

# A buyer's guide to market research software



# An introduction to this buyer's guide to market research software

If you're reading this publication, you've made a conscious decision to reassess certain technological aspects of your market research operations. And while the technology environment has changed significantly in recent years, forming a new paradigm in which we're working, the fundamentals of market research remain. It's our role as market researchers to help stakeholders gain a better understanding of society, the market, and consumers, in such a way that brings about a positive change to the rest of our organization.

Rather than being all doom and gloom about the state of our industry and what will happen if we don't adopt new technology, we prefer a more upbeat approach to these new (and existing) tools at our disposal, one where you can see that leveraging these innovations is more attainable than you first thought.

If you put aside the hype from various tech companies and commentators, one of the biggest challenges organizations face is not so much innovation but rather the abundance of choice. It feels like there are as many ways to solve a problem as there are technology solutions that claim to be the next best thing.

At Infotools, we understand how overwhelming this can feel and we're on a mission to help make sure that it's not. With so many software options in the market and so many claims being made, we've put this guide together knowing that while the stakes are high—financially, operationally, and strategically—the rewards of making the right investment are even higher.

Your team needs tools that not only streamline your operations but also boost productivity, reduce costs, and give you the agility to adapt in an unpredictable market. The right software should also make it easier to communicate insights across large, complex, and global organizations.

This updated guide is here to help you make those crucial decisions—whether you're on the hunt for a new data visualization platform or are looking to optimize your data processing workflows.

For over 35 years, Infotools has been at the forefront of creating and applying cutting-edge software for market research, partnering with leading global brands and research agencies. We've learned a lot about what works—and what doesn't—so that you can make smarter choices when it's time to upgrade your technology.



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CHAPTER 1

# Assessing innovation:

Do you even  
need to change?

# Assessing innovation: Do you even need to change?

The question everyone should ask themselves when considering a new tool or software platform is very rarely asked - what would happen if we didn't change? In today's day and age where storms in teacups quickly pass us by, doing nothing can sometimes be the best course of action.

It can be difficult to know what is a fad, what is hype and what actually deserves extra attention. Arguably, there are those who did nothing when generative AI first splashed onto the scene, and they're not necessarily worse off today. It's yet to be seen if that will still ring true in the future, as there are now plenty of examples of organizations who have benefited from the usage of Gen AI. Finding that balance is essential.

Change should be seen as a scale since there is no determined amount required in order to achieve progress. From a processes perspective, it may be that a small piece of software is implemented to streamline a particular task. An example at the other end of the scale is a full-blown Generative AI implementation that can do every single thing a market researcher can do.

It's very rare that big changes within an organization occur overnight and, if they do, the success rates of implementing such changes are infinitesimal. The best way to achieve larger change is breaking down the program of work into a manageable journey, where you embark on a series of sequential micro 'projects'. Even when change begins at a slower pace, after a while you'll look back and be surprised at how far you've already traveled. And at that point you'll likely agree there will be no turning back.

So the answer is yes. You do need to change and adapt and grow. But how much and how quickly is up to you.



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CHAPTER 2

# The evolving market research toolkit: Quality, AI and adaptability

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## 1. SPEED TO INSIGHTS SLIPS A SPOT ON THE PODIUM

Speed has always been a critical factor in the trifecta of “faster, better, cheaper” - a mantra the industry has been chanting for years. And yes, the drive for faster, even real-time, insights is paramount in today’s environment. But speed has slipped from first-place on the podium: according to a recent [GRIT report by Greenbook](#), quality (“better”) has edged into the lead.

“Compared to the last GRIT benchmark in 2022, buyers are taking more steps to address sample quality and availability, especially building their own sample or panels, investing in fraud detection processes and services, and automating quality assessment.” This is a clear indicator of the increased focus on quality (finally) - something many vocal industry leaders have been calling for for years. As Lenny Murphy, the man behind the GRIT report, said on our podcast: “Cheaper, faster, better always... But what GRIT tells us is that it is better, cheaper, faster. That is the ranking order—quality comes first.”

Speed, while crucial, has somewhat stabilized in its importance, with many companies already able to meet baseline expectations for quick insights. Now, the focus has shifted more toward quality, something we write about at length in our Space to Think paper, “[Elevating market research data quality into the limelight.](#)”

## 2. AI AT THE FOREFRONT: CUSTOMIZATION AND EFFICIENCY

Generative AI has turned the entire business world upside down, and the insights industry is no exception. Smart software helps us to streamline and automate tasks that were previously manual and time-consuming. From automatically generating questionnaires to summarizing large volumes of qualitative data, AI is improving workflows, freeing up researchers to focus on higher-value tasks. As [Chris Robson from Human8](#) mentioned on our podcast, generative AI is a huge time saver, well beyond its more widespread use in chat functions. “Something that would have taken us hours of pouring over data in the past, we can now do in minutes.”

However, it is its ability to free up researchers for “human centered” work that is AI’s true boon. As [Victoria Sakal of Wonder](#) said on our podcast, “AI is great for this whole smattering of things, but only gets weaker and weaker as you move towards the strategic ... it can help people get back to the strategic, forward-looking actual impact-driving work.” We wrote about this balance between human and AI more in our Space to Think paper, [The State of AI in Market Research](#).

This sentiment was also backed up in one of our more recent podcast episodes featuring [Vivienne Ming](#).

Vivienne advocated that AI should make your job harder, not easier. If it’s making your job easier, then you’re not using it in a way that helps you deliver outputs that are net positive to humanity. Rather, we should be looking to use AI to push every aspect of our job, being held accountable to deliver work that AI would never be able to produce itself.

For this reason alone, AI is also something we can’t afford to ignore. According to a [new paper](#) (Alexander Bick, Adam Blandin, and David J. Deming) that presents results from the first nationally representative U.S. survey of generative AI adoption at work and at home - adoption of AI is faster than any technology before it.

“Thirty-nine percent of the U.S. population aged 18-64 use generative AI. More than 24 percent of workers used it at least once in the week prior to being surveyed, and nearly one in nine used it every workday. Historical data on usage and mass-market product launches suggest that U.S. adoption of generative AI has been faster than adoption of the personal computer and the internet.” It’s a matter of adoption, and moving forward.



### 3. ADAPTABILITY IS THE KEY TO STAYING AHEAD

The market research landscape is in flux, fueled by fast-evolving technology. To stay ahead, it's crucial to select platforms that are not only scalable but adaptable to new data sources and technologies. The right platform should offer flexibility, enabling teams to work collaboratively or independently, and cater to a broad spectrum of research needs. And that's just the tip of the iceberg.

Finding the right mix of tools is essential. Whether it's data visualization or automated reporting, prioritize technologies that streamline processes while enhancing the quality of insights. Above all, opt for solutions that can grow and adapt with your team—ready for whatever the future holds—while holding true the fundamentals of our industry.

### 4. BE CLEAR ON THE FUNDAMENTALS

The fundamentals are something we bang on about a lot at Infotools, and for good reason. It's easy to get swept away by public opinion, trends, and hype, without giving any thought as to whether they're actually what's best for the organization. For market researchers, it boils down to helping colleagues to better understand consumers so the organization can make better decisions, manufacture better products, and provide better services.

- Grounded in statistics - make sure your findings measure up to industry standards.
- Confidence in findings - beware how tech 'shortcuts' can impact the quality of insights.
- Think commercially - market research needs to positively impact the business.
- Be open - measure new tools and processes against your existing ways of working.
- Challenge status quo - the old ways of working may not be fit for purpose now.
- Question new - just because everyone's talking about it doesn't make it accurate.
- Maintain integrity - keep your data clean and raw so it maintains its value.



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CHAPTER 3

# Business intelligence tools can fall short with market research data

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This is a topic that's important to address right up front when we're talking about software choices. Often internal departments champion the use of business intelligence (BI) tools (think Tableau and PowerBI), because they are already in place to crunch various forms of business data. However, they may not always be well-suited for the complexities of market research data. As our SVP John Bird wrote for [Research World](#), "People assume that they can handle pretty much any type of data, insisting on using the BI platform in situations where they aren't a natural choice...So, why do we continue to attempt to fit a square peg in a round hole when it comes to analyzing market research data?"

Market research requires precision in handling respondent-level data, weighted variables, significance testing, and multi-response questions—tasks where generic BI platforms struggle. Using tools purpose-built for market research ensures insights teams can deliver faster, more accurate answers and establish their authority with internal stakeholders. Here's how BI tools can fall short:

## 1. DATA INPUT COMPLEXITY

Market research pulls from diverse sources like surveys, online interactions, in-store shopping behavior, and social media. BI tools, designed for aggregate and relational data, can't always handle the respondent-level granularity that market research demands. They often lose critical domain context, leading to inefficiencies and costly workarounds to maintain data integrity. This issue can be exacerbated if these systems are inputting tables as their data source, as the data files are also aggregated.

## 2. HANDLING INSIGHT-SPECIFIC TASKS

BI platforms can struggle with essential market research tasks like weighted data analysis, significance testing, and handling multi-response questions. Without these capabilities, teams are forced into manual processes or inefficient workarounds, which slows decision-making and reduces the value of their insights. As [Mike Stevens of Insight Platforms](#) said "normally the people who say go for the generic are the people who don't actually do the work" and those types of platforms "fundamentally cannot cope with all of the disparate types of analytics."

### 3. LIMITED DATA ACCESSIBILITY

Collaboration is essential in market research, but BI tools often require technical expertise for querying and data manipulation, locking out non-technical team members. Specialized market research platforms allow for broader, self-service access, ensuring everyone involved can explore and use insights to drive decisions.

### 4. LACK OF AUTOMATION

Market research requires speed and accuracy, yet BI tools often fall short by requiring manual setup of crosstabs and queries. Market research platforms, on the other hand, automate these processes, saving valuable time and allowing researchers to focus on interpreting results. BI tools also fail to provide automated insights, like identifying significant differences between audience segments, which are vital for strategic decisions.

### 5. COMPLEX USER EXPERIENCE

BI tools are often designed for data experts, making them difficult for non-specialists to navigate. This creates silos within the organization, where only a few can access or analyze data. Instead, choose a market research platform that prioritizes user-friendly workflows, allowing anyone on the team to generate and explore insights with ease. Stevens says, "There's a whole load of niche audiences, for whom research is not their day to day, who need to run analytics and access data through these platforms, in new and creative ways."

If you're a market researcher considering software implementation to meet your unique challenges, BI tools are likely not the best fit. A market research platform designed for the job not only streamlines data handling and analysis but also fosters collaboration and speeds up the delivery of actionable insights, driving better results and maximizing ROI.



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CHAPTER 4

# Calculating the risk-benefit ratio of new market research tools

# Calculating the risk-benefit ratio of new market research tools

How many times in your life have you created a “pros and cons” list? It’s an easy way to help guide decisions, including market research software implementation and adoption. While the right solutions have the potential to speed up your processes and make you more efficient (pro), many are hesitant because of potential difficult learning curves and interrupted workflows (cons). Ask yourself these questions to help make your decision smoother.

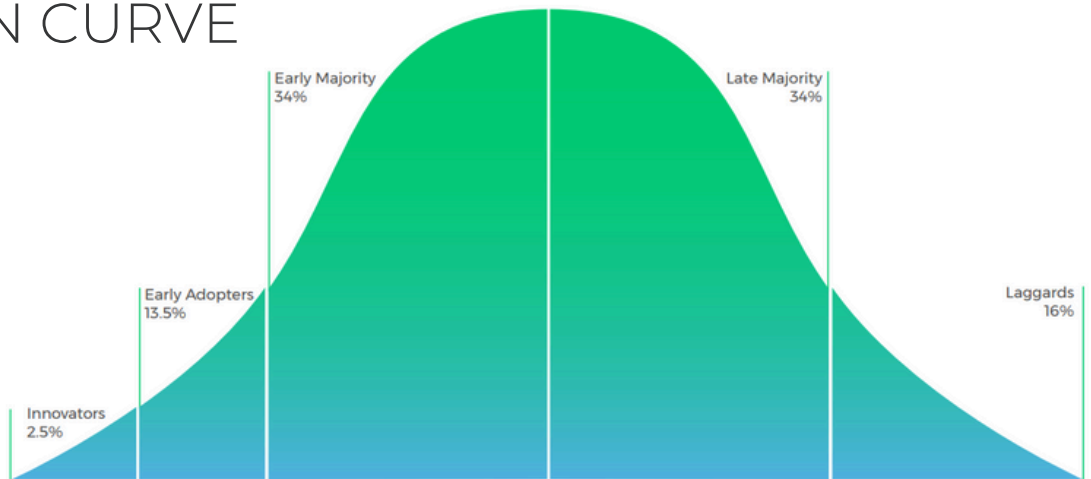
## 1. WHAT ARE THE BENEFITS FOR MY TEAM?

Market research pulls from diverse sources like surveys, online interactions, in-store shopping behavior, and social media. BI tools, designed for aggregate and relational data, can’t always handle the respondent-level granularity that market research demands. They often lose critical domain context, leading to inefficiencies and costly workarounds to maintain data integrity. This issue can be exacerbated if these systems are inputting tables as their data source, as the data files are also aggregated.

## 2. HOW EASILY CAN WE OVERCOME RESISTANCE TO CHANGE?

Resistance to change is natural. People tend to stick with familiar tools and processes even when better solutions are available. You need to assess where your team is on the technology adoption lifecycle. Are they early adopters ready for the latest tools, or more conservative, needing a proven solution? Your organization's risk appetite and the demands of internal stakeholders will heavily influence the timing of your decision. Smith advises starting small to ease the transition: “You have to really think about small little pieces of change that you can implement...focusing on small change helps you see more tangible results.” By rolling out new technology in manageable phases, you minimize risk, gain early wins, and build momentum for larger organizational shifts.

# THE TECHNOLOGY ADOPTION CURVE



The technology adoption lifecycle model divides buyers of technology into these categories:

- **Innovators:** typically highly informed about technology and willing to take risks and invest in new products.
- **Early adopters:** also have high risk threshold but less willing to invest.
- **Early majority:** more conservative but open to new ideas and often leaders in their respective sectors.
- **Late majority:** quite conservative and prefer following mainstream trends.
- **Laggards:** prefer paper.

## 3. WILL THIS NEW SOLUTION BE “INVISIBLE”?

While the risks of new software are real, the potential rewards can be game-changing. New platforms bring faster, more accurate analysis and dynamic reporting, especially if they work invisibly in the background. Our marketing lead [Michael Howard wrote for Greenbook](#), “What we really want is technology that renders previously lengthy tasks invisible, so we can get on with our jobs.”

For market research teams, that means automating tasks like data cleaning and report generation, freeing up time for deeper analysis and insight-sharing. The best platforms integrate seamlessly into workflows, allowing your team to focus on delivering strategic insights rather than wrestling with complicated interfaces. This definitely provides a lean toward the “pros” of the overall decision.

## 4. HOW DO WE MANAGE THE RISKS OF INTEGRATING MULTIPLE TOOLS?

As market research becomes more complex, teams are increasingly relying on multiple tools to cover various stages of the research process. However, moving data between platforms—especially manually—raises the risk of data loss, duplication, or errors. Do we have robust processes, such as APIs or automated data pipelines, to ensure that data transfers between platforms are seamless and accurate?

Stevens says that as the market research and data environment matures, we will see more integrations where “data can flow between specialized solutions...heading into a more connected ecosystem.” Ensure these connections are in place, tried and true, to help reduce any need for manual intervention and minimize the risks of human error.

## 5. SHOULD WE BUY OR BUILD A SOLUTION?

Custom-built platforms offer the advantage of being tailored specifically to your company’s needs, but they often come with long development timelines and higher maintenance costs. On the other hand, vendor-supported, pre-built solutions bring years of industry expertise and quicker implementation.

Do we have unique needs that justify the investment in building a solution from scratch, or would an out-of-the-box option that’s continuously updated by the vendor better serve our long-term goals? Additionally, how will in-house development impact IT resource allocation and future support?

## 6. CAN THIS PLATFORM INTEGRATE MULTIPLE DATA SOURCES SEAMLESSLY?

Consider the data sources in your business. They can consist of many different touchpoints and parts of the business: manufacturing, sales, media, social media, market research, customer feedback, transaction data and more. You must bring all these together to provide the level of understanding needed for connecting with your customer in a personal, relevant way - whether it is through your communications, product development, marketing or other interaction.

With more data streams available than ever (and they are still growing) it’s critical to have a platform that can effectively combine them without needing error-prone manual intervention. It is also important that it can process increasing volumes of data quickly while maintaining precision.



You need a holistic view of your insights via a solution that can consolidate data sources, without needing workarounds or additional tools to bridge the gap.

## 7. HOW WILL WE MEET INTERNAL DEMANDS?

The competition for delivering insights is fierce, with external providers and internal teams (e.g., marketing, IT, business intelligence) all vying for influence. Primary research is now just one of many information sources. Does this new technology allow us to differentiate by combining data sources, speeding up processing, and presenting insights in a more compelling, innovative way?

Our Group Services Director, [Horst Feldhaeuser](#), said that “having better design service, reducing time of service, getting better data quality...ultimately allows us to make better business decisions.” The right platform should enable a team to focus less on technical complexities and more on delivering impactful insights, exceeding expectations and driving stronger engagement with key decision-makers.

These questions should get you started on your pros and cons list. Chances are it looks something like this:

### Pros (the benefits)

- **Stand out with compelling insights** – Good reporting software transforms data into impactful, decision-driving narratives.
- **Boost productivity** – Automate data processing, freeing up your team to focus on high-value tasks and insights.
- **Reduce costs long-term** – Increased productivity from automation can lower operational costs over time.
- **Enhance data quality** – Direct connections to data sources minimize human error and ensure more accurate insights.
- **Focus on strategic insights** – Spend more time uncovering actionable insights that lead to business-changing decisions.
- **Keep stakeholders informed** – Leverage mobile alerts and real-time updates to ensure decision-makers stay in the loop.
- **Foster cross-department collaboration** – Allow colleagues to explore data and insights independently, enhancing transparency and trust.

### Cons (the risks)

- **Initial investment** – New software comes with upfront costs that may strain your budget, especially if ROI takes time to materialize.
- **Training time** – Implementing new tools requires time for staff to upskill, which could temporarily affect productivity.
- **Organizational disruption** – Shifting to new software may lead to changes in team structure or necessitate role eliminations.
- **Unmet expectations** – There’s always a risk that the chosen software or vendor won’t fully deliver on their promises.
- **Risk appetite** – If your team or organization is hesitant to embrace new technologies, the shift may face internal resistance.



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CHAPTER 5

# Five ways that tech elevates the insights function across your organization

# Five ways that tech elevates the insights function across your organization

Here's one more question you can ask yourself when selecting new market research software: Will this solution help differentiate our insights team and get us that "seat at the table" we all desire?

If you want to get noticed by stakeholders across your organization, you must go beyond traditional, static reports and make sure data leads to real business impact. To earn a seat at the executive table, researchers need to show clear ROI by integrating their insights into the strategic process and demonstrating how they contribute to business growth. [Emily Paladino of Country Road Group](#) emphasizes the importance of "developing those relationships, building the profile of the team, and pushing yourself to be involved in the decision-making and conversations that are taking place across the businesses."

This is where technology can be a game-changer. Tools like AI-driven analytics, automated dashboards, and real-time data visualization help researchers quickly turn complex findings into actionable insights. These technologies also allow decision-makers to explore data more easily, cutting down on inefficiencies and making insights more accessible. By using tech to deliver fast, relevant insights that tie directly to business goals, researchers can highlight their value and become key players in C-suite conversations.

## 1. ENRICH THE CONSUMER RESEARCH PICTURE BY COMBINING MULTIPLE DATA SOURCES

To influence the C-suite, you must provide a more comprehensive view of the consumer. [Aparnaa Rajasekaran of Georgia Pacific](#) describes it as moving beyond just data: "These insights can come from many places...but the insight becomes influential when you are, as an insights professional, able to crystallize these into something more meaningful and actionable so the leadership team can act on it." Combining all your data sources offers richer context and more persuasive insights.

## 2. DELIVER RESULTS IN WAYS THAT ARE EASILY DIGESTIBLE AND DEVICE-AGNOSTIC

The C-suite typically doesn't have time to dig into granular data, so presenting insights in a format that's easy to consume, with the option to drill down when needed, is crucial. The data should be visually engaging and accessible across platforms, allowing leaders to quickly understand the key takeaways.

[Bryan Smith of Ipsos](#) said, "If you're using market research technology to implement the way of delivering results, that can be a lot easier than getting PowerPoint. Especially if you have a touchpoint like a dashboard, where an end user can go and query that data and dig in deeper. This can really empower not only my internal colleagues, but also our clients as well."

## 3. MAKE THE DATA INTERACTIVE AND EXCITING

Presenting insights in a dynamic way can capture the attention of leadership. [Vera Wang of Warner Bros. Discovery](#) stresses the importance of making research come alive: "Once all this kind of research is done, it's really, really critical for us to take those insights and bring them to life in a persuasive manner." For instance, an interactive dashboard showing brand awareness across regions is more likely to resonate than static charts and graphs.

## 4. BRING ALL DATA INTO ONE PLACE

Consider the data sources in your business. They can consist of many different touchpoints and parts of the business: manufacturing, sales, media, social media, market research, customer feedback, transaction data and more. You must bring all these together to provide the level of understanding needed for connecting with your customer in a personal, relevant way - whether it is through your communications, product development, marketing or other interaction.

With more data streams available than ever (and they are still growing) it's critical to have a platform that can effectively combine them without needing error-prone manual intervention. It is also important that it can process increasing volumes of data quickly while maintaining precision.

## 5. LET THE DATA TELL THE STORY

Rajasekaran talks about how the real power lies in “the ability to drive positive change or influence a strategic organizational decision or action based on deep, meaningful data.” The goal is not just to present facts, but to turn those facts into a narrative that clearly demonstrates what’s at stake and how the insights can lead to better outcomes.

When data is presented in a compelling story format, leadership is more likely to take action. [Brian Robinson](#), former leader of analytics teams at Meta and Yahoo!, emphasizes the importance of storytelling in market research and analytics roles. “The story is the means of passing the power on to other people.”

Internal research teams are under pressure not just to deliver insights, but to stand out from other departments like marketing, IT, and even external agencies. External agencies must distinguish themselves from a crowded marketplace. The right technology can make your insights more compelling and valuable, empowering your team to present data in ways that resonate with the C-suite and other stakeholders.



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CHAPTER 6

# It's time to make a decision mitigate your risk

# It's time to make a decision: Mitigate your risk

## **Product quality: setting a baseline for success**

Before you dive into the flashy features of any software, focus on its basic performance and reliability. You want a solution that can handle your current needs but is scalable for future growth. Consider the learning curve—how easily can your team adopt the tool?

While user-friendly platforms reduce the need for extensive training, more complex software may offer greater power at the expense of ease of use. Make sure there's a balance between functionality and usability. Explore if the vendor offers self-service learning resources, such as online tutorials, which can speed up onboarding without significant disruption to your workflow.

## **Vendor credibility: partnering for the long haul**

The software provider you choose is as important as the technology itself. You need to feel confident that your vendor will be a long-term partner, providing the support you need not only during implementation but throughout your usage of the platform.

Proven experience in the market research industry is crucial here. Look for vendors with a strong track record of supporting similar businesses or agencies. Check for case studies, reviews, and testimonials to get a sense of how well they've helped others succeed. A vendor who understands the nuances of market research data and its collection processes will help you avoid pitfalls and set your team up for success.

## **Data security: protecting your most valuable asset**

Data security should be non-negotiable when selecting a market research tool. Ensure the vendor can provide comprehensive documentation on their hosting environments, encryption standards, and audit protocols.

If your business handles sensitive data, such as consumer personal information or proprietary market insights, you need to guarantee that the software meets compliance standards relevant to your region or industry. The vendor should provide a clear explanation of how they safeguard your data, both in transit and at rest.

[Monica Bush of Tango](#) said on our podcast, that when sharing data with third parties (e.g. vendors), “make sure they have some statements on how they protect the data, and perform due diligence on those vendors. If you're a company that's big, maybe you have I.T. Staff and security staff to help you perform those diligence on those vendors. If not, there are firms you can hire to do it on your behalf.”

### **Handling data complexity: can the platform keep up?**

Market research involves working with complex data from multiple sources—whether that’s survey responses, transactional data, or social media interactions. Your software needs to integrate with various data types seamlessly. It should support all standard formats like SPSS, SQL, Excel, or CSV, and ideally, offer API integration for real-time data sharing across platforms. This is crucial for ensuring your insights are not only timely but also as comprehensive as possible. Be cautious of platforms that can’t handle the scale or complexity of your data needs, as this can severely limit your analysis and reporting capabilities. Mike Stevens says that when you get to survey data in particular, “you have some real nuances to the way we need to manage and report on the data...to really make it sit down and behave...you can’t do that with blunt force tools.”

### **Deployment flexibility: SaaS vs. On-Premise**

In today’s cloud-first world, most software is offered as a service (SaaS), but there may be cases where on-premise hosting is preferable, depending on your company’s IT policies. Make sure the vendor offers flexibility in deployment options and can work with your IT team to meet your specific business needs. A good vendor will provide detailed information on how the system is managed and hosted, giving your technical teams confidence in the security and performance of the solution.

### **Transparent pricing and licensing**

It’s crucial to fully understand the pricing structure of the software to avoid hidden costs later. While the most common model is per-user-per-month, you should ask about any additional costs related to data storage, integrations, or support services. Volume pricing may be available for larger teams, so it’s worth negotiating to get the best deal for your organization. The vendor should provide a clear breakdown of the costs involved, including any potential overage fees. Legal advice is recommended to ensure that the terms of the license meet your needs and expectations.

### **Vendor support and learning resources: making the transition smoother**

Transitioning to new software involves inevitable challenges, but a responsive vendor with robust customer support can ease this process significantly. Ensure that the vendor offers multiple avenues of support—whether that’s through a dedicated account manager, a 24/7 help desk, or comprehensive self-service resources like video tutorials and community forums. Having this kind of support will minimize downtime during onboarding and give your team the confidence to quickly adapt to the new platform.



## Some specific questions you can ask include:

1. What sort of market research industry experience and expertise do you have within your business?
2. How big is the learning curve for your software and how will you help our organization, and my team, make the transition?
3. What support is available from your company, and from the broader community of users?
4. Can you provide assurance about the safety of our data?
5. How do you ensure that your technology is transparent and explainable, with clear auditability in how it reaches its outcomes?
6. How open and flexible is your software in terms of integrations with other market research software, especially data collection tools?

## Industry reputation and word of mouth

Lastly, don't underestimate the value of word-of-mouth recommendations. Attend industry events, network with peers, and explore user reviews on specialized market research platforms or broader software review websites.

Trusted sources like [GreenBook](#) or [Capterra](#) can give you a sense of how well a vendor's solution fits the needs of businesses like yours. [Insight Platforms](#) provides an in-depth directory of software related to the insights sector, and while it doesn't rank solutions, it does provide learning resources and events to explore platforms and tools in more depth.

By evaluating these factors and choosing a platform that meets your team's needs, you reduce the risk of a failed software implementation and set your insights team up for long-term success. With the right technology in place, your team can focus on what matters most—delivering actionable, high-quality insights that drive business decisions.



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CHAPTER 7

# A seamless transition when implementing new software

# A seamless transition when implementing new software

Now that you've evaluated your options, tested platforms, and built your business case, it's time to ensure a smooth implementation. Here are three critical strategies to help your team adapt quickly and successfully:

## 1. PLAN FOR PEOPLE AND PROCESS CHANGES

Any new software will impact how your team works. You must anticipate and manage changes in both people and processes. Ask yourself: Does this software require new skills? Will it alter team dynamics or workflows? How much retraining will be needed? Without careful planning, you risk implementing a tool that creates more problems than it solves. Expect short-term productivity dips as your team gets over the learning curve, but if you've chosen wisely, you'll see long-term gains in efficiency and performance.

## 2. INVEST IN A DEDICATED CHAMPION

Successful software implementation needs a champion—someone internally who is laser-focused on making it work. This isn't a side job; it requires a dedicated person who understands the software, is passionate about the technology, and can rally the team. Don't expect someone to juggle this alongside their usual tasks. An enthusiastic, knowledgeable leader will make all the difference in adoption and success.

## 3. TAKE A PHASED APPROACH

Instead of jumping in headfirst, start small. Use the new software on a specific project to showcase its value, keeping the presentation of results familiar to your team and stakeholders. Gradually introduce more features and projects as people grow comfortable. This step-by-step approach minimizes disruption, allowing you to handle challenges in manageable stages rather than facing a massive overhaul all at once.

As [Pierre Dubosc from Semantiweb](#) said on our podcast, "Some of our most valuable insights and contributions to our clients come when we actually do not take things for granted and keep an open mindset when we're open to change to new possibilities." This sentiment encapsulates the essence of successful market research today. To thrive in an industry driven by rapid change, embracing new software and tools is not just an option—it's a necessity.

By staying curious, open-minded, and willing to experiment with new technologies, market research teams can unlock deeper insights and deliver more impactful outcomes. As you move forward, keep this mindset at the core of your strategy to ensure continued innovation and success.

# Harmoni at work in your world



## Infotools Harmoni enables your team to:

**Increase productivity.** Spend less time processing research data, and more time analyzing it. Our platform uses automation to make your job easier.

**Deliver real value.** It's easy to provide valuable, actionable insights to stakeholders.

**Rely on many levels of support.** From our excellent Customer Services Team to our extensive Knowledge Base, a searchable site full of video tutorials and helpful "How to" tips.

**Process your data.** This is a data agnostic platform that understands market research nuances, supports most file types, and has APIs to Decipher, Voxco and others.

**Report.** Create beautiful charts, reports and dashboards with the click of a button. Highlight significant data points, suppress low sample sizes, and more.

**Meet growing expectations.** Market research budgets are shrinking, but expectations are ramping up. Slice and dice your data on the go, as the questions are being asked.

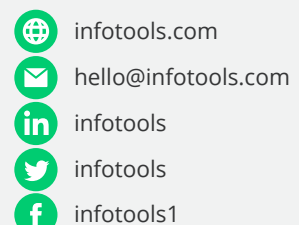
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