

EMERGE SMARTER

eBOOK INSIGHTS

ACTIVATION WORKSHOPS: MOVING RESEARCH OFF THE PAGE INTO THE REAL WORLD

THESE FACILITATED WORKSHOPS INCLUDE A SYNTHESIZED RESEARCH PRESENTATION, PLUS CREATIVE EXERCISES TO HELP THE TEAM SOCIALIZE INSIGHTS AND BRAINSTORM STRATEGIES, IDEAS, AND ACTIONS THAT FLOW FROM THE RESEARCH.

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BUSINESS-BUILDING STRATEGY WORKSHOPS

These workshops are focused on unpacking the implications and actions to be taken based on the research insights, no matter what the methodology. The resulting strategies can be broad or narrow—ranging from general to specific shopper marketing implications, communications, and ways of engaging with the target, product development ideas, etc. We generate these strategies by designing a custom session plan to deconstruct the learnings and what that means for your business. We add in creative exercises to spark new and innovative strategic ideas.

For example, one [client](#) wanted to come up with strategies to better engage with different segments. So, we looked outside the category for ideas and inspiration. During the session, the team created mindmaps (spiderwebs of associations) against each segment’s favorite brands (across categories) identified in the qual and quant research. Then, we used that output as a catalyst for thinking of new strategies and ways to message each target, specific to the client’s category.

For another client, we tasked the audience of our research presentation to capture key barriers and challenges on sticky notes as they listened. Then, when we transitioned to the activation part of the session, we posted the notes on a Twister game board posted on the wall. The audience broke out into smaller teams and were given a spinner to determine what to focus on. Once they ideated a few strategies to address their challenge, they spun again and selected a new focus area. This exercise facilitated the generation of targeted strategies grounded in consumer insights, and the parallel production of the small group work yielded a large number of ideas.

We typically have a defined structure to capture the output of the strategy to guide the team (see example below). As in other workshops, after diverging and generating a lot of ideas, we then collapsed them across broader themes and actions as we converged and prioritized. In the prioritization process, we work collaboratively with the team to think about these strategic opportunities to plot them into a quadrant, thinking about dimensions such as how feasible they are to implement, the impact they’ll have on consumers and the business, fit with the brand, etc. The result is a prioritized roadmap for action, so the team knows:

- What’s low-hanging fruit that can be easily acted upon?
- What’s a high priority strategy?
- What’s important, but more of a longer-term strategic vision?
- What should be deprioritized?

From there, we guide the team to develop detailed action plans for the high-priority strategies, thinking about specific steps to take, resources to shore up both internally and externally, any watch-outs or considerations that may get into the way to implementation. We have the team commit to specific goals and milestones to help bring the idea to life.

| THE STRATEGY FRAMEWORK (IT’S EVOLVED OVER TIME!) | |
|--|--|
| Opportunity: | What’s the key problem or challenge to solve? |
| | What do we want to do or achieve? |
| Target: | Who is this for? |
| | What type of consumer/shopper does this opportunity go after or address? |
| Solution: | What are some thought-starter ideas to address this opportunity? |
| | What can we do? |
| | Why does this matter? |

INNOVATION OPPORTUNITIES

In these facilitated workshops, we work beyond the insights to ladder up to the overarching opportunities for innovation that can fuel brand growth. As we review the learnings, we work iteratively to find the need-gap themes where the white space lies. Once we identify these opportunity spaces, we can use them as springboards for ideation.



Ideation Sessions are part of C+R Innovation Capabilities. What makes us unique in the innovation space? Our ability to lean into the consumer perspective to help you emerge smarter with ideas that resonate.

We offer multiple ways in for innovation:

- Sprint Innovation is a compressed, intensive process to go from consumer immersions to optimized concepts in a week or less.
- Deep Innovation is more robust with a staggered approach to allows time for incubation and iteration
- AI-Powered Innovation is part of our SmartSpark process, where we balance the power of AI’s generative abilities with a human perspective.
- Human-Centered Innovation, where we engage with different types of consumers depending on the phase of the process:



Everyday Consumers to gain an understanding of behaviors, needs, and pain points



Idea-Building Consumers to generate new ideas and solutions alongside clients to bring a fresh and creative perspective



Forward-Thinking Consumers to assess and refine early-stage concepts without dismissing them simply because they are new

At C+R, we don't have a black-box of solutions, but rather work with our clients to develop a custom innovation plan to meet their needs.

We had a CPG client who was basing innovation in this food category on technology advancements, but they wanted to drive growth by addressing consumers' emotional needs. Using a multi-modal approach of online qual, mobile journaling, and in-person ethnography, we first gained a deep understanding of the target's current behaviors, motivations, frustrations, and unmet needs. We then led the client team in a day-long Opportunity Workshop to unpack the insights and identify the richest areas for innovation. We identified not only short-term strategies to take into an ideation session, but also built out a roadmap for innovation that included longer-term Opportunity Platforms. These platforms, written from a consumer perspective, captured opportunities, motivations, frictions, and needs to highlight the white space for growth.

In the Ideation Session, we developed over 100 new ideas to fill the client's innovation pipeline, and turned 12 of them into full concepts ready for additional testing. The top concept hit store shelves in the next year.



Another CPG client in the snacking category was challenged to incorporate AI throughout the innovation process. We did

this throughout the entire innovation program:

- First, we created customized AI personas trained in the client's category. To build the personas, we used our proprietary SmartMarket AI Personas to represent different shopper segments. Then we conducted AI-moderated qualitative interviews to gain category-specific learnings to tailor the personas for the project.
- We leveraged these customized AI personas in ideation sessions to generate 100s of new snack ideas. This is one powerful benefit of AI Ideation – the number of generated ideas is limitless!
- We debriefed with clients prioritize ideas for consumer-testing, taking their internal strategic priorities in mind.
- After human-centered consumer testing, we again used AI to flesh out the ideas into full concepts.
- While the consumer testing was taking place, we also developed AI Buyer Personas, to represent who the client would need to sell the idea to at their key retailers. We evaluated the full concepts with the Buyer Personas to further optimize the ideas and help the team develop compelling sales stories.

SOCIALIZATION WORKSHOPS

These workshops are designed to socialize the insights among internal teams to build consumer empathy and understanding. We help clients immerse themselves in the research insights to internalize the takeaways. We achieve this in several ways.

Artifacts.

For example, we had one study where our goal was to forge a deeper connection with teens to inform our CPG client's marketing plan and messaging.

The project was longitudinal (we followed a group of teens for over a year) and multi-faceted, with an online hub, video blogs, social media monitoring, and in-person excursions. We culminated the project in an interactive work session. To further help the client team immerse into the lives of teens, we brought artifacts from the fieldwork into the session to provide a tangible connection to the target and what matters in their lives. These included:

- A program from a quinceañera that we attended with one of the teens
- A T-shirt from a peace rally against gun violence that we marched in with another teen

- Examples of their favorite snacks, drinks, clothing brands, etc.
- These objects helped to illustrate the lifestyle of our target and solidify who they are in the minds of the clients in a meaningful and compelling way.

Micromersions.

We can also enable your team to directly engage with consumers through “micromersions,” where we bring in consumers to the workshop for a moderated live panel and series of “speed dating” roundtable discussions. This type of workshop is ideal after a segmentation study to help the team fully grasp what makes each segment unique. We guide clients through this process with training on how to interact with consumers and a way to facilitate the conversation (e.g., notebooks, board games, etc.). By interacting directly with consumers, key stakeholder are able to more easily digest what makes each segment unique; they can connect the segment to real people. Overall, it makes the segmentation more memorable and easier for clients to keep the segments’ needs top of mind in their daily work.

Storyology Deliverables.

Another way to bring the research to life is through video and other creative deliverables produced by C+R Research’s team of Storyologists. In the teen study referenced above, we produced a video reel to share takeaways in the style of a Snapchat story, weaving in footage from our fieldwork, the vlogs, and real-life social media posts of the teens. The style of the video became meaningful in itself to demonstrate a key facet of the target’s lifestyles. We also created reports in the style of a magazine, with fun quizzes, top-10 lists, and interactive games to further help socialize the learnings among the client team.



POSITIONING WORKSHOPS

Here, we help translate the insights into how to refine a brand’s place in the market to ensure it reflects its core

strengths and addresses consumers’ needs in a way that’s resonant and contemporary. With this type of workshop, we explore the research from different points of view to go through the building blocks of a positioning, considering the target, their motivations and needs, the competitive context, and what makes the brand unique.

For example, we had a [client](#) who was at a crossroads and wanted to reinvent itself and reposition the brand to be primed for expansion into new categories and channels. After conducting internal stakeholder interviews and exploratory focus groups with consumers to identify category drivers and brand differentiators, we held a positioning workshop. The day-long workshop included a cross-functional client team and, after debriefing on the key insights, rounds of hands-on exercises to elicit a range of potential positionings.

First, we created personas inspired by the research participants. Each team had a different consumer vignette and were challenged to create positionings relevant to “their” consumer based on their unique attitudes, behaviors, and needs. Next, we looked at potential category extension—considering how the inclusion of different products could alter the frame of reference and relevant positioning. To combat an afternoon slump, we had a fun, energizing exercise of taking the brand’s core strengths and turning them into various superheroes to inspire new positionings. Throughout the session, we followed the design-thinking principles of divergence and convergence, landing on six unique and differentiated positionings (ranging from closer-in, more functional positionings to further-out, more emotionally driven ones). From there, we took these six positionings into qual focus groups for refinement and then validation in a quant survey. The result: a new positioning to guide the brand on its growth strategy.

Another [client](#) had recently acquired a small brand and wanted to reposition it to expand beyond its current niche target and focus more broadly on health-focused Millennials. We conducted an online immersion and shopping mission to understand the emotional and functional needs with this new target, and how they interact with the category and beyond. Then, we conducted a positioning workshop with the brand and agency teams. A key goal of the workshop was to explore the positionings in the context of where to place in them in the store. We used hula hoops to visualize the impact of the competitive set on the potential positioning. After we prioritized five positioning concepts at the end of the workshop, we optimized the language and brand imagery through a series of iterative focus groups and tested three of them quantitatively. We netted out with a singular positioning to make the product relevant and appealing to the target, and an understanding of how to execute against this positioning with packaging, messaging, and a sell-in story to gain distribution.



CLOSING

While the types of Activation Workshops vary by their desired goal, they all are effective in amplifying the learnings and enhancing the value of the research. They are meaningful, memorable, and, most importantly, engage stakeholders and help to gain alignment on implications and next steps. Activation Workshops are an efficient and highly effective way of increasing your return on research spending.

Want to know more?

Visit crresearch.com to check out the upcoming [webinar](#) on this subject and more information on our qualitative offerings.



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Kat Figatner is a Partner/Senior Vice President on the qualitative team with over a decade of market research experience. She moderates both traditional and digital qualitative research, including focus groups, ethnographies, shop-alongs, online communities, and mobile journals with consumers and B2B respondents.

In addition, Kat facilitates activation workshops and ideation sessions to guide clients in turning research insights into business strategies and innovation.

Prior to joining C+R Research in 2012, Kat worked most recently for MarketVision Research, based in Cincinnati, and Conifer Research, an ethnographic boutique consultancy in Chicago. Kat spent four years at Research International (which merged with TNS during her tenure), where she led large-scale global and domestic qualitative studies and early-stage innovation projects.

Kat holds a master's degree in the social sciences from the University of Chicago and is formerly the co-chair of the Chicago chapter of the QRCA (Qualitative Research Consultants Association). After receiving a BA in psychology from Haverford College, she taught English in Japan to junior high school students.

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