

# Getting Started with AGILE RESEARCH

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# 01. What Does Agile Research Provide?

## Defining Agile Research

Agile Research empowers your team to quickly design, collect, and distribute critical research, keeping you ahead of the curve without disrupting your existing MX or EX programs. This self-service tool allows your team to create and distribute branded, one-time or as needed research surveys using over 20 question types. As responses come in, instantly analyze and share results with dynamic reports, custom dashboards, data exports, and automated response notifications, all from one unified platform.

## Best Uses for Agile Research

### Understanding Research Based Surveys

Research-based surveys leverage advanced question types to find facts and patterns with a sample size representative of a larger population. Agile Research allows your team the ability to survey both members and non-members alike in order to gain broader insights on behavior trends and conduct hypothesis testing through as-needed use. These surveys require careful planning and parameters to maintain reliability of findings.

### Common Use Cases

- Gathering Sentiment Related to Proposed Mergers & Acquisitions
- Market or Competitor Research
- Marketing Research (including Brand Perception, Messaging, Ad Testing)
- Consumer Preference and Behavior Research
- Persona Development and Segmentation
- Product Development
- Ideation and Proof of Concept
- Focus Group & Advisory Board Recruiting and Research
- Financial Health & Wellness Check-Ups
- Event or Course Feedback

# Custom vs. Agile Research

Feature	Custom Feedback Surveys	Agile Research Surveys
Usage Type	On-Going, Event Triggered	Limited Time, Project-Specific
Builder	MLG	Credit Union
Timeline	4 – 6 Weeks	On-Demand
Advanced Question Types		✓
Scheduled Survey Distribution	✓	
Send Via Email, Link, or QR Code	✓	✓
Embedded Media Options		✓
Live Updates Post-Launch		✓
View Incomplete Responses		✓
Maximum Custom Data Elements	75+	20
Data Sources	SFTP, API	API, Manual
Non-Member Panels Available		✓
Automated Scrubbing for 90 Day Quarantine		
Automated Scrubbing for Member Opt-Outs	✓	
Alerts	✓	✓
Automated Topic Tagging	✓	
Included in Benchmark		
Metric Reporting in Medallia	✓	
Customized Reporting Options		✓
Report Sharing via Hyperlink		✓
Set Maximum Number of Responses		✓

## Special Considerations

### **Responses and reports will not appear in your existing Medallia dashboards.**

Responses will appear in the Agile Research application within the Medallia platform. You will not need a separate log-in to access the application. There is more information about how to access the application in Section 2.

### **Scrubbing for opt-outs and standard quarantine logic must be done manually.**

Because Agile Research is a stand-alone application within Medallia, there is no automated scrubbing for members who have opted-out or who would otherwise be quarantined. The process of removing affected members must be manually completed prior to sending survey invitations. For a list of members who have opted-out, email MLG's support team.

### **Text analytics and sentiment tagging are manual processes within Agile Research for open-ended feedback.**

There are no predefined topics that exist within Agile Research for automated text analytics and sentiment tagging. The text analytics capabilities that exist for your standard survey programs do not apply in Agile Research.

### **There is no scheduler to regularly send survey invitations.**

When your survey is ready to launch, the invitations are sent manually within Medallia. There is no option to schedule the invitations to be sent at a future date, or to automate regularly sending invitations.

### **Alert follow-up tracking does not exist in Agile Research.**

The focus of Agile Research is to provide an easy way to create research-based surveys. As the nature of these survey differ from a standard VOM survey, there is no alert tracking within Agile Research.

### **Every credit union will be allowed a set number of free invitations in Agile Research.**

There is no increased cost to begin using the basic features of Agile Research, however the number of free invitations is limited based on the size of the credit union. For specific figures, contact your Partner Success Manager.

# 02. How do we get started?

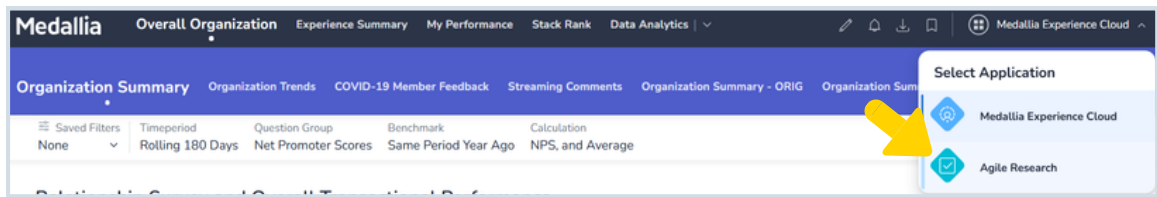
## Medallia Documentation

Agile Research is owned by Medallia. Your team has access to the features of Agile Research through your partnership with Member Loyalty group. Medallia provides an [Agile Research Help Center](#) containing a vast array of guides and resources as you build, send, gather responses, and report results from your survey.

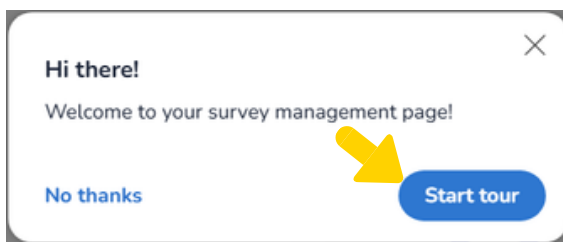
## Agile Research Application

The Agile Research application is accessed through the Medallia platform. Follow the steps below once you've logged into Medallia.

**Click the carat next to Medallia Experience Cloud in the top right corner and select "Agile Research."**



**When you log in for the first time a pop-up will appear. Click "Start Tour" to be introduced to the application.**



## Getting Started Checklist

Agile Research is available to your credit union now. Simply [contact MLG's Support Team](#), or your Partner Success Manager. Once your team has access, review Medallia's [Getting Started Checklist](#) to walk you through the creation and deployment of your first survey.

## Branding: Survey & Invitation

Agile Research allows the team to customize both the survey and the invitation prior to sending by selecting the colors, fonts, and images used. Many customization options exist for surveys. To learn what can be leveraged, check out the [Survey Appearance](#) article in the Medallia Agile Research documentation. It's possible to [create a theme](#), or a saved set of appearance selections, to apply to surveys for ease of use. Invitations can be [sent directly from the Agile Research email system](#). When creating the invitation, options exist to add branding and customizations. Your team may choose to [embed the first question](#) into the email and [add logos or images](#) to the email invitation. Consider personalizing the experience by [adding a variable banner](#) to the invitation or survey.

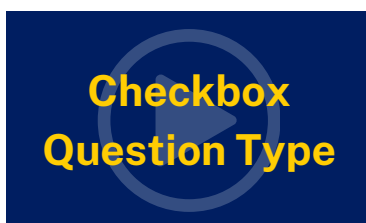
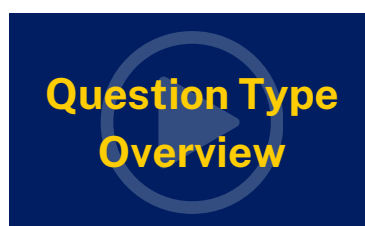
## Step-by-Step Videos

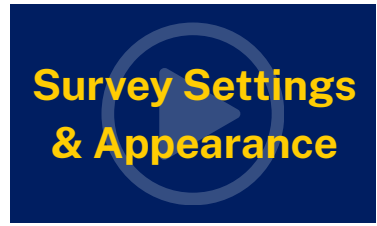
The links below provide step-by-step instruction to get started with Agile Research.

### 1. Navigation

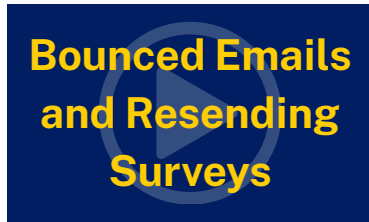


### 2. Building a Survey





### 3. Distribute Survey



# 03. What are some best practices?

## Appropriate Question Types

Agile Research offers the ability to create questions using over twenty various question types. Determining the appropriate type of question to use is highly dependent on the information your team is hoping to gather. In the Help Center, Medallia provides a [list of question types](#). There are subsections that further describe the use for each. These are accessible on the left of the screen.

## Survey Best Practices

### Use MLG's standard subject line when requesting feedback.

The subject line “[Credit Union Name] Requests Your Feedback” consistently outperforms any custom subject line used by our credit union partners when it comes to open, click, and response rates.

### Consider both web and mobile browsers when designing the invitation and survey.

Data over time shows that the vast majority of members complete the survey from a mobile device. It's imperative to test the compatibility in both a mobile and web browser prior to launching a survey.

### Embed the first question in the body of the survey invitation email.

When a member receives an invitation to provide feedback, the best results are obtained when they are prompted to start the survey right from the email. By [embedding the first question](#) in the body of the email, rather than requiring the member to click a link or button to begin the survey, the member becomes more engaged and is more likely to respond.

### Keep the survey short.

Avoid questions that are not specifically related to the survey being sent. If the questions posed are too complex or irrelevant to the experience, the member may decide not to complete the survey. When a member is able to respond quickly, they are less likely to abandon the survey. Attempt to keep survey response times under two minutes.

# Invitation Files and Reporting

## Consider desired reporting data when creating invitation files.

Agile Research reporting options are robust and customizable, however reporting is limited to the data included in the invitation file. Once an invitation file is uploaded and surveys are sent, additional data fields cannot be added. While developing the invitation files, consider asking your team *“What are we hoping to discover? What information would we like available for reporting?”* Here are some examples.

**Age Bands:** Many credit unions seek to understand how consumer preferences vary across age groups. Including age bands will allow response reporting categorized into different age groups. Avoid including the date of birth, as this limits reporting to that specific date.

**Tenure:** Consider including the length of time membership has been established to compare the responses of members across various tenures.

**Product Usage:** Examine how the member’s engagement with the credit union - such as the array of products used or count of products used - impacts sentiment reporting.

**Frequency or Primary Methods of Interaction:** Compare results from members who interact with the credit union at various frequencies or platforms, such as web, mobile, or branch.

These optional data fields included in the invitation files are determined by the credit union team and based on the desired reporting capabilities.

## Utilize the Medallia Reporting Guide.

Medallia provides a [Reporting Guide](#) in their Help Center that gives step-by-step instructions on the various options for results reporting. Here you can find how to build dashboards, create shareable reports, and leverage tools in the Agile Research platform to display results for analysis.

## Branding Reports

Within Medallia’s ReportBuilder, credit unions have the option to personalize the look-and-feel of the reports generated. Adding the company’s logo, selecting the font, and changing the colors are all options. Consider creating a “Theme” that can be saved and applied to future all reports. To learn more, check out the [Report Style and Themes](#) section of the Reporting Guide.

## Step-by-Step Reporting Videos

Respondents  
Overview

Download  
Results

Report  
Appearance and  
Styling

Filtering

Add Multiple  
Questions to One  
Chart

Creating  
Breakouts for an  
Element

Share the Results

## Avoid Invite Throttling

### What is Invite Throttling?

At times, Medallia will slow the delivery of survey invitations. This occurs when the bounce or complaint rates surpass certain thresholds. The purpose of throttling is to allow time to correct issues with invitation email addresses, if necessary, and to protect the [Sender Reputation Score](#). Throttling is limited per survey and lasts 24 hours.

### How do we avoid having invitations slowed?

**Verify contact information frequently.** Higher bounce rates will trigger invitation throttling, or a slowing of invitations for a set period of time. Verify all email addresses contained within the invite files have not previously bounced. Bounced email addresses will automatically be registered by Medallia in your contacts. If an email bounces due to misspelling, you may edit and resend the invitation. Learn more by reading [Correcting Bounced Contacts and Resending Email Invitations](#).

**Consider using a secure third party email verification tool.** These can help teams by quickly confirming the validity of email addresses. This helps ensure the email addresses listed in invitation files are accurate.

## Will our team receive a notification?

Yes, the user in Medallia with the Agile Research role will receive an email notification alerting them that invitation speed has been slowed. The notification will contain either a [High Bounce Rate Warning](#) or a [High Complaint Rate Warning](#).