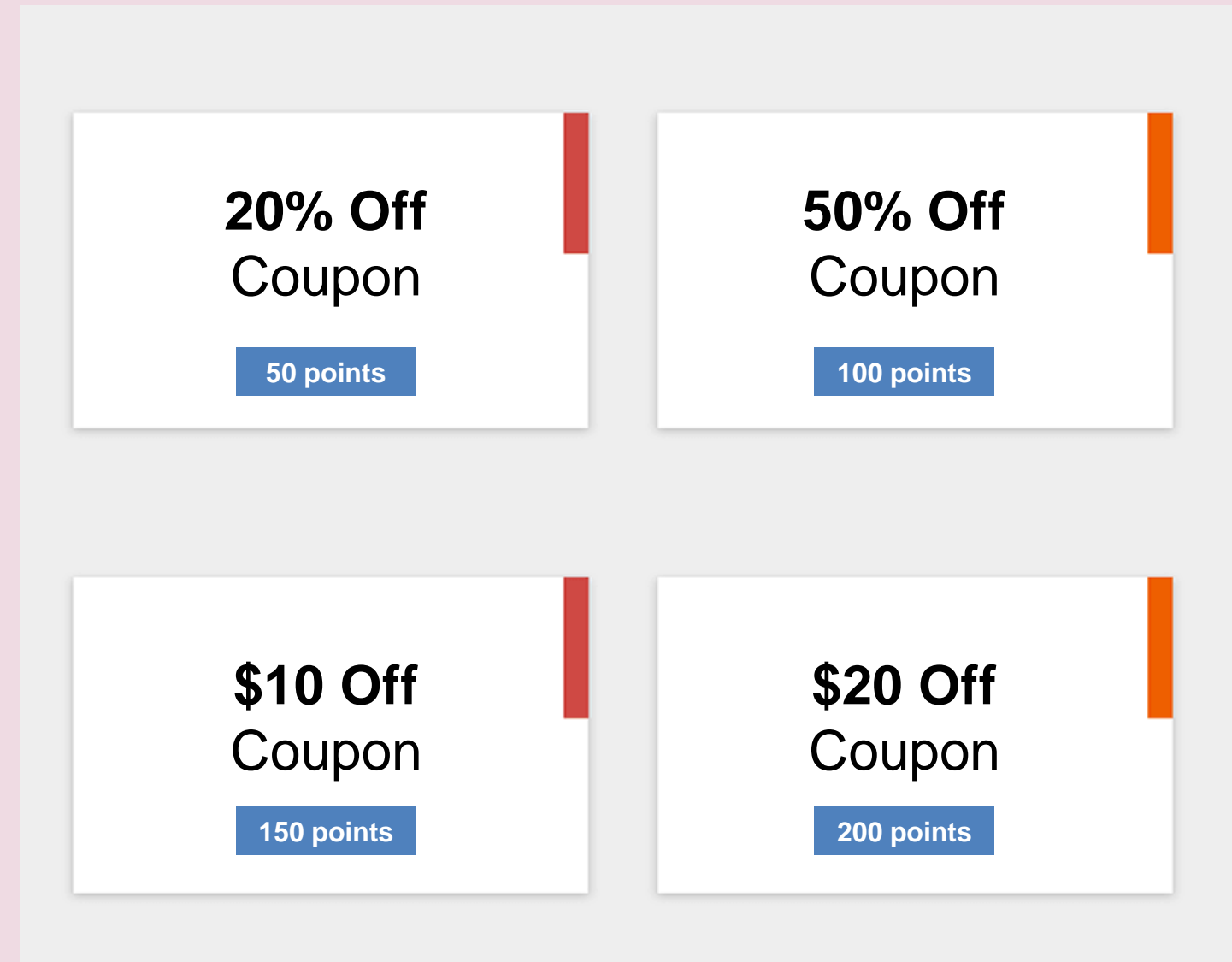
Below these widgets is a list of tasks:

Task ID	Task Name	Action
57384710	Task #1	⋮
93874653	Task #2	⋮
98234967	Task #3	⋮
93874653	Task #4	⋮
98234967	Task #5	⋮

Try gamification to keep engagement up

Once customers accumulate a certain number of points, they can cash them in for coupons

The more points accumulated, the bigger the reward!



Engagement Polls ⚡

You can also engage customer panels more generally

You may have a survey that does not go out for a while, but sending out quick polls can help maintain engagement in the meantime

Topics Can Include:

- General pulses on how they're feeling
 - *How are you feeling in the new year?*
 - *Prices are rising, how are you feeling about shopping?*
- General 'what do you want more of' pulses
 - *What products do you want to see this season?*
- And more!



Questions?

Thank you!