



## Insight: Using Concept Optimization to Gain Deep Customer Insight

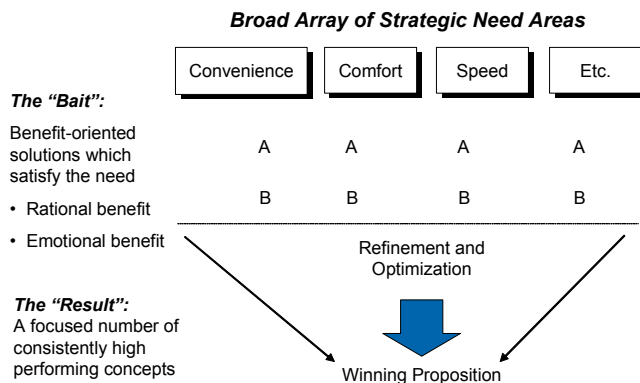
Obtaining deep customer insight is a critical component of successful marketing, and is often a source of competitive advantage. The most successful market-driven firms use a variety of techniques to gain this insight, often relying on non-traditional methods for obtaining deep understanding of their customer.

One such method is the use of *concept optimization research*, using “whiteboard” marketing concepts and thorough qualitative probing to elicit customer feedback.

### Concept Optimization – What is it?

Concept evaluation involves using customer feedback – obtained in a qualitative research setting – as a means of narrowing and *optimizing* marketing concepts in an iterative fashion. The objective is to identify a surplus of benefit-based marketing concepts and test them in written form before investing significantly in full development or implementation activities. This process can be used for a variety of strategic purposes, from positioning to messaging to new product development.

As shown below, customer need areas are used as a platform for developing statements, written to express the core benefit in slightly different ways. So for example, the benefit of convenience could be expressed a number of ways – time savings, ease of use, portability, etc.



### “Survival of the Fittest”

The concepts are then exposed to customers – one at a time – to determine overall appeal and probe specific areas of interest. Once individual concepts are explored, concepts are then compared against one another, to help determine which is the most preferred and why. This information is essential to refining and narrowing the list of ideas for subsequent copy refinement.

### Effective Concept Development

Concept statements should be written in a manner that stresses the *strategic benefits* of any given concept vs. creative writing appeal. While the copywriting should be neither boring nor bland, it is important to distill the idea down to its primary reason-for-being. In fact, executional “ad copy” should be avoided, as it may oversell an idea that doesn’t really have any consumer merit. Here is an example of a good, testable concept statement:

*Headline designed to capture the core benefit*

*Body copy explains the proposition more fully*

#### Sample Concept Statement:

**Brand X Financial Advisors . . . Now you Can Get Financial Planning Advice From a Company You Already Know and Trust**

If you need to plan for buying a home, paying your child’s education or a comfortable retirement, Brand X’s licensed financial planners can help.

They are personally committed to helping you achieve your goals by working with you to develop a straightforward, comprehensive plan that fits your lifestyle and your current financial realities.

Using a concept like this, the moderator then probes for understanding, overall appeal, and differentiation. As concepts are narrowed, there is more time in later groups to probe deeper on phrasing and specific support points.

### Concept Feedback and Optimization

Throughout the research schedule, customer feedback is incorporated in an iterative manner. In practice, this means active involvement of backroom participants in writing and revising concept statements – before, during and after individual focus group sessions.

Focus groups (i.e., a minimum of four groups per target) should be scheduled to allow enough time for concept revisions to occur between groups (usually a couple of hours between groups for debriefing results and then revising the concepts.)

The end result is a set of fully-optimized concepts that could then undergo quantitative testing, as necessary.

**For more information on Using Concept Optimization to Gain Deep Customer Insight please contact [Tim Koelzer](#) at EquiBrand.**