

UNDERSTAND APP // LAUNCH PLAYBOOK

In this Launch Playbook, we will provide recommendations to ensure the successful launch of your Understand forum.



BEFORE YOU GET STARTED

We strongly recommend that your team consider these items prior to getting started with the Understand app.

✓ Find a Sponsor

Find a sponsor who wants help researching a given topic.

TIP! This is often a mid-level manager, typically from Marketing, Product, or Services

SITE CONFIGURATION

You have now created your new Understand forum. Here are some areas of your site you may wish to further customize:

REQUIRED

① Set Your Screening Action Items

LOCATION: ADMIN → MANAGE PIPELINE → SCREENING

- Navigate to your 'Screening' step in your pipeline, select the gear menu, and then select 'Configure Single Scale'
- Once there, add your research team members to ensure they receive an action item when new notes get posted.

RECOMMENDED

② Configure Your Site Hero Image

LOCATION: SITE HOME PAGE

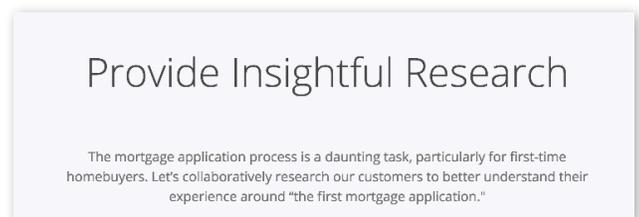
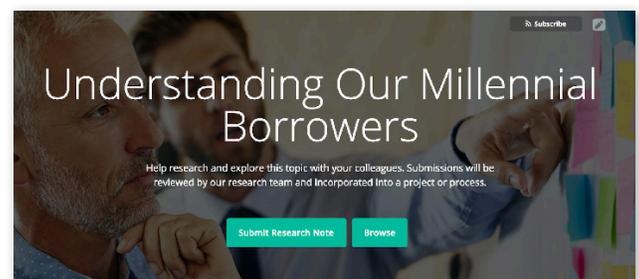
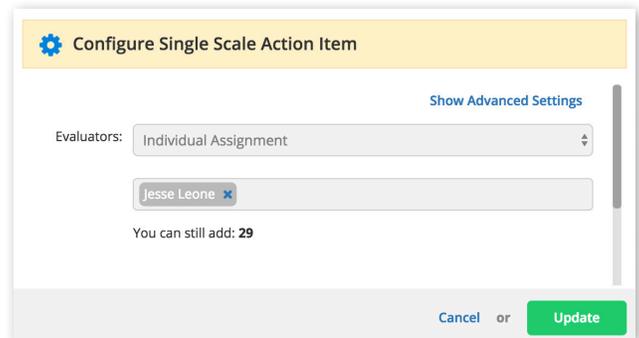
- Many customers like to customize the site hero image.
- Check with your Design/Marketing team for approved images they may have. (Recommended Size: 1280px x 500px). [Here's how.](#)

TIP! This is included in the standard design of the Understand app. If you have an existing design you'd like to use, you may copy it when creating the initiative.

③ Update Your 'Call-to-Action' Section

LOCATION: SITE HOME PAGE

- Detailing the background of your Understand forum will help your submitters get a better picture of what you are looking for..
- Here is a quick run-through on [how to edit widgets.](#)



4 Confirm Site Vanity URL

LOCATION: ADMIN → SETUP → SITE → INFO

- By default, the *Understand app* will provide a default URL for your site, based on your forum name.
- Feel free to update it to something simpler, if you need to share this in other promotional communications.

5 Update Your Submission Form

LOCATION: ADMIN → SETUP → IDEAS → SUBMISSION FORM

- You may want to add some further questions to your submission form, that will help you prioritize or screen research.
- Here's a quick recap on how to update your [submission form](#).

OPTIONAL

6 Add Additional Categories

LOCATION: ADMIN → SETUP → IDEAS → CATEGORIES

- The *Understand app* will default to only four default categories.
- To give your submitters alternate categories, feel free to edit the categories in setup
- Here is how to [update categories](#).

7 Customize Email Alerts to Your Participants

LOCATION: ADMIN → MANAGE PIPELINE → COMMUNICATIONS → EMAILS

- To drive further engagement, you can customize the key email templates that are important to the Understand forum. [Here's how to do so.](#)

TIP! Play with the subject line so it doesn't go straight to the trash folder. Incorporate dynamic fields to personalize these messages

8 Setup a 'Catch All' Email Inbox

LOCATION: ADMIN → SETUP → MAIL TAB

- If you wish to give your submitters an easy way to submit anything "in the moment"— set up an email submission box!
- Here is how to [set up email submission](#) for your forum.

BEST PRACTICES FOR YOUR LAUNCH

Refer to the following best practices to keep your Understand launch on track!

✔ Invite All Relevant Participants

The audience for an Understand forum is critical. Anybody in your company who touches the research subject should be included. This could include any sales, support, consulting, etc. These individuals are on the front lines of the user experience and can share unique perspectives.

✔ Encourage Quantity over Quality

Communicate to your audience that no observation or insight is too small or too big. Remind them to share *anything* they perceive.

✔ Leverage Brightidea Mobile

Any research note can come from anywhere — as should the submissions! Employees should be able to submit whenever, and wherever they are. Here is [more info](#) on setting up Brightidea Mobile.

Learn more about the process of running an Understand forum. Refer to this detailed overview in our Support Portal [here](#).