

YOUR GUIDE TO:

AUTOMATING YOUR TRACKER

Your resource for transitioning an existing tracking project from one vendor to another, including moving from a traditional agency to an automated platform.



WHY AUTOMATE YOUR TRACKER?

Transitioning to an automated platform allows you to modernize and future-proof your tracking study while reducing manual effort and time:



FLEXIBLE AND HANDS-ON
END-TO-END
MANAGEMENT



REAL-TIME DATA
ANALYTICS WITH
AUTOMATED
SIG. TESTING



ADVANCED
METHODS FOR
ACTIONABLE
INSIGHTS



INTERACTIVE
DASHBOARDS
THAT UPDATE
AUTOMATICALLY



AI FEATURES TO
INSTANTLY
GENERATE KEY
INSIGHTS



HOW TO AUTOMATE YOUR TRACKER

Consistency is key when creating your automated tracker to maintain the integrity of your existing insights. Below are 3 key areas to focus on:

CONTENT

To preserve trends from your existing tracker keep questions, phrasing, formats, and routing logic consistent in your new, automated questionnaire. Even small tweaks to language and design can impact your results and KPIs.

For example: A 'single-select matrix' question will lead to different levels of brand awareness than a 'multi select' question.

SAMPLE

Your study's target group is one of the most important factors to keep consistent in your new tracker. Maintain any quotas you've used in your past tracker and ask your panel provider for specific sampling details to mirror.

For example: If your tracker targeted 'chocolate buyers in the past 3 months', your new one should too.

ANALYSIS

Consistency is just as important for analysis as it is for content and sample. When analyzing questions, defining groups for data cuts, applying weighting schemes, and implementing data cleaning rules, use all the same approaches.

For example: Don't switch out a mean value chart for a top-2-box percentage chart and try to apply past trends/headlines.

RUN OLD AND NEW STUDIES IN PARALLEL

quantilope recommends running 1 to 2 waves of your new automated tracker in parallel with your current, non-automated tracker. This allows you to compare the data and ensure that any shifts are reflective of the market/consumer behaviors, rather than the methodological approach.



CONFIDENTLY INTERPRET YOUR AUTOMATED TRACKING DATA WITH QUANTILOPE

Even when replicating your existing tracker **as closely as possible** you might encounter some differences. Below are some tips on how to instill stakeholder confidence with new results:

USE COMPETITIVE DATA

quantilope offers real-time data visualization for all survey questions to determine if a shift in KPI is true for all brands (methodological), or just one (behavioral).

USE HISTORIC DATA

quantilope allows you to import historic tracking data into its platform for instant wave-over-wave comparisons between old and new tracking systems.

USE PARALLEL DATA

quantilope's research consultants are experts in automating trackers and will help you run parallel waves or calibrate data if necessary.