



MICHAELA MORA
Founder, Relevant Insights
@rinsights

I have worked on both client and agency side of research across multiple domains, using quantitative and qualitative data/insights to inform product decisions



HAS BEEN PART OF Product Development AND IN Market Research BUT NOT AS MUCH IN UX Research, WHICH IS MORE FOCUSED ON USER EXPERIENCE AFTER A PRODUCT OR FEATURE IDEA HAS BEEN APPROVED WHEN USED EARLIER, HELPS PRIORITIZE DEVELOPMENT DECISIONS

CONCEPT TESTING

TESTING OF IDEAS RELATED TO A PRODUCT CONFIGURATION, FEATURES AND BENEFITS BEFORE PRODUCT DEVELOPMENT, and COMMUNICATION MESSAGES BEFORE PRODUCT LAUNCH

The goal is to confirm there is a need for the product idea

IF YOU DON'T START BY DETERMINING WHETHER A PRODUCT IS NEEDED or NOT IT WILL FAIL TO ALIGN BUSINESS GOALS WITH USER EXPERIENCE

Michaela shows a QuickBooks example to illustrate CONCEPT ANATOMY

CONCEPT TYPES

PRODUCTS/SERVICES

What?

SPECIFIC FEATURES, FUNCTIONS, and/or VALUE PROPOSITION

POSITIONING

Why?

BENEFITS, MOTIVATION, HOW IS IT DIFFERENTIATED, BEHAVIORAL INSIGHTS

ADVERTISING

How?

COMMUNICATE BENEFITS OF PRODUCT & FEATURES, BASIS FOR MARKETING CONTENT REQUIRES 'Why'

CONCEPT TESTING TIPS

- USE IT TO CONNECT THE DOTS. BUILD YOUR BUSINESS CASE TO GET RESOURCES
- USE QUALITATIVE RESEARCH TO UNCOVER... VALIDATE IDEAS WITH CONCEPT TESTING. ITERATE.
- START WITH SIMPLE MONADIC TESTS. STRIVE TO USE TRADE-OFF APPROACH FOR BETTER QUALITY INSIGHTS AND DECISION-MAKING
- IDENTIFY THE TYPE OF CONCEPT TEST NEEDED. SEPARATE THE FEATURES, THE BENEFITS, and THE STORY TO GET ACTIONABLE METRICS!

When to use CONCEPT TESTING



NEW PRODUCT LAUNCH

- UNMET NEEDS • BEHAVIORAL CHANGES



REDESIGN, RE-LAUNCH

- COMPETITION • LOSS OF RELEVANCE • COMMODITIZATION

Time and competition, need for innovation, redesign product/service category to meet market conditions, imagine possible futures

Approaches

KEY CONSIDERATIONS

- Monadic vs. Multiple Concepts
- Analytical Approach
- Sample Population Frame Influences data collection and business decisions regarding channels
- Branded vs. Unbranded Branding of product can impact metrics
- Priced vs. Unpriced whether price is shown or not shown
- External vs. Internal Normative Data Risk of external norms not being specific enough

MONADIC

ONLY ONE CONCEPT IS SHOWN

PRODUCT

FEATURE

- Easy to implement
- Familiar metrics

- Lower discrimination
- Scale bias
- No competitive context (no alternative to new ideas audience is considering)

SEQUENTIAL

MULTIPLE CONCEPTS SHOWN ONE AT A TIME IN ROTATION

PRODUCTS

FEATURES

- TEST USING TEXTS/IMAGES
- CAN BE DONE w/ SURVEY TOOL
- USEFUL FOR LIMITED SAMPLE SIZE

- Sample cost saving
- Easy to implement

- Interaction effects one scene influences the next scene
- Lower discrimination
- Scale bias relies on rating questions

TRADE-OFF TECHNIQUES

MULTIPLE CONCEPTS SHOWN SIMULTANEOUSLY Powerful family of techniques MANY VARIATIONS

- Higher discrimination
- No scale bias
- Competitive context
- Sample cost saving
- Price testing
- What-if analysis

- Potential cognitive burden
- Harder to implement
- More specialized tools needed for analysis (higher complexity)

vs. vs.

MAX DIFF item scale
compare and prioritize multiple items (anything)
Greater for prioritizing feature backlog
CONJOINT ANALYSIS
combining features attributes into multiple concept choices for user (product configurations)

METHODOLOGY

All of the approaches are QUANT but our goal is to combine with QUAL techniques DO QUAL FIRST:

Qualitative RESEARCH

- EXPLORE RANGE OF BEHAVIORS, PERCEPTIONS, MOTIVATIONS, and ISSUES THAT DRIVE THEM
- FORMULATE HYPOTHESIS
- CAPTURE LANGUAGE USED BY PARTICIPANTS

- CONS: unstructured data and small samples make it hard to project larger discovering problems but not scale of them

Quantitative RESEARCH

- TEST QUALITATIVE RESEARCH HYPOTHESES
- FIND SUPPORT FOR GO/NO GO DECISIONS

OTHER APPROACHES

- A/B TESTING & web analytics
- DIGITAL ADVERTISING CAMPAIGNS (Google ads, etc.)
- OUTSIDE A CONTROLLED ENVIRONMENT
- CROWDFUNDING PLATFORMS