

Sarah Faulkner, Faulkner Strategic Consulting
sarah@faulknerstrategicconsulting.com

Authenticity, Empathy, and Integration: Key Themes from the 2017 West Coast Quirk's Event

I recently attended the inaugural West Coast Quirk's Event in Irvine, California, a market research industry conference focused on "big ideas, real-world solutions". Looking back, the unofficial theme of the presentations I saw seemed to be: let's get closer!

This played out in multiple ways: get closer to reality with new ways of collecting data, including in-the-moment research, get closer to consumers/customers with co-creation and empathy in research, and finally, get closer to seeing the whole picture with mixed methods and data integration.

Here are a few more specifics and examples from the conference to bring these themes to life.

In-the-moment research ensures authenticity in data collection

- Dave Decelle, Netflix, shared his experiences with using in-the-moment video diaries to learn about when and what people are watching video, without recall bias. To make it even more true to life, the team started with their own internal customer data to identify actual viewing behavior trends and then created customized schedules to push surveys out in prime viewing periods.
- Layla Shea, Upwords, reinforced the need for in-the-moment research by highlighting the differences between stated intentions and reality in her presentation, "The Road to Ruin in Paved with Stated Intentions". Humans are notoriously inaccurate with recalling memories as well as predicting their own future behavior. She gave examples of using digital journaling to conduct in-the-moment and in-context online qualitative research.
- Kelley Styring, Insight Farm, shared how she uses "selfie ethnography" and digital missions as applications of behavioral science principles in research. In addition to conducting the research, these techniques can also be applied as a screening tool. For example, she might ask participants in a multi-phase research project to refer and friend and then "audition" that person via a digital ethnography assignment.

Co-creation and shared experiences compress timelines and foster empathy

- David Lundahl, InsightsNow, talked about the trend of corporations moving from linear to "spiral" innovation approaches, which is requiring a parallel shift in research approaches. Some of their new approaches include: testing all aspects of a proposition at once, relying more on behavioral (vs. claimed) insights, and the use of wireframes/prototypes earlier in the process. They provided a case study of a 3-day iterative design sprint with concept co-creation, prototype-matching, and a larger-base validation step, which saved the client about six months versus their traditional process.
- Catherine Cooper, EmpathyWise, shared a compelling case study from a financial services client seeking solutions for the under-banked, applying the design thinking framework. In

the Empathize stage, they did one-on-one interviews with customers using metaphor elicitation and other projective techniques. The resulting customer stories gave deeper understanding and new inspiration for the client team, leading to the development of a totally new business model for that target audience.

- Debbie Balch, Elevated Insights partnered with Gail Tomiak, USAA to share the story of how they brought USAA customers to the company's executives in an interactive, conference-style one day event. The executive group interacted with 100 current members in a combination of face-to-face and virtual conversations. This event brought the USAA members to life in a new, richer way for participating company leaders, replacing facts and figures with faces and stories. Executives walked away inspired, energized and full of new ideas, solutions and opportunities.

Mixed methods and data integration provide holistic insights

- Candice Rab and Becky Wu, Luth Research, shared an example of their consumer Pathways to Purchase methodology which combines multiple research modalities to truly capture the entire process. In addition to traditional qualitative and quantitative research, they also have access to digital passive tracking data (across devices) to understand search, social and other online behavior. This approach also integrates geo-fencing and geo-tracking capabilities to capture brick and mortar behavior, allowing true omni-channel insights.
- Evencia Leite, TrendSource, Inc., shared an insightful case study about their work on the Pokémon brand that focused on multi-source integration. The client had a very broad set of objectives, ranging from key driver of retail execution all the way to new product opportunities, so the agency designed a multi-prong learning plan to provide holistic insights, including both primary and secondary quantitative data (e.g. retail audits, panel surveys) as well as qualitative approaches (e.g. customer intercepts, shop-alongs).
- Tyler Kettle, IBM, talked about their need to move from large scale projects that meet the needs of the few to continuous, customizable research. To accomplish this, they initially developed an online research community, which has since evolved into their "Always-on Intelligence Platform" which encompasses: social monitors, insight platforms, bi-weekly pulse surveys, and deep-dive custom research, as needed.