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Building Your Insights Community RFP

Questions to Ask

1. COMPANY BACKGROUND AND EXPERIENCE

This section sets the baseline. You're not just looking for credentials. You're looking for evidence of genuine expertise with programs that resemble yours in complexity, scale, and strategic ambition.

Ask:

- Describe your experience managing proprietary branded insights communities for ongoing quantitative and qualitative research. How many active communities do you currently manage and at what scale?
- What industries and research objectives do you have the most experience with? Provide two or three case studies that demonstrate your work on complex, strategically significant programs.
- How is your company structured, and who owns it? Has your ownership changed in the last three years?

2. TEAM STRUCTURE AND ACCOUNT MANAGEMENT

This is the most important section in your RFP and the one most organizations underweight. The account team is what separates a strong community partnership from an average one. Ask more here than anywhere else.

Ask:

- What is the structure of the account team? How many people will be on the account and what are their roles and responsibilities?
- Who would be our day-to-day account lead, and what is their background?
- How many client accounts does each team member currently manage?
- How do you ensure continuity when a team member leaves? What systems exist for documenting and
- transferring institutional knowledge?
- How do you approach the learning agenda proactively? Can you give an example of a time your team shaped a client's research strategy in a way the client hadn't anticipated?
- What is your employee retention rate for client-facing researchers?

3. COMMUNITY HEALTH AND MEMBER ENGAGEMENT

This is one of the most underrated dimensions in any community evaluation, and one of the most telling. A community is only as good as its members' willingness to show up, engage honestly, and keep participating over time. Poor community health is a slow leak that quietly undermines everything else.

Ask:

- What engagement rates do you typically achieve in communities?

- How do you recruit initial community members, and from what sources? Do you recruit from client CRM lists, third-party panels, or both?
- What is your approach to ongoing member refresh? How frequently do you replenish the community an what triggers a refresh cycle?
- How do you manage panel fatigue? What limits do you place on survey frequency and length, and how do you monitor member burnout signals?
- What does an example engagement plan look like?
- What incentive structures do you recommend, and how do you manage and distribute them?
- How do you ensure representativeness over time as the community evolves?
- What KPIs do you use to monitor community health, and how do you report on them to clients?
- How do you handle members who become disengaged over time?

4. PLATFORM AND TECHNOLOGY

Platform questions are necessary but shouldn't dominate your evaluation. The technology needs to meet a minimum threshold of capability, then the other dimensions determine the real winner.

Ask:

- Is your platform natively built or assembled from third-party integrations? What are the limits of its analytical capabilities?
- What is the largest community currently on your platform, and what scale does your technology support?
- What quantitative methodologies does your platform support natively? Look and listen for MaxDiff, conjoint analysis, TURF, and advanced segmentation.
- What qualitative tools are available? Look and listen for video responses, bulletin boards, mobile missions, and AI-moderated conversations.
- How frequently do you release platform updates? What were the three most significant updates in the last twelve months?
- How do you ensure data security and compliance? Describe your handling of personally identifiable information.
- What integration capabilities exist with CRM systems?

5. AI CAPABILITIES AND INTELLIGENCE INTEGRATION

This section separates 2026 providers from those still operating on a pre-AI model. It's also where the most overpromising happens, so probe hard.

Ask:

- How is AI currently being used in active client programs today? Provide specific examples, not roadmap descriptions.
- Do you offer AI-moderated qualitative research at scale? Can we see an example of a study that used this capability?
- Can your platform connect community insights to external intelligence sources such as social media, product reviews, search behavior, and news? How does that work in practice?
- How do you use AI in open-end coding, synthesis, and reporting? What does a human researcher's role look like alongside those AI tools?
- How do you approach knowledge management across a multi-year community program? Can stakeholders across our organization access and query cumulative community insights?

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6. RESEARCH CAPABILITIES AND METHODOLOGY

A community is only as valuable as the range of research it can support. This section tests whether a provider can genuinely match methodology to question or whether they default to the same study designs regardless of the objective.

Ask:

- Walk us through how you approach study design when a client brings you a complex, ambiguous business question. What does that process look like?
- What advanced methodologies have you introduced to clients in the last year that they hadn't previously used?
- How do you approach hybrid studies that combine community primary research with external intelligence sources?
- What qualitative capabilities do you offer beyond standard surveys and discussion boards? Include your approach to longitudinal research, projective techniques, and behavioral data integration.

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7. REPORTING, STORYTELLING, AND ACTIVATION

Research that doesn't travel isn't research. This section evaluates whether your provider produces work that drives decisions or work that fills hard drives.

Ask:

- Please provide two or three real deliverable examples from programs with genuinely complex business questions. Not sanitized samples.
- How do you tailor deliverable formats for different stakeholder audiences, from insights teams to C-suite presentations?
- What capabilities do you have for data visualization, video highlight reels, and executive socialization materials?
- How do you ensure findings include clear strategic recommendations, not just data summaries?
- What does your quality assurance process look like before a deliverable reaches the client?

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8. PRICING AND FLEXIBILITY

Pricing conversations are uncomfortable to have upfront but expensive to avoid. Get into specifics here.

Ask:

- Provide a comprehensive cost breakdown covering setup, ongoing community management, and research services separately.
- How is your pricing structured? Do you use a credit-based model, a fixed retainer, or project-based billing?
- How does your pricing model flex when our needs shift mid-year, either up or down?
- What is included in the base price and what incurs additional cost?
- Are there capabilities or staffing elements built into the base price that we may not use?

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What to Look For

1. COMPANY BACKGROUND AND EXPERIENCE

Specific, relevant experience with programs that match your needs. Be cautious of providers who can describe their platform fluently but struggle to tell you about the research work itself. Ownership questions matter because private equity acquisitions and agency consolidations have a quiet but real effect on service quality and investment priorities.

2. TEAM STRUCTURE AND ACCOUNT MANAGEMENT

Team members managing no more than two or three accounts each. A specific, credible answer about knowledge transfer, not a vague assurance that it hasn't been an issue. And evidence of genuine consultative behavior, not just execution capability. Ask the account lead these questions directly during presentations. How they respond tells you more than what's in the written proposal.

3. COMMUNITY HEALTH AND MEMBER ENGAGEMENT

What to look for: A clear, proactive approach to community health and member refresh that isn't reactive to problems. Incentive structures that reward quality engagement rather than just participation volume. And honest answers about what happens when community health starts to slip. A provider who can't speak to their health metrics probably isn't tracking them closely enough.

4. PLATFORM AND TECHNOLOGY

A platform that handles both sophisticated quant and rich qual natively. Active, specific evidence of ongoing development. If a provider struggles to name three meaningful recent updates, the platform is probably coasting.

5. AI CAPABILITIES AND INTELLIGENCE INTEGRATION

Concrete current examples, not promises. A clear articulation of where AI is doing the work and where human researchers are still essential. The ability to connect community data to real-world intelligence is a genuine differentiator. If a provider can't speak to it at all, they're behind the curve.

6. RESEARCH CAPABILITIES AND METHODOLOGY

Evidence of methodological curiosity and range. Providers who can describe specific advanced studies they've designed for clients are more credible than those who list capabilities without examples. If every program sounds like a survey with a discussion board attached, that's what you'll get.

7. REPORTING, STORYTELLING, AND ACTIVATION

Deliverables that tell a story and make a case, not just report findings. If a provider can't share real examples without heavy caveating, that's a signal. The best partners will hand you work they're genuinely proud of.

8. PRICING AND FLEXIBILITY

Transparency and flexibility. Credit-based or modular pricing models tend to work in the client's favor over a multi-year contract. Watch for base prices that include extended specialist teams, organic community monitoring, or platform overhead that you won't actually use. The best providers can explain clearly what drives their cost and what you can adjust.