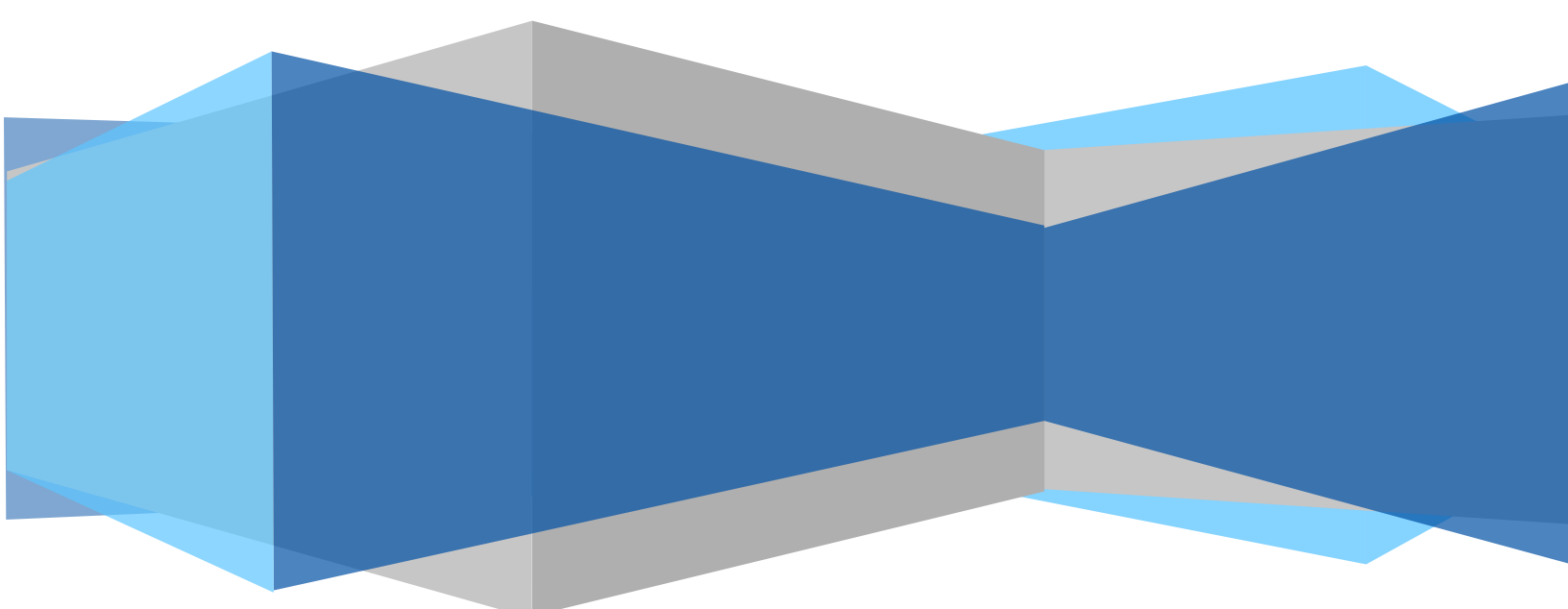




RBC IDEATE User Guide

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Content

- RBC IDEATE User Guide1**
 - Content 2
- Introduction3**
 - Scope and Purpose..... 3
 - Process Overview..... 4
- Signing Up and Logging In5**
 - Requesting Access..... 6
 - Logging In..... 6
- Understanding Your Dashboard.....7**
 - Update Your Password and Help 8
 - Viewing Your Tests..... 9
- Creating a New Test.....11**
 - Configuring Surveys – A 4-Step Process..... 12
 - Step 1: Inputting Test Details..... 12
 - Step 2: Selecting Key Metrics..... 15
 - Step 3: Selecting Your Target Audience 16
 - Step 4: Launch Your Survey..... 18

Introduction

This user guide provides a step-by-step overview on how to setup the IDEATE tool for research, surveys, and measurement. We will look into the tool's dashboard, configuring quick and easy surveys, setting up sampling, and launching IDEATE projects.

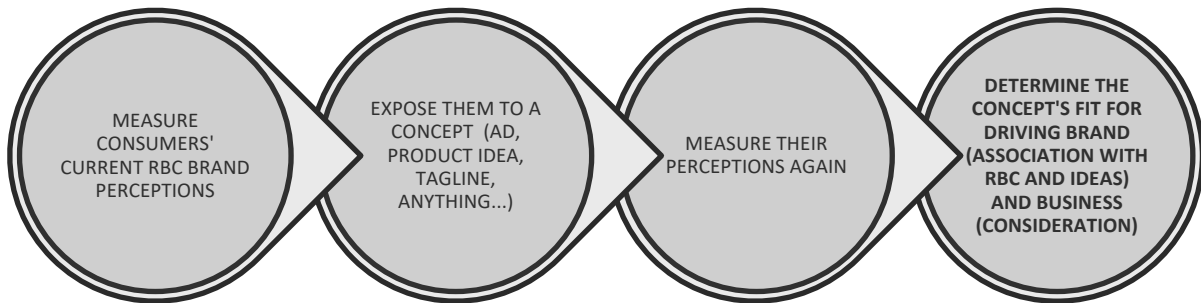
Scope and Purpose

The primary objective of the RBC IDEATE Quick Tool Test is to test RBC-to-consumer creatives to ensure that they:

- Deliver on Idea Bank principles and aligns with RBC's strategic brand and emotional positioning;
- Positively impact Pre-disposition (buying, profits) to RBC; and
- Do not generate any significant negative feedback.

The overarching goal is to ensure that RBC's voice and appearance is consistently and coherently delivering RBC messages.

Process Overview



The IDEATE Quick Tool lets you upload any Video, Image, or Text that you may want to test. The tool also enables you to set up a limited number of custom key metrics. Upon completion of the survey, a report is automatically generated with insights you can confidently act on. Let's look at the process in detail:

1. Signing Up and Logging In
2. Understanding Your Dashboard
3. Configuring Surveys

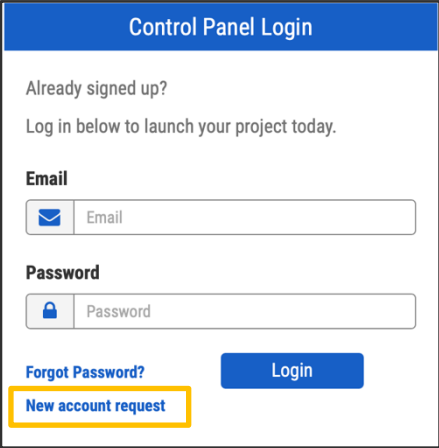
Signing Up and Logging In

In this section we look at how you can request access to the tool and login to it once you have your credentials. To get started visit: <https://rbc.hotspex.com>. You will be directed to a page that looks like this:



Requesting Access

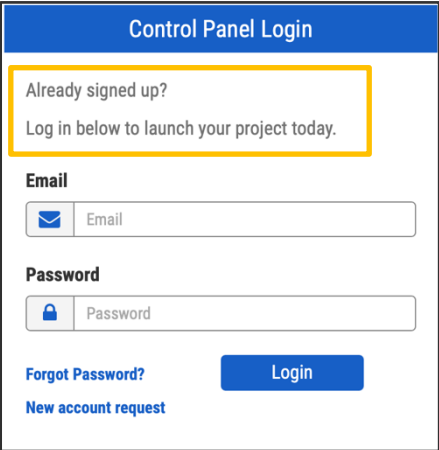
To request a new account request, click on 'New account request.' Hotspex will send you your login credentials within 24 hours of receiving the request. *If you do not receive the email in your Inbox, watch out for it in the Spam folder!*



The screenshot shows the 'Control Panel Login' interface. At the top, it says 'Already signed up?' and 'Log in below to launch your project today.' Below this are two input fields: 'Email' and 'Password'. There are links for 'Forgot Password?' and 'New account request' (highlighted with a yellow box), and a blue 'Login' button.

Logging In

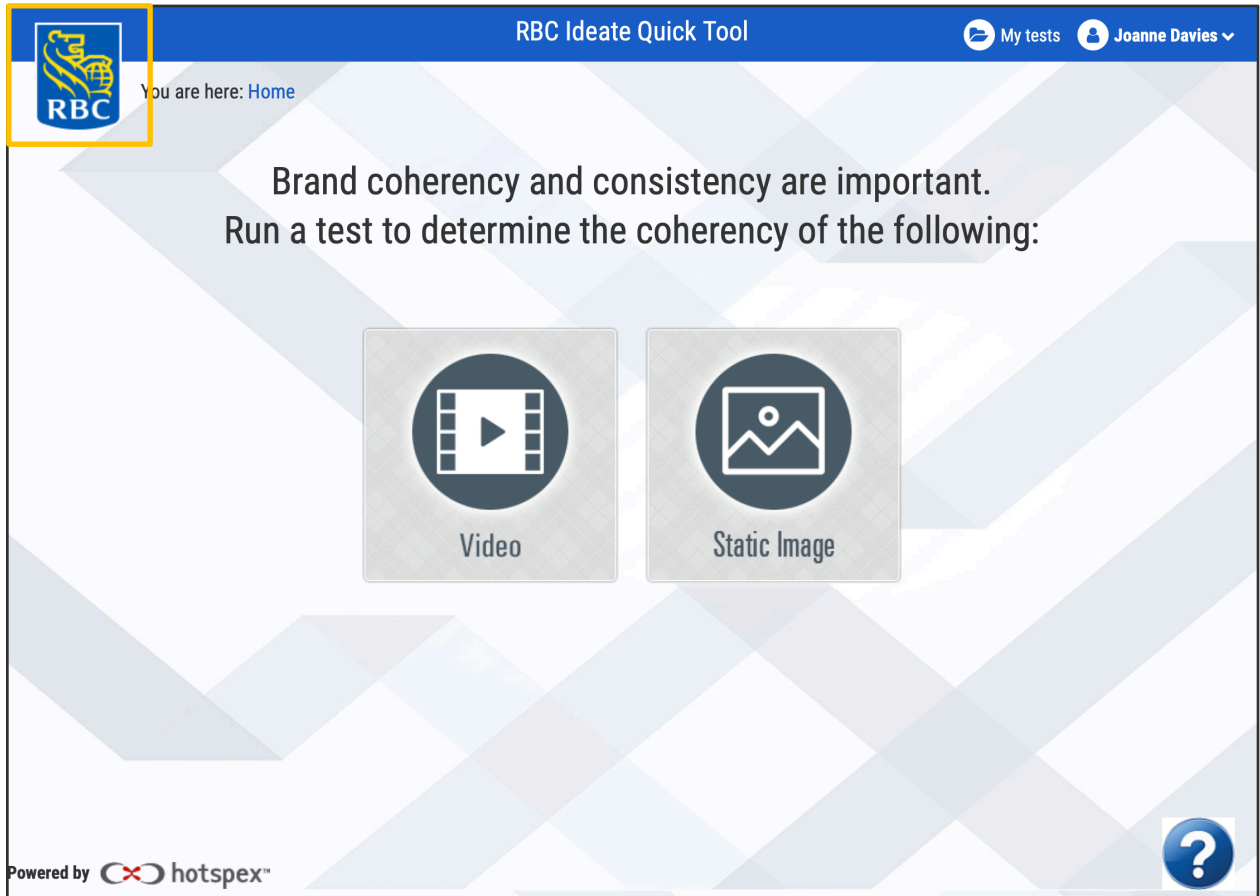
To login to your Dashboard simply visit: <https://rbc.hotspex.com> with your email address and password provided by Hotspex. You can change your password in your dashboard if you wish to.



The screenshot shows the 'Control Panel Login' interface. The text 'Already signed up?' and 'Log in below to launch your project today.' is highlighted with a yellow box. Below this are two input fields: 'Email' and 'Password'. There are links for 'Forgot Password?' and 'New account request', and a blue 'Login' button.

Understanding Your Dashboard

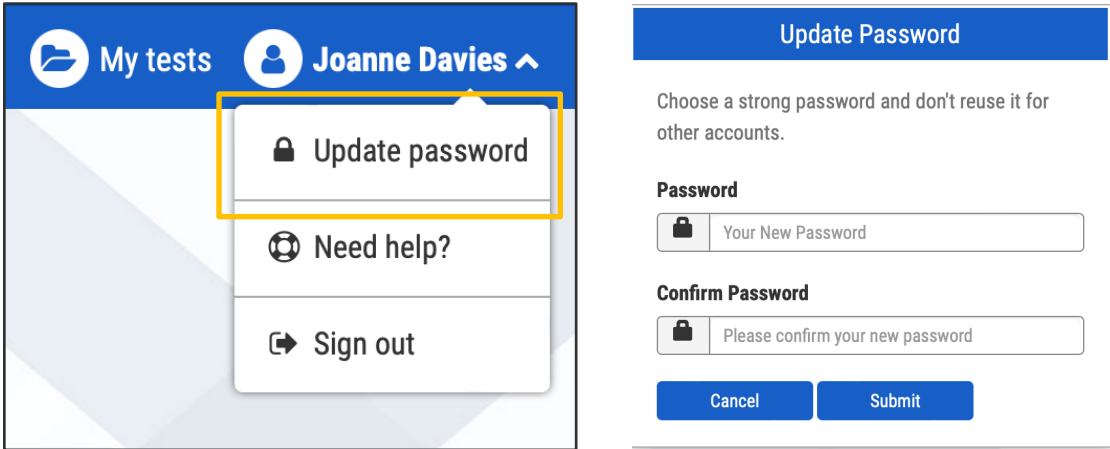
Welcome to Your IDEATE Dashboard! This is where you can update your password, search help, you're your existing tests, and create new tests.



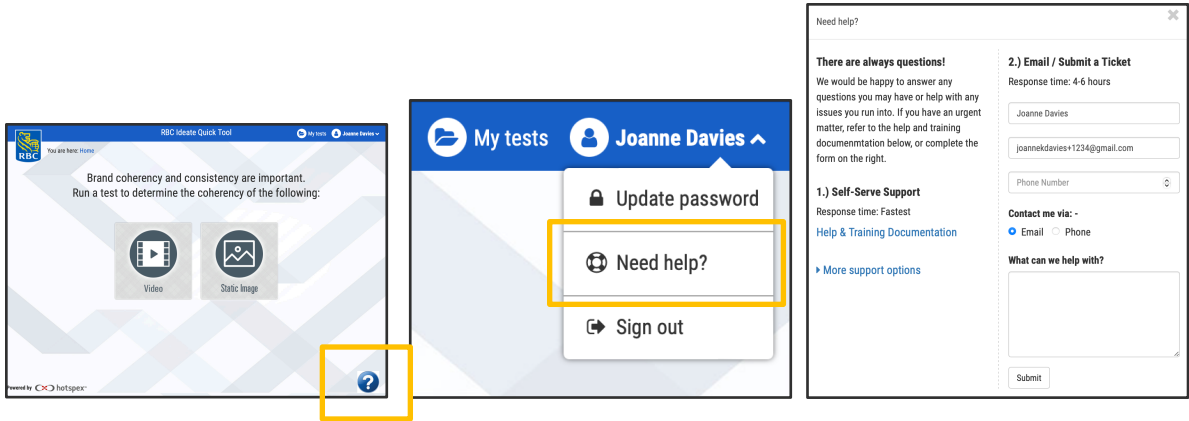
Quick Tip: At Any Point Click on The RBC Logo To Return to Your Dashboard.

Update Your Password and Help

To change your password to a different one, click on your user icon dropdown on the upper right corner of your dashboard. Click on 'Update password' to go to a new page and enter a new one.



For further help and assistance on the tool, you can also click on 'Need help?' to reach out to Hotspex. You will be directed to a new page where you can submit a help ticket and Hotspex will be happy to assist you, or find a link to this documentation.

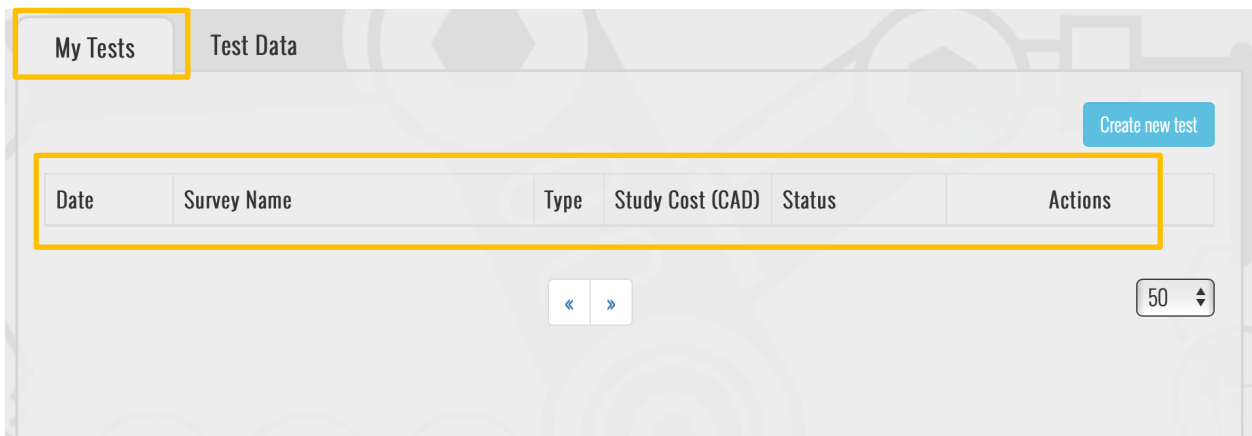


Viewing Your Tests

To view existing tests, click on **'My tests'** on the top right corner of the dashboard, next to your user icon. This will load a new page.



Clicking on the **'My Tests'** tab shows summary details about the tests you have run.



Click on the **Test Data** tab to get detailed overview of all tests in the IDEATE database. This view shows a summary of key metrics that can be sorted by clicking on column headers. You can also filter tests based on sample group and stimuli type.

Date	Test Name	Type	Idea Bank Index	Favourability	Consideration	Recommend	Actions
All	<input type="text"/>						
2/14/2023 12:08:06 PM	Make It Yours - Vancouver	Image	72	23 % / -5pt	26 % / -7pt	22 % / -4pt	
2/14/2023 12:06:23 PM	Make It Yours - Toronto	Image	68	24 % / -2pt	26 % / +3pt	24 % / -7pt	
12/20/2022 8:47:24 AM	RBC_PBA_AirPodsPro_Bowling_30Eng	Video	78	26 % / -4pt	27 % / -4pt	24 % / -4pt	

To download a report, click on the report icon () in the **Actions** column. This will save a copy of the test's report to your computer.

Quick Tip: Click on the column header to sort the reports as you want it!

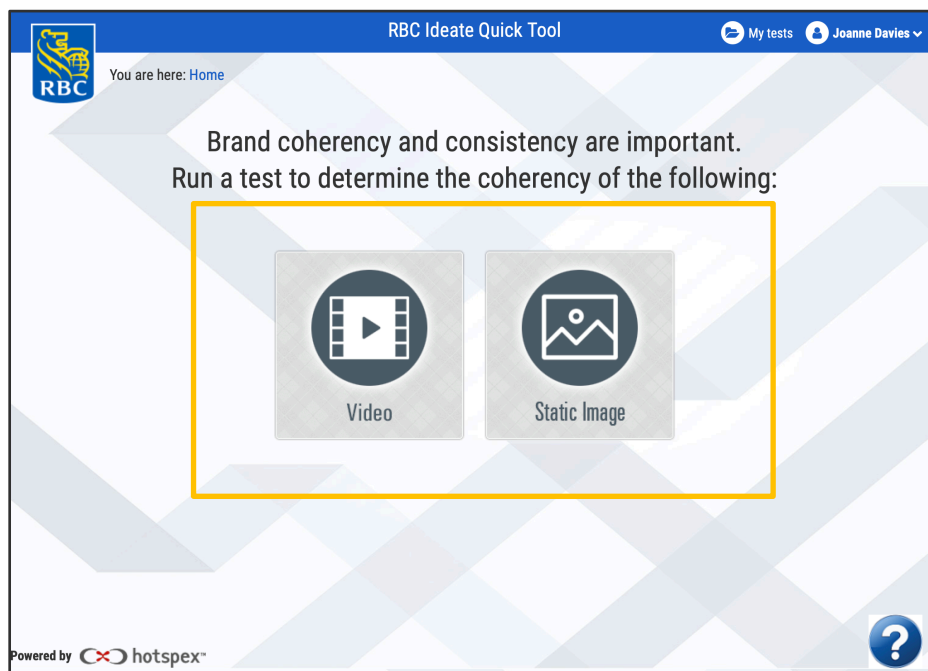


Creating a New Test

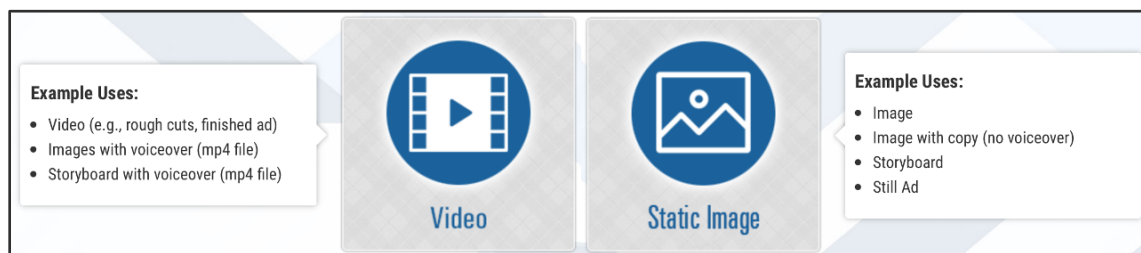
To create a new test, return to your Dashboard and click on the type of stim you want to test.

- Click **Video** if you are testing a Video, Radio Copy with Voiceover, Ad Image with Voiceover
- Click **Static Image** if you are testing an Image, Copy, Storyboard, Still Ad

This will take you to a new page where you can configure your surveys for the stim you selected.



Not sure? Hovering over each icon will bring up a pop-up that lists the types of stim for each type of test.



Configuring Surveys – A 4-Step Process

In this example the user is testing a video ad. This is where you set up and configure new surveys. This section lets you upload the image, define screening criteria, and launch surveys.

Step 1: Inputting Test Details

Provide some details about the creative asset you are testing.

Configure Your Survey - Add Video

To prepare your survey, you will be guided through four simple steps:

CREATIVE UPLOAD KEY METRICS AUDIENCE & COST APPROVAL & LAUNCH

1 — 2 — 3 — 4

Note: Throughout the set-up you will be able to go back to adjust any selections you have made, however settings will not be saved if you close the window.

Please enter some information about the creative asset you are about to test. As the normative database grows, these fields will be used to group similar assets to improve contextual comparisons.

Product / Program / Service

Campaign Name

LOB:

Creative Stage

To upload an **Image**, click on the **'Upload'** button. Make sure your image has a sufficiently high resolution to display on a variety of devices without degraded pixilation. We recommend between 1000px and 2000px in either dimensions, and a maximum size of 500KB. File formats include JPG and PNG. Remember to give your image a name under **'Title'** – **this will be the report name.**

To upload a **Video**, click on the **'Upload'** button. Make sure your video Please upload a video with sufficiently high resolution to display on a variety of devices without degraded pixelation. Warning: Large files take a long time to process and transcode, so try to avoid full HD and files over 1GB. File formats include MP4, Mov and AVI. Remember to give your image a name under **'Title'** – **this will be the report name.**

Video Upload: ?

UPLOAD PLAY

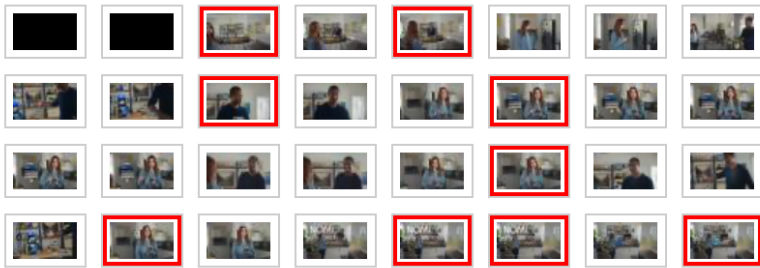
Note: This video is too large for direct streaming and will be transcoded before launch

STORYBOARD / CLICKSPEX: ?

Key frames from the video will be automatically selected to form a storyboard image. Survey respondents will be shown this image and asked to click on areas that they Like and Dislike and leave feedback. Click the Configure button to adjust any frames selected to ensure that your key messages will be included in the storyboard. If your creative asset includes an offer, it is recommended to ensure that this is one of the frames in the storyboard.


Done. Click 'CONFIGURE' to customize storyboard / clickspeX: ?

CONFIGURE PREVIEW



Test Name

VIDEO DURATION (SECONDS):



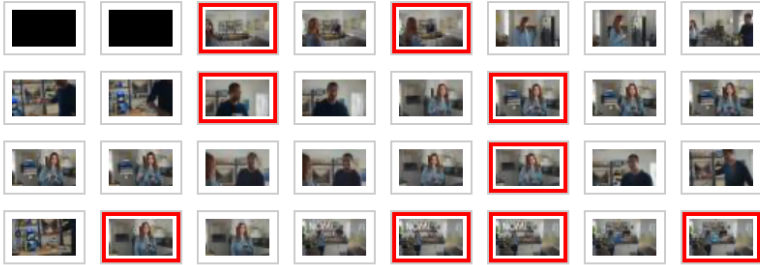
Video Upload:

Note: This video is too large for direct streaming and will be transcoded before launch

STORYBOARD / CLICKSPEX:


Key frames from the video will be automatically selected to form a storyboard image. Survey respondents will be shown this image and asked to click on areas that they Like and Dislike and leave feedback. Click the Configure button to adjust any frames selected to ensure that your key messages will be included in the storyboard. If your creative asset includes an offer, it is recommended to ensure that this is one of the frames in the storyboard.

Done. Click 'CONFIGURE' to customize storyboard / clickspeX:



Test Name

VIDEO DURATION (SECONDS):



For Video tests, a thumbnail library is created including an image for every second of the video, and a storyboard is automatically generated. To change the images that were automatically selected, click 'Configure', which will open a pop-up that allows you to select and un-select images you want included in the storyboard. Click 'Preview' to see your storyboard and 'Save' when you're happy, to save and return to the Setup screen.


To proceed, click 'Continue', and you will be taken to the next section where you can specify some key metrics for the survey. To start over and go back to the Dashboard, click 'Cancel'.

Step 2: Selecting Key Metrics

Five metrics related to Idea Bank are pre-selected for all tests. Consider your objectives for the creative asset being tested, and select three additional metrics that you would like to measure.

Configure Your Survey - Key Metrics

CREATIVE UPLOADKEY METRICSAUDIENCE & COSTAPPROVAL & LAUNCH



Consider the objectives or pillars that the overall campaign, and this creative specifically, is intended to support (i.e. Ease, Real, Conviction, Vision). From the list of 13 statements below select 3 to be used for this test. 5 Idea Bank statements will be automatically included and are checked below.

EASE Pillar ⓘ

- Simplifies my life
- Has well designed products and services
- Is better at offering helpful advice
- Is making banking easier through technology

REAL Pillar ⓘ

- Supports events and causes that are important to me and my community
- Is supporting Canadian youth
- Shows a human side
- Acts in my best interest
- Is a bank I trust

CONVICTION Pillar ⓘ

- Is passionate about helping its customers
- Adapts to the needs of its customers
- Finds creative ideas to help meet customers' needs [always selected]
- Has inspiring ideas for a changing world [always selected]

VISION Pillar ⓘ

- Is shaking things up
- Provides value beyond traditional financial products and services
- Is always doing new things [always selected]
- Has modern and fresh ideas [always selected]
- Makes ideas happen [always selected]

BACK CONTINUE

To proceed, click 'Continue', and you will be taken to the next section where you can specify survey screeners. To start over and go back to the Dashboard, click 'Cancel'.

Step 3: Selecting Your Target Audience

You can specify your sampling criteria in this section. The tool permits you to select the Language, Target Audience, and Field Options.

Configure Your Survey - Respondent Screening

CREATIVE UPLOAD KEY METRICS **AUDIENCE & COST** APPROVAL & LAUNCH

✓ ✓ 3 4

LANGUAGE
English

TARGET AUDIENCE: ?
Total Population

STUDY COST: CAD\$4,400.00

Sample Specifications ?

Target Sample Size			
Language	English		402
Country	Canada (EN)		402
Geographies	English Canada		402
Target Audience	RBC Clients		120
Non-Clients		282	
Gender	Male		201
Female		201	
Age	18-29		122
30-45		140	
46-70		140	

BACK CONTINUE

To view your language options, click 'Language' (only English available at the moment) and 'Target Audience' choices, click the drop down menu and select the group you would like to survey.

Please note that your Sample Specifications and Available Data cuts will be different depending on the audience you select, and this information is summarized for you to see.

To proceed, click '**Continue**', and you will be taken to the next section where you will see a summary of your selections and be able to confirm and Launch your test! To start over and go back to the Dashboard, click '**Cancel**'.

Step 4: Launch Your Survey

In this section you will be able to review your survey before launching it. The page will display your Study Name, the Image or Video URL, Storyboard or Image URL for Clickspex, Target Audience, Language, Sample Size, and the Study Cost. If you wish to change your survey **name**, please click on the **'Edit'** tab next to the Survey Name. Remember, you must accept the Terms of Service before you Launch your survey.

Configure Your Survey - Launch

CREATIVE UPLOADKEY METRICSAUDIENCE & COSTAPPROVAL & LAUNCH

VIDEO URL	https://hotspexkyz.s3.amazonaws.com/RBC/49a5b6ed-9f3c-482c-a33c-6b041e2fc85f.mp4
Thumb URL	https://s3.amazonaws.com/hsxvideo/RBC/ENNOMIRCSTICKY30s.jpg
VIDEO TITLE	ENNOMIRCSTICKY30s Edit
TARGET AUDIENCE:	Total Population
LANGUAGE:	English Canada (EN)
SAMPLE SIZE:	402
STUDY COST:	CAD\$4,800.00

Click here to accept the costs outlined above and confirm that you have read and agree to the [Terms of Service](#)

BACK LAUNCH

You will receive a confirmation email that your study has launched, and another email when your test has completed, and your report is ready for download.