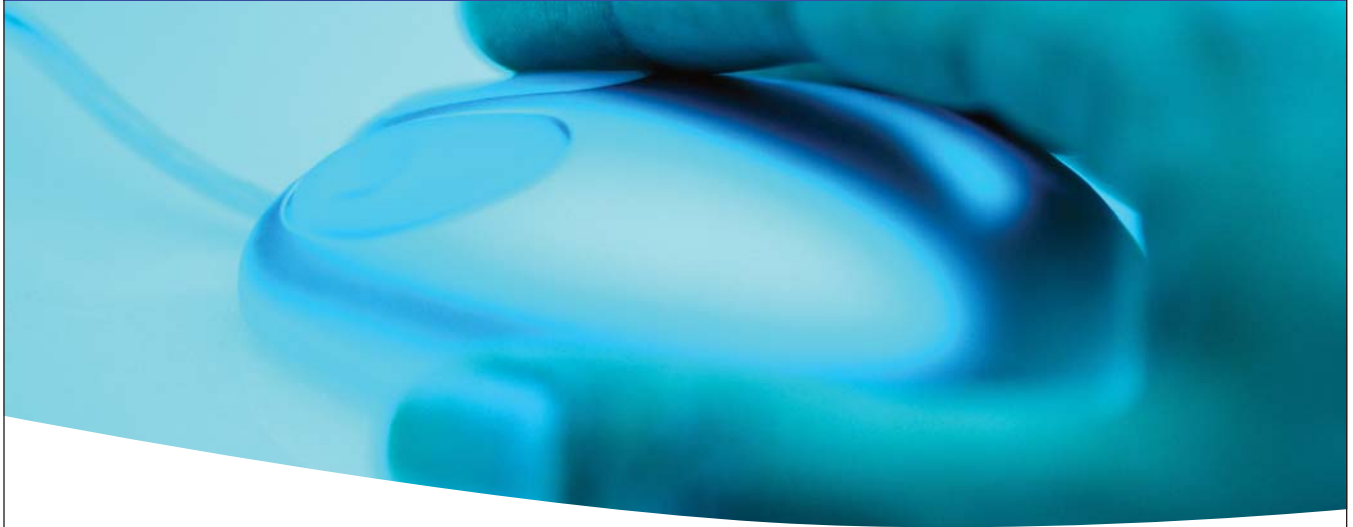


Point of View



Building a Quality Member Research Panel



The future of online panels remains extremely positive. We are seeing more and more of our clients building their own customer, employee and stakeholder panels, either going it alone with self-serve software or partnering with a research supplier.

Ipsos is managed by market research professionals and is dedicated to providing the best quality of research possible and this includes helping clients build panels. This Point-of-View shares our managed access panel philosophy, and provides some ideas on how to get the best use from a Member panel.

Building a Panel – How hard can it be?

Some believe that almost anyone can build and maintain a panel to conduct survey research with their customers. How hard can it be?

It can be – no, make that, *usually is* – daunting, say many who have tried and abandoned the endeavour. So much for their hope of saving money.

The bottom line is that managing a customer panel is complex and really does require expertise. There are privacy laws, anti-spam regulations, and panelist issues to deal with, among other matters. It takes successful experience and seasoned know-how to recruit panelists – and keep them.

Ultimately, of course, you want to be sure that the survey results you capture are valid and unbiased. The results of a survey are only as good as the sample and survey design.

- **Sample design:** samples need to be representative.
- **Survey design:** you want to limit bias and maximize response.
- **Data analysis:** potential biases must be considered and base sizes should ensure projectable results.

Defining who to recruit to be on a panel is a huge consideration. Those recruited to the panel form the “population universe” from which samples are pulled for individual studies.

Former do-it-yourselfers say they thought, but didn’t really know, how to design a panel recruitment survey or ensure that individual samples from the panel were pulled and balanced properly. Interpreting the results was a whole other matter. Few fully understood, for example, the potential for biases.

And they discovered that while building a panel can be overwhelming, daily management is always time-consuming. How so? You have to answer panelist queries and concerns, ensure they’re not over burdened or under used, administer an incentive program, keep the database clean, and track survey activity.

In addition to managing the panel, there are technical and maintenance issues. Operating a customer panel requires technical infrastructure and people who are experienced in maintaining a database and conducting online surveys. The strength of any panel depends on connectivity and survey accessibility. This all assumes a high deliverability rate of survey invitations and that’s not easy to achieve in today’s junk-mail box environment.

Peace-of-mind is at the heart of why do-it-yourselfers turn to our full-service approach to managing panels and the resulting research. Ipsos knows how to build and administer credible and effective panels, from 400 to 400,000 in size.

The Many Benefits of a Professionally-Managed Member Panel

A wide variety of research and marketing objectives can be met through the development of a Member Panel, from short-term needs through to long-term planning.

A Member panel can serve to enhance, replace or be a catalyst for new Member research initiatives. The following touches on just some of the marketing and research possibilities and is based on experiences from our other clients who have built a customer (Member) panel.

Client Owned Means You are in the Driver’s Seat.

Clients own the panel, and the sample for research is available to them at any time. A panel is a cost-effective research tool compared to paying for ad-hoc custom research projects. While clients will invest in the initial build of the panel and the maintenance of it, they will forevermore have a relatively low-cost research tool because you will own the sample source.

Fast and Reliable Research allows for Quick Decision Making.

With the Ipsos’ Interactive Forum software, clients can launch surveys with 24 hour’s notice – guaranteed; and survey results are almost immediate with real-time 24/7 access. Fast turnaround is paramount in today’s business environment where business leaders need to react quickly to the marketplace. Suppose a competitor came out with a new product and you needed to find out FAST Member reaction to that product – awareness and likeability? With a Member panel, within one day, clients can have a quick survey out to the Membership and specifically those who are most impacted by the competitor product, to find out what they think and help determine defensive measures.

Give Your Members the Opportunity to Help Build Products.

Not only is a panel an excellent way to keep your finger on the pulse of competitive products, your panel Members can also help you stay ahead of the competition by helping with new product development. The panel can be used to gather very rich, insightful, qualitative data from Members. With the Ipsos Interactive Forum platform, "bulletin board"-type questions can be posted where Members can see and build on other Members' responses. This has proven to be an ideal tool for idea generation and brainstorming and can be used to develop new initiatives/programs.

Help Members Understand Complex Products.

The bulletin board feature can also be used as discussion forums on complex products. Ipsos has sector experts in dozens of industries who understand exactly why some products can be confusing to Members. A panel discussion forum can get to the bottom of what is driving the confusion and help build communication pieces that help Members understand complex products.

Understand Your Members Throughout their Member Lifecycle.

If a key objective is to retain Members and build loyalty, it is important to track Member habits over their Membership life-cycle. With a panel, and specifically, with the Ipsos Interactive Forum software, panel Members can be tracked over months and years. For example, tagging panelists who are "new Members", clients can track such a group through the different life cycle stages of Membership.

Gain Further Insight from Existing Research.

Results from extensive, complex research often leads to more questions, but there's little budget for yet another comprehensive research study – the panel forms the perfect opportunity to answer those questions, quickly and easily with no added cost.

Track Member Satisfaction.

The panel can be used to gain knowledge, both quantitatively and qualitatively on Member satisfaction – satisfaction with specific products and with specific services. With the Interactive Forum tool, you can create a specific "sample group" (e.g. those who said they were dissatisfied with a particular service), then implement changes to address the issue, then go back and re-survey those same individuals to see if service levels have improved.

Explore Member Feedback regarding Your Website.

Ask a representative sample of panel members to visit the website (with a link to the site in the survey), asking for their input about the site. If they suggest something worthwhile, you can develop prototypes, then test them with the same group of panelists, and finally, go back to them after the site is updated to ask how they liked the change.

Provide Your Internal Clients with Answers – Fast.

Your Member Panel will prove to be an invaluable tool to answering ad-hoc questions posed by your colleagues, be they Managers, Executives or Board Members.

Survey Research Data + Transactional Data is Very Powerful.

When recruiting the panel, if you have defined Member segments, this can potentially be re-created/tagged in the database to allow for custom research based on a specific segment. Further, as the panel continues to grow and become more robust, and if privacy concerns can be addressed, we can investigate methods to marry transactional information with survey-based information – the future of online research!

Add Power to Your Marketing Materials.

Your Member panel will provide a forum for gathering Member testimonials for use in marketing and communication pieces and in Member newsletters and press releases.

Create Member Loyalty.

If, again, your objective is enhancing Member loyalty, simply building a Member panel confirms for Members your dedication to obtaining customer feedback and opinions, and will build goodwill among Members.

Ipsos Panel Management Expertise

When considering building a custom proprietary panel, compare Ipsos on the following measures:

- Proven experience in building and maintaining online proprietary panels. Ipsos first developed and implemented an online proprietary panel nearly a decade ago, and has developed panels for a host of Fortune 500 companies.
- As well as managing our own Ipsos offline and online panels in Canada and the U.S., Ipsos North America provides full-service management for many proprietary online panels. A combined panel size of more than 50,000 panelists is actively managed for several key accounts.



North America

Europe

Latin America

Asia-Pacific

Middle East

- A state-of-the art, Ipsos-built panel and online survey platform, the “Ipsos Interactive Forum” is used to house all our online proprietary panels. Ipsos are the pioneers in designing this type of panel software – it is rooted in our deep knowledge of panels and online research.
- In-house advanced data collection, data processing and analysis capabilities. This means that all data processing and analysis is done with no subcontracting. All data collection is conducted through Ipsos-owned resources, or through Ipsos vendor/partners.
- A dedicated Marketing Sciences group providing best-in-class advanced analytics capabilities where required.

When You Add It All Up

Naturally, in this business, trust is a big issue. The well-recognized, trusted name of Ipsos as a leading, global market research firm assures panelists that their personal information will be kept private and confidential. No other party, including the client who owns the panel, has access to this information without the express written permission of the panelist.

This approach adds an aspect of authenticity to the panel – the fact it is managed by a trusted third-party research firm ensures an unbiased approach and provides validity to the research being conducted.

All things considered, when it comes to managing customer (Member) panels, the preferred approach is to go with the expert. And get the best results – the first time.

At Ipsos, we pride ourselves in providing the expertise, support and confidence that our clients need. We’ve worked on countless research projects with many Credit Unions in Canada and look forward to working with Credit Unions as they look to build their own Member Panels. For more information on our Interactive Custom Panels, please contact Julie.Paul@ipsos-na.com

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