

DIGITAL MOMS

A RESEARCH COMMUNITY, *NOT* A PANEL

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PREFACE

This paper presents the origins, development, and refinements of the MomConnection website from the client's perspective: the client/supplier partnership, challenges to implementation of the panel, and general features of the panel. The website is then discussed in some detail, including its content and the user experience. Told from the supplier's point of view, the MomConnection panel is placed into the context of its utility as a powerful communication, research, and business tool. The paper concludes with a presentation of lessons learned.

CLIENT PERSPECTIVE

Background

The idea to build a consumer panel of moms took root at the Parenting Group (TPG) in 2002, as it was conducting a major branding qualitative research initiative. Focus group feedback from moms consistently pointed to a need for validation, to "be heard" and to connect with other moms. The business landscape indicated an opportunity for a brand to redefine consumer insights as an ongoing dialogue rather than a static, once-a-year, beautifully bound tome.

TPG had a history of conducting market-based research – unusual among magazine publishers, who tend to conduct surveys among subscribers to their titles only. TPG believed that establishing itself as the authority on the market as a whole would serve as a key differentiator in a highly competitive segment, and provide clients with more projectable – and hence, valuable – customer insights.

Carrying this philosophy forward into the new realm of online panels posed additional challenges, primarily in the area of recruitment. Both the cost of outreach and the legal implications of dealing with consumers with whom we had no previous business relationship were significant barriers to the project.

Some of the negative comments we encountered were:

- It's too expensive to recruit non-subscribers.
- Clients aren't comfortable with online panel results.
- TPG's web resources are administered by another business unit (AOL).
- Time Warner legal and security requirements are daunting.
- The sales force will resist using this as added value for clients.
- The editors will resist using this as a resource for content.

The project was championed by visionaries at the top of the TPG organization, who firmly believed that an intimate, sustained dialogue with the consumer would yield significant marketplace advantage, and that an online panel was the best way to facilitate that conversation.

Request for proposals (RFPs) went out late in 2002, with five vendors submitting proposals. Pricing varied significantly, as did size of the competing companies. It was felt that a smaller, "hungrier" group would be the best fit, in keeping with the entrepreneurial culture at TPG, and the more attractive pricing offered. A launch supplier was chosen in December.

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Recruitment began in May 2003, after five months of preparation to resolve trademark, privacy, spam, and liability issues raised by legal counsel. There was no dedicated digital staff at TPG to interface with the supplier, and the lines of authority and responsibility had to be determined as the project proceeded and new issues arose. The first survey was fielded in August 2003, to a panel of over 8,000 moms with children under the age of 12 years.

By mid-2004 it was clear that while the launch supplier was equipped to meet the needs of the typical panel, they were not a good fit for MomConnection. Recurring problems with response time and accuracy, often due to an under-qualified and overcommitted staff, led to frustration on both sides of the relationship. The launch supplier's small size meant it could not meet Time Inc.'s security standards, thus restricting growth into user experience-enhancing features such as message boards and chats.

It was agreed that the contract would not be renewed for 2005, and a new RFP went out. This time, the requirements for a MomConnection supplier were much better defined:

- Extensive experience in the management of panels;
- Resources to meet legal and security requirements;
- Staffing for a dedicated team to administer the panel;
- Ability to reduce response time to the bare minimum;
- Compatibility with TPG research team.

Again, five suppliers pitched the account, including one runner up from the first RFP, who came in second yet again. The winning vendor, RSG Inc., edged them out on the final point: we clearly spoke the same language, which suggested the makings of a better working relationship.

This time, the insurance, legal, and security standards were all met easily, and the turnover to the new server was smooth. In January 2005, a redesigned and enhanced website was launched, as well as a new, charity-based incentive program. The panel was refreshed, purged of low responders, and would now

be managed to a size of 5,000.

With over 200 surveys and polls fielded to date, MomConnection has become an integral part of TPG's business and editorial operations. The ability to turn research around in hours, from ideation to tabulation, is the cornerstone of its success, and is owed completely to the work that RSG has done to automate and streamline the back-end systems. Well, almost completely.

The other reason that insights can be gathered so swiftly is the engagement level of the panel members. We call MomConnection a *research community*, not a panel, because of that high degree of engagement. You can sense the level of involvement both from the feedback on the MomTalk message boards and the thoughtful, extensive answers to open-ends in our surveys. That energy infuses the community with an honesty and clarity that encourage members to share with each other and with us. We are careful not to violate that trust, and to provide an experience that gives moms what they need in return for their input on our surveys.

While launched primarily as an added value to leverage advertising page sales, MomConnection is now sold on an a la carte basis as well, as its track record in delivering actionable insights is well-established. It is a fluid, organic insight engine head and shoulders above traditional, static research studies.

Client/Supplier Partnership

There are two members of the core MomConnection team on the client side (director and manager of strategic insights) and six on the supplier side, including two contractors responsible for recruiting initiatives. A Web designer is hired to refresh the site design as needed and for email blast greeting cards for holidays.

A weekly status conference call ensures a forum for voicing observations, concerns, and ideas. The changeable nature of the schedule requires constant checking in on what's ready to go, what's on deck, and what's in the pipeline. Ideas for use of the panel are constantly being pitched, and can be on hold for months before a

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client decides it wants to move forward ... immediately. While telephone and email communication is ongoing, the status call mandates weekly attention to larger issues and discussion of activity on message boards and chats.

What cannot be mandated, the factor that makes this partnership work, is the shared sense of ownership in the project. The individuals involved all hold themselves to a high standard of professional performance, but beyond that have a common desire to push the limits of their individual areas of expertise and find new ways to make MomConnection “better.”

“Better” how?

- Better intelligence... direct line into the course of the consumer conversation;
- Better function ... more sophisticated, state-of-the-art software;
- Better experience for the community ... more responsive to their needs, and more enjoyable for them to engage;
- all of which contribute to better ROI.

Selling the Panel Internally and Externally

1. Internal

The key to selling the panel internally was having a visionary champion at the top of the organization and a passionate believer to execute that vision. The idea of research as central to the selling effort had to be instilled, and then the use of a new and relatively untested source of that research remained a hurdle.

The catalyst for the breakthrough was the emergence of research as a differentiator for TPG. Within the parenthood category, there was a dearth of innovation in gathering consumer insights, a tendency to oversegment the market and to overcomplicate the effort. Once TPG management chose this “direct line to the consumer” strategy, only MomConnection could deliver on that promise.

The advertising sales force was the toughest internal sell. They have precious little time in front of clients, and will choose only the most proven weapons in

their arsenal in the 30 minutes or so allotted for the average meeting. Further, they are used to leveraging added value somewhat liberally, with offerings that often have become commoditized, and hence, have little real value. It was essential in the process of selling MomConnection internally that the sales force be trained to understand both the hard cost *and* the street value of the research in order to maintain high perceived value.

It took several years for MomConnection to prove its worth, but now it is accessed by nearly every department at TPG:

- Business Development – guide strategy and portfolio management, decisions with profound impact on the shape of the business;
- Ad sales – add value with low hard cost that the competition cannot match;
- Marketing – substantiate programs and provide content for special sections;
- Corporate communications – generate timely, custom sound bites from a reputable source reporters will respect;
- Editorial – provide full surveys for features, quick polls for call-outs at low cost;
- Consumer marketing – test incentive ideas, added value for partnerships.

2. External

When MomConnection was built, there was some resistance from the advertising community regarding the use of online panels, primarily regarding projectibility to a non-Internet population. Non-endemic marketers in particular did not know or believe that moms as a group were over-indexing in their use of the ‘net. Now however, with penetration in the United States at 70% (overall 55% have broadband), and many third-party sources measuring sky-high rates of use by moms of young children, this is rarely a problem.

The bigger challenge is to communicate the market-based nature of MomConnection to prospective clients. The fact that we are not simply leveraging existing email lists of our customers to build the panel is so unusual

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that it is hard for many clients to accept. Further, they are so used to magazines giving away added value indiscriminately that it has taken some time to instill a respect for the infrastructure cost of maintaining the panel and its value as an insight engine.

The pitch deck used for the external sell has evolved over the years, but the most frequently used format is a “two pager” sent to clients by email that details the benefits of MomConnection versus other online research resources:

- The most timely information on the mom market;
- More accurate projections to total U.S. than reader panels;
- Better response and screeners than email lists;
- Controlled use reduces the respondent fatigue of national survey panels;
- Single-subject surveys result in well-considered responses;
- Focused environment, unlike website panels which allow promotions and ads;
- Community environment promotes trust and sharing;
- Research specialists available to assist in questionnaire development as needed;
- Accumulated wisdom leads to more efficient and effective use of survey time;
- Parenting/Babytalk brands as door-openers.

Hitting critical mass with a range of case studies to share was central to making the pitch more compelling.

Finally, the many ways to leverage the panel were easily incorporated into sales collateral copy for marketing MomConnection applications:

- *Quick Polls*. Find out what mom is thinking – *fast*. Quick Polls give you answers in hours, so you can gauge response to events and news, and meet even the tightest deadlines.
- *Full Surveys*. Use Full Surveys to probe moms’ purchase decision influences or brand preferences, and to collect attitudinal, behavioral, and market trend data.
- *MomTest Lab*. The most immediate real-world product testing, timed to coincide with the in-market customer’s

needs. An example: MomTest Lab made Similasan eardrops the hero when moms looking to relieve their children’s earaches opted to receive ear pain drops overnight.

- *Word of Mom Viral Marketing*. From the playground bench to the PTA meeting, moms share information, opinions, and advice with each other more than any other consumer group. TPG will open the door to the word-of-mom network by enlisting our MomConnection members as your brand evangelists.
- *Trend Scouts*. What’s now? What’s new? What’s next? If you need to know, talk to our Trend Scouts, moms we’ve recruited to give us real-world insights into marketplace activity.
- *Mom U*. TPG creates on-site seminars tailored to your business category and needs: marketing information seminars, brainstorming sessions, lectures, results of custom research, primers on panel building, and more.
- *Mom Meter*. Test your copy and creative communications with moms, via any medium that can be served online – print, TV, radio, mobile, and more.
- *MomTalk*. Talk to her: Frannie, MomConnection’s trusted panel administrator, will introduce a discussion thread on the MomTalk message board on your behalf, allowing you to receive feedback and verbatims directly from moms.
- *Mom Matters*. Our established and respected B2B e-newsletter can be customized and co-branded for trade shows and sales meetings.
- *In Her Own Words*. Use verbatims from MomConnection’s message boards, chats, and polls to add depth and texture to your insights.

Features

1. Panel administration

Frannie is the “face” of MomConnection to the panel. This was the name of the first full-time administrator assigned to the research team, and the name was kept when a new staff member took over that role in 2006. Keeping one administrator’s name in perpetuity made sense to everyone on the team.

Equally obvious – but worth covering – is the need for consistent cleaning and purging. Handling bounces, both

hard and soft, as they occur, and purging low responders on a regular basis are both in the MomConnection handbook. When the membership surpasses 5,500 (roughly every six months), we email the 500 moms least likely to have participated in a survey, allowing them to voice their desire to stay before we purge them.

2. Moms making a difference incentive

In its early iteration, MomConnection used incentives such as sweepstakes and gift cards, which required an inordinate amount of effort to administer and acquire. Given our understanding that moms want to give back but are pressed for time, we decided to offer an easy way for them to do so:

- Select four well-known, national charities that work to improve the lives of moms and kids;
- Donate a fixed (hence, predictable, controllable, and budget-able) amount of money at the end of the calendar year;
- Allow moms to vote for one of the charities each time they complete a survey or poll;
- Prorate those votes to determine the amount given to each charity.

The size of the donation was equal to the total amount spent in the previous year for the sweeps and gifts. We saw no fall-off in response rate, had no push-back on our choice of charities, and were able to direct more energy to collecting and analyzing insights than to administering incentives – a far better use of human resources.

3. MomTalk message board

The MomTalk Board was launched to provide members with a channel to connect with each other, another consumer need that TPG had uncovered in its own branding research.

Several team members check the boards regularly in the course of looking for threads about particular subjects, but it is essential to have someone assigned to do so daily. Despite the availability of an alert mechanism by which members can let us know if there is any thread

of concern, we prefer to patrol on our own as well, to become aware of potential issues and pro-actively discuss response options. This has brought to light situations where people join in order to use the site as a selling channel, or for their own research recruiting purposes, and cases where there are discussions simmering on potentially contentious matters such as politics, religion, or race.

Our philosophy has been to remind members that the purpose of MomConnection is to provide support and validation for moms, and that there are many sites available where divisive issues can be debated. Oftentimes, we find that the members themselves police these situations organically, without much involvement from us at all. The following quotes illustrate the tone and range of comments from actual members:

- *I do believe this is a thread about what we wished we'd have known before kids ... not a thread to throw down on people! I try to avoid negative posts, but that was very uncalled for and unnecessary!*
- *There's no room for out-and-out rudeness on these forums. Differences of opinions are always accepted when presented in a positive manner and without belittling those we might disagree with. Please play nice and take the time to think about how you are wording things.*

There is a discussion section dedicated to feedback on MomConnection itself, where suggestions from members have led to changes and additional features on the site:

- *I know there's a forum related to your relationship with your partner AND your children, but I think we should have one about your children's relationships with their siblings. A lot of mothers have problems with sibling rivalry and given the opposite situation, sibling separation. If this were to be added onto MomConnection, it would help another handful of mothers with this issue. Thanks.*
- *Hi Frannie. I've spoken with many moms in the Chatroom who have teenagers. I was thinking maybe put a separate Forum in for Moms of Teens so we can discuss our teen issues.*

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• *How about adding a New Arrivals section? I just thought it would be nice to have a specific place to go to see who has had babies and/or been born.*

Another permanent area is that for technical questions about using the boards, most often having to do with photo uploading, accessing chats, profiles, and the like.

SUPPLIER PERSPECTIVE

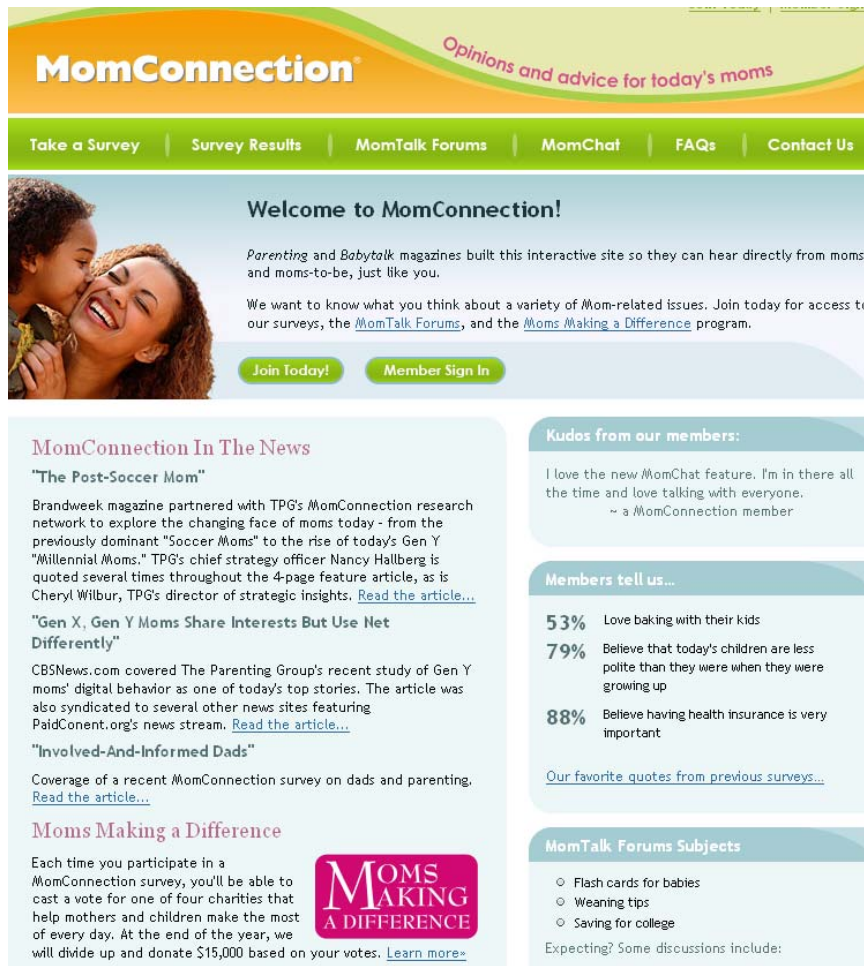
Introduction to the MomConnection Website

RSG has been working with TPG since 2005 to manage and maintain the MomConnection online panel. The panel is actively managed to a size of 5,000 – 6,000 members and is open to mothers with children under the age of 12 years and mothers-to-be. The cornerstone of MomConnection’s success has been continuous monitoring, review, and improvement to:

- Maintain an active and engaged panel membership;
- Put tools into the clients’ hands that give them access to the information they most often use and need;
- Reduce time to field and potential for errors;
- Build in tools that enable administrators to perform tasks on the website without intervention from IT professionals.

Since its launch in 2003, MomConnection has had three looks, each with progressively improved navigation, accessibility, management and reporting tools, and database functionality. A look at the home page (see figure 1) reveals an engaging, dynamic website with a number of notable features. A rotating series of photographs of young children and mothers and bright, cheerful colors set the tone for our members’ experience.

FIGURE 1



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The home page comprises seven sections:

1. Header and Navigation Bar
2. Administrator Toolbar
3. Using Results
4. Incentive Program
5. Feedback from Members
6. Recent Results
7. Active Discussions in the Forum

Once they enter the website, members who are logged in are greeted by name. Members can use the navigation bar to access new surveys, real-time results from current surveys, the MomTalk forums, MomChat chat rooms, FAQs, and contact information.

In most cases, members access surveys via a password-embedded link in an email invitation. However, sometimes members who go to the website to visit the forum or the chat room may want to access a survey from the home page via the "Take a Survey" button. A new feature on the website alerts members to open surveys that they haven't yet completed. Non-members who click on this button are redirected to a page inviting them to complete a profile to become a member. If more than one survey is available, a link directs them to a page that itemizes the open surveys. While we encourage members to take surveys as soon as they can, this feature allows us to continue to collect responses, and improve our response rates, for surveys that do not need to close by a particular date. It also serves to engage new members in a survey immediately after they complete the initial profile questionnaire.

It's important for members to understand how the results of surveys they participate in are used, and a section on the home page is devoted to providing that information. Members interested in reading beyond the teaser information included on the home page can click on a link to download PDFs of articles that made use of data from a MomConnection survey. Recent "MomConnection In The News" features include a *Brandweek* article on Gen Y moms, a CBS.com news article on moms and Web use, and an *Adweek* article on fathers' involvement in parenting.

Just below this section on the home page is a brief description of the incentive program – Moms Making a Difference – that donates money to four charities distributed in proportion to votes cast by members who complete surveys. A link takes members to a more detailed description of the program, the four charities, and the current distribution of votes. The pie chart (figure 2) illustrating the vote distribution is linked to the database and updated automatically.

The right side of the home page is devoted to features involving feedback from members, survey results, and current discussions in the MomTalk forum. Using features accessible in the administrator toolbar (figure 3) team members can enter content into the database through a series of text boxes on a Web-based form. Every time the home page is refreshed, phrases are pulled at random from the database and inserted into the fields on the home page. In this way, home page content is relevant, up-to-date, and dynamic without the intervention of a Web designer. Members can check the home page to get instant updates on recent survey results and active discussions in the forums.

Providing clients with tools to access panel information is critical in a fast turnaround, 24/7 environment. The administrator toolbar gives the client team access to up-to-date detailed panel statistics, including counts by day for new members, so they can monitor the overall health of the panel and the impact of recruitment efforts. Team members can also view:

- Survey chronology, including questionnaires, number of invitations, and response rates;
- Survey tabulations and charts dating back to 2005;
- MomChat log files;
- Video files submitted by members.

Detailed in a later section, the weekly status call keeps all team members up to date on current, imminent, and future survey activity. Despite this organizing framework, the need to field a survey with little to no advance notice occasionally emerges. MomConnection's polling feature enables team members on the supplier side to program and launch a short (1 - 5 question) survey within a

FIGURE 2

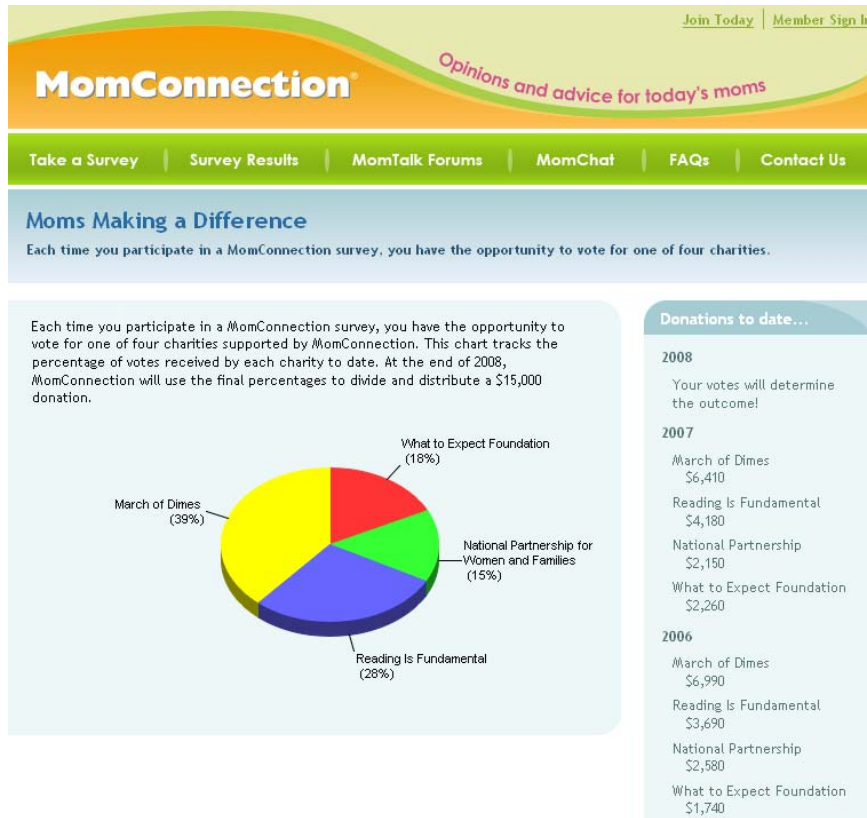


FIGURE 3



matter of hours. These surveys are automatically integrated into the panel reporting system and results are available within minutes of launch.

The MomConnection team works diligently to build and maintain a community that keeps members engaged in both the research and social venues. The MomTalk forum currently features 43 topic areas, including Advice, Pregnancy, Parenting, Relationships, and Photo Sharing. Members can customize their profile, private message each other, and self-monitor using an alert system.

As we illustrated earlier (MomTalk Message Board), members take the forum “rules” seriously and have used the alert system – justifiably – when they’ve noticed offensive, controversial, or sales-related posts. There is also a section for MomConnection feedback where ideas for several useful improvements have been born. In fact, the forum has recently undergone a reorganization based on feedback from its members.

Virtually all panel communication with members occurs via email so maintaining a good reputation with ISPs

is critical. Any supplier who communicates with large groups of people via email has to avoid sending emails that get blocked, flagged as spam, or delivered to bad or unused mailboxes. We employ a number of procedures to ensure high delivery rates:

- Double or confirmed opt-in whereby a confirmation email is sent to the subscriber that requires clicking on a link to safeguard against those who might sign others up accidentally or out of malice.
- All emails include three essential points for recipients: why they are getting the emails, who they are from (including a physical address), and how can they stop receiving them.
- There is a Remove link at the bottom of every email for instant removal from the database.
- All emails are sent from a real email address that members can reply to.
- Every email has a consistent look and feel that is coordinated with the MomConnection website.
- RSG uses an online service to check email against popular spam filters, verify proper email rendering in major email applications, and monitor delivery rates to the largest ISPs in the United States.

Partnering with the Client

Panels come in a many different shapes and sizes, and although MomConnection may not be the largest panel in terms of membership, it's a high-touch panel with regards to both members and the client team. With new research activities occurring every week, the weekly status call ensures that nothing falls through the cracks. Managed by a dedicated panel manager on the supplier side, the agenda and meetings notes follow the same format each week: marketing/recruiting, website updates, and ongoing and upcoming research. Without this commitment of time from the client, MomConnection could not be as effective as it is.

A particular strength of MomConnection is the combined expertise of the team – that is, the client's thorough familiarity with the mom market from both a content and research perspective, and the supplier's extensive experience in advanced research methodologies.

Through this collaboration, the client team can offer its partners and clients research solutions to answer any question.

Frequent communication and a shared sense of commitment and vision have contributed to a strong bond between client and supplier where a deep understanding of the client's and the end users' needs enables the supplier to provide actionable research. Additionally, in times of turmoil (e.g., difficulties with the original panel manager and a marketing and communications subcontractor), the team was able to work closely to identify and correct the problem.

Responding to Evolving Business Needs

Often driven by budget constraints, many community-based panels launch with a limited set of features and expand as budget allows and/or the panel gains traction. At a minimum, most clients would require at least basic survey tools as well as FAQs and contact information. The MomConnection was no exception in its earliest incarnation. Once the organization experienced the benefit of a quick turnaround and customizable research tool with immediate access to its target market, phasing in new features and capabilities became feasible.

The MomTalk forums grew out a number of needs – increase survey response rates by getting members to invest in the community, observe the types of issues moms need help with and like to discuss with other moms, and occasionally plant an idea on the forum to see how members respond. Once members got a taste of communicating directly with other members, they requested a chat room feature. While it hasn't been used for research purposes to date, the chat room provides the client with a tool to get into open (synchronous) discussions with members.

The in-home sampling and viral marketing programs (MomTest Lab and Word of Mom) came from market-place demand, with marketers looking for ways to get product into consumer hands in ways beyond mass, untargeted channels. The desire to reach the "influencers" within demographic segments, and have those consumers become "brand evangelists," has been

growing and has prompted the development of these MomConnection functions.

Most recently, the evolution of YouTube and user-generated video content led to MomConnection's MomTube program, where we ask our members to video themselves and their environments in response to specific questions. In preparation for one major client pitch, we were able to collect 27 MomTube submissions (three were off topic, so only 24 were considered valid) in 21 days. The videos ranged from 30 seconds to a couple of minutes in length. In such cases, a more direct incentive structure is employed.

Combining Research Methodology and Panel Technology Extends Capabilities

The panel has a set of built-in features that automatically updates the member database so that trimester information for pregnant members and ages of young children are advanced to ensure accurate accounting of quota cells and targeting for survey invitations. In addition, members are invited to update their profile information on an annual basis. Live tracking of the profile data enables the client to assess sample sizes prior to committing to research.

Response rates are closely tracked and non-participating members are purged quarterly. Twice a year an analysis of response rates is performed to look into who's responding and who's talking in the forums. We also evaluate response rate by how the member was recruited to determine if recruiting budget is being used effectively.

MomConnection typically sends out a short survey each week and a longer, more in-depth survey each month. Short surveys are limited to a single page – that is, no skip logic and can make use of all standard question types while the more in-depth surveys are fully customizable. A recent improvement to the survey tool provides the panel manager with the ability to manage field operations from a web page.

MomConnection has built-in capabilities for testing copy and creative content in any format (JPG, audio,

video). In some cases, a split sample is used to evaluate multiple ads monadically.

Meeting Members' Needs

The MomConnection team sets a high standard for treating members responsibly and respectfully. In exchange for participating in surveys, members enjoy several benefits:

- Realize a sense of accomplishment in affecting the distribution of a sizable charitable donation;
- Be part of a community where they can make friends and connect with other moms;
- Test products and provide feedback;
- Participate in an ad-free environment.

Members can count on a timely and personal response to emails they send to the panel manager. Veteran members are sometimes called on to evaluate new panel features prior to a full-scale launch. In addition to the alert function that enables members to report on suspicious or offensive behavior in the forums, team members monitor the board daily. A short report, "Overheard on MomTalk," summarizing forum discussions is submitted to the client every week.

We are indebted to our members for all the valuable insights they provide. As a small token of our appreciation, each year they are sent specially designed Mother's Day and holiday e-cards. On occasion, members are offered additional incentives, such as gift cards, when asked to participate in research that requires more of their time.

Finally, there sometimes comes a time when members decide to end their relationship with MomConnection. The unsubscribe link at the bottom of every email communication immediately removes retiring members from the system.

Reducing Timelines

The survey system described in this paper is continuously evaluated and improved to increase efficiency and shorten time-to-field. Survey testing follows a strict protocol so time isn't wasted fielding a survey

with programming errors. Instant results provide the client with critical and time-sensitive information at their fingertips.

Lessons Learned

1. Bigger is not better.
 - 5,000 provides large enough cells in post-analysis for most purposes.
2. A branded site is important, but the integrity of the brand must be protected.
 - Recruiting through blogs is risky.
 - Legal and privacy issues that apply to the mother brands must be respected.
 - Brands' own content sites that cannot be cannibalized.
3. The initial investment does not drop significantly in subsequent years.
 - After recruitment, development costs continue to be incurred for retention.
 - Cannot coast; must update, freshen, innovate.
 - Continuity of the team encourages sense of ownership.
4. Respect for panel members is critical.
 - Neither exhaust nor neglect them.
 - Respond to their needs.
 - Give them feedback about the impact of their input.
5. Keep pace with client needs.
 - Go out of your way to help your client succeed in their job.
 - Keep your toolbox well equipped to address any research need that arises.
 - Never get complacent; panel technology and methods are evolving and you have to stay current.
6. Email marketing expertise is in order.
 - Understanding ISP filters as well as tracking and responding to bounces are essential to reducing churn and controlling recruitment costs.
7. Speed trumps all.
 - Ability to react to short turnarounds creates market advantage.
 - Recognize reality of today's marketplace.

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