
B2B and Niche Audience Case Studies

- **Client Services Interviews**
- **IT Program Evaluation**
- **Niche Consumer Target Understanding**



Client Service Interviews

A B2B insurance carrier wished to better understand their client service practices and study the decision-making process affecting both client defection and attraction, assess the competitive environment and improve the entire continuum of their client life-cycle—from new business development and account management, to claims and program services, to drive strategic and systemic improvements.

APPROACH

W5 recommended a series of executive interviews with CFOs and other executive-level managers with day-to-day knowledge of the client relationship. Instead of highly structured and formal interviews, W5 employed a conversational approach designed to allow participants to guide conversation flow, highlighting issues they found to be important. W5 applied this qualitative approach to both new clients and recently lost clients.

RESULTS

The carrier has made this approach part of their customer service process, using the interview results in sales training, client service reengineering, and to re-engage lost clients. The results are also used within the executive suite to review key company initiatives to help reduce the amount of churn in client renewals.



IT Program Evaluation

The client was interested in gauging the awareness and value proposition of a program designed to aid IT companies in providing validated solutions to their customers among current and potential program members.

APPROACH

W5 conducted numerous qualitative telephone interviews across six countries worldwide, including the United States, Russia, Germany, the United Kingdom, PRC, and India to understand the benefits of and barriers to adopting and implementing the client's program.

RESULTS

The client gained an understanding of both current and potential members' awareness and usage of the program. The research enabled the client to evaluate their program's offerings and understand how they may be augmented to further benefit members, remedy newly-discovered unmet needs and create more interest among potential members.



Niche Consumer Target Understanding

A banking and financial services company looked to better understanding a narrow, but key demographic of their consumer base: young families. Insight into this group would help the client focus their messaging and refine products and services.

APPROACH

W5 recommended a dual-phased qualitative approach to guide the client's understanding of young families' banking behavior and needs. W5 consultants conducted an initial secondary online research phase to capture general trends and perspectives that families share in banking and financial management. This was followed by a second phase of qualitative focus groups in two key markets to obtain more detailed insight into the behavior and attitudes of this narrow demographic.

RESULTS

During the course of this engagement, W5 was able to identify and highlight emerging trends in banking behavior and financial management strategies, including branch interaction, key communication channels, and use of technology. These results were able to guide the client in their development of customer messaging and collateral, integration of new online banking features, and development of improved customer-facing strategies.



About W5

W5 is a boutique custom marketing research firm. We focus on answering **who, what, when, where, and why people relate to products, services, and brands. W5 combines the professional services offered by marketing research firms, strategy-oriented management consultancies, and brand planning agencies.**

Our approach: We believe in developing custom plans of action that result in helping clients make decisions to accomplish their goals. Rather than simply delivering data as the culmination of a research engagement, we produce sound and creative solutions for our clients. W5 prides itself on bringing client and consumer closer together.

Clients and industries: Our clients represent a broad spectrum of vertical industries and include both Fortune 500 companies and advertising agencies. While we are by no means limited to any particular set of industries, we maintain a focus on consumer goods, healthcare, technology, financial services, and casual dining and quick service restaurant.

Consulting worldwide: W5 consultants are expert packers. We work all over the world, always ready to go where your business needs might take us. We are not limited by insular product offerings. Our custom approach to each engagement means we work with you to establish the right location and the right tools and technology to get the job done. In person, online, around the world.

Diverse skills: W5 consultants hold a diverse set of skills, experience, and interests that yield harmonious collaboration with each client and each other. No two engagements are the same, but all flourish with the creativity and curiosity that unite our staff.

Research, Strategy, & Planning: Research delivers the insight you need to make decisions. Strategy is the map for navigating the business environment. Planning constructs the specific tactics that drive brand and messaging initiatives. Research without defined strategic objectives or communications planning falls flat. Strategy is great but requires research as fuel. Planning pulls it all together and prepares you to speak directly to the consumer.

RESEARCH

Qualitative

Brand Positioning
Concept Testing and Development
Consumer Experience Understanding
Ethnographic and Social Context Research
Message Development
Online Behaviors and Conversations
Retail and Environment Research
Trend Spotting

Quantitative

Attitude and Usage
Concept Evaluation
Conjoint Analysis
Copytesting
Pricing Analysis
Product Evaluation
Segmentation
Strategic Tracking

STRATEGY

Competitive Assessment
Meta Analysis of Existing Data
Strategic Consulting
White Papers
Workshops

PLANNING

Brand Books
Brand Positioning
Concept Development
Creative Briefing
Design Driven Deliverables
Ideation Sessions
Personas

Even when we don't get the opportunity to help a client with all three, we're thinking about the larger puzzle. We help put the pieces together.





W5insight.com

W5blog.com

twitter.com/W5insight

If you have a project in mind or would like to discuss your specific business needs, we can be reached by phone at (919) 932-1117, or you can email Tom Daly directly at tdaly@W5insight.com.