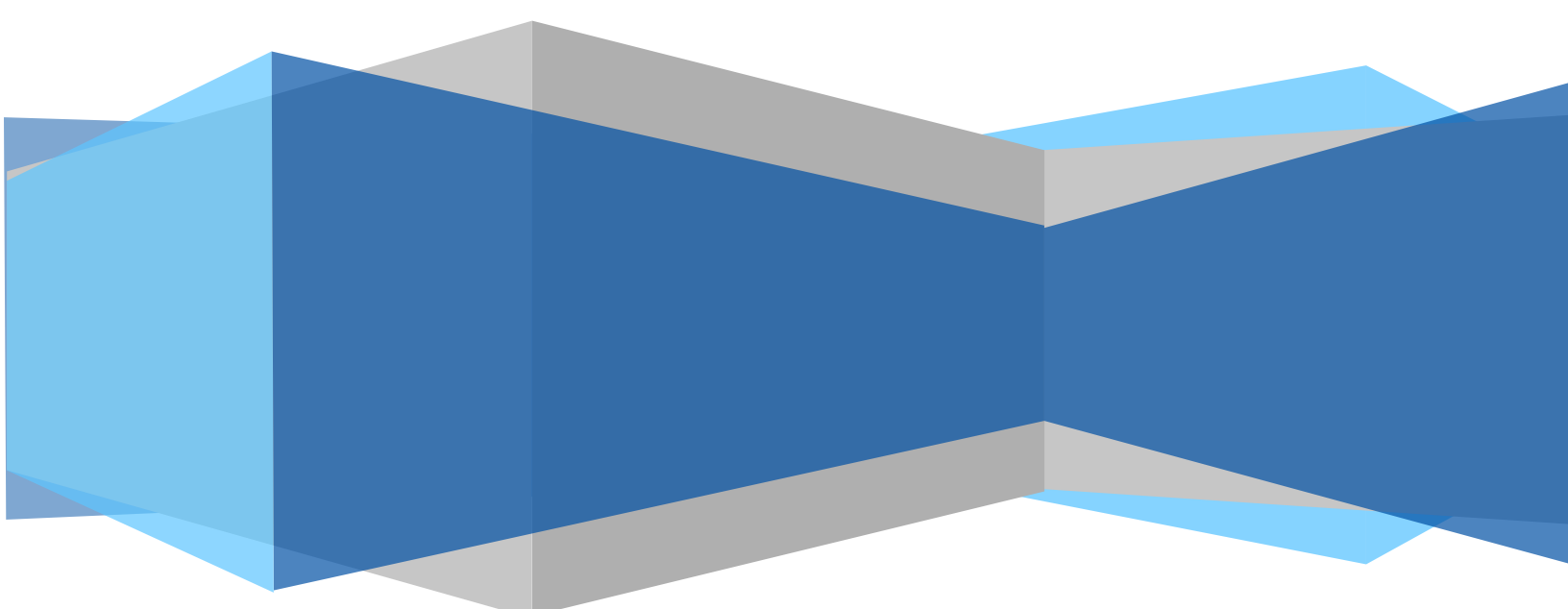




# RBC Ideate Quick Tool Help Documentation

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# 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 screeners, and launching BRI projects.*

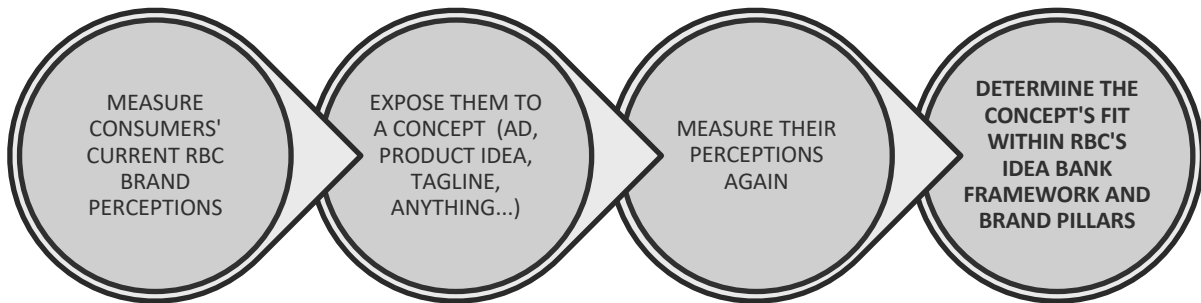
## Scope and Purpose

The primary objective of the RBC Idea Bank Quick Tool Test is to pretest 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 the Idea Bank message.

## Process Overview

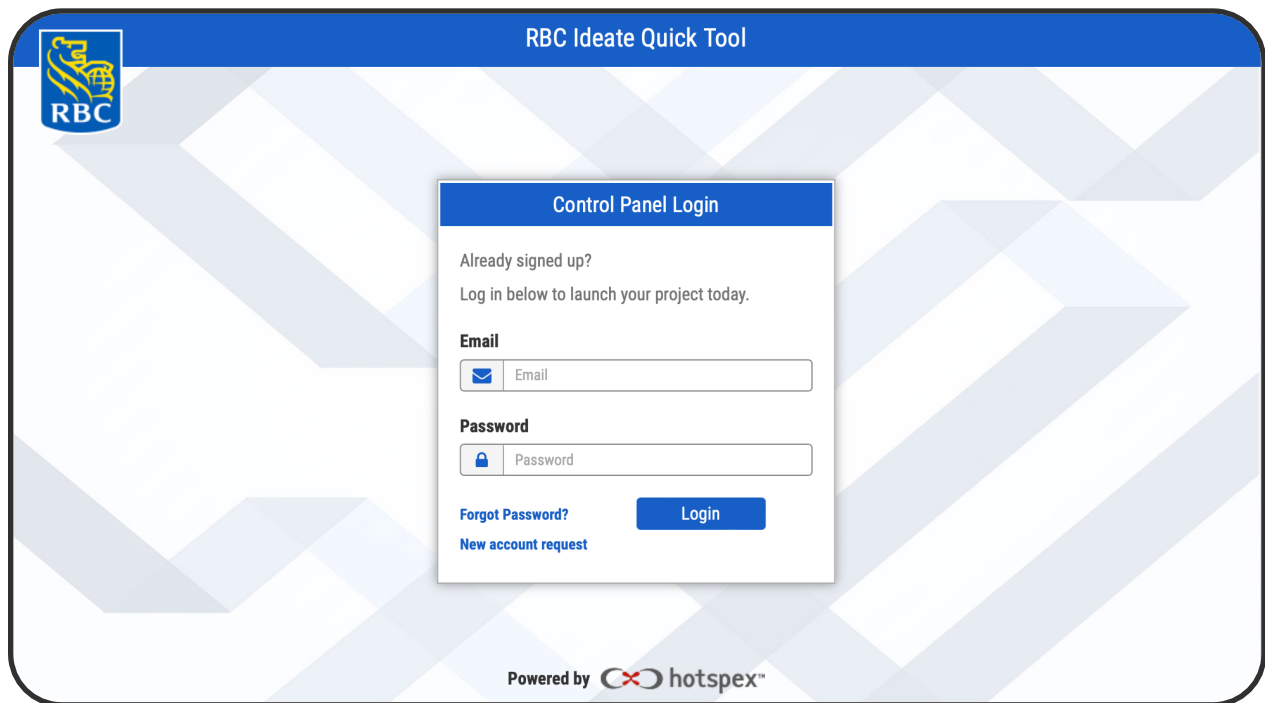


The Ideate Quick Tool lets you upload any Video, Image, or Text that you may want to test. The tool also enables you to set up a limited array of custom survey screeners against desired parameters and gives you control over your DIY surveys. Upon completion of the survey, a report is automatically generated 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

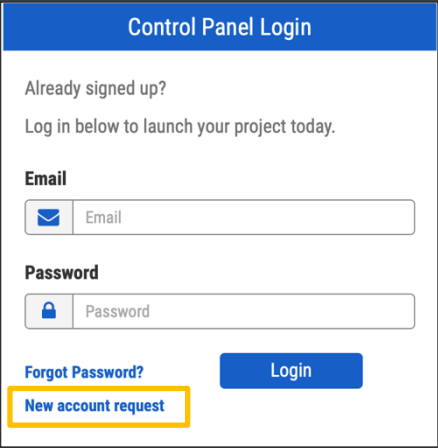
## Signing Up and Logging In

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 something like this:



## Requesting Access

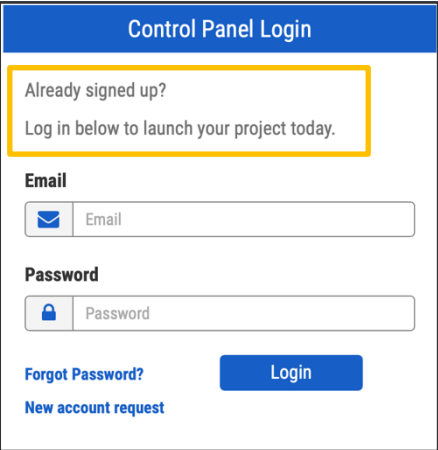
To request a new account request, click on 'Newaccount request.' Hotspex will send you your login credentials within 24 hours of receiving the request. *If you do not receive the email in your Inbox, watch out for it in the Spam folder!*



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

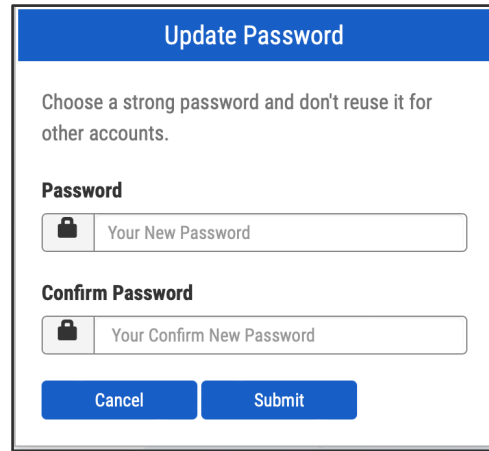
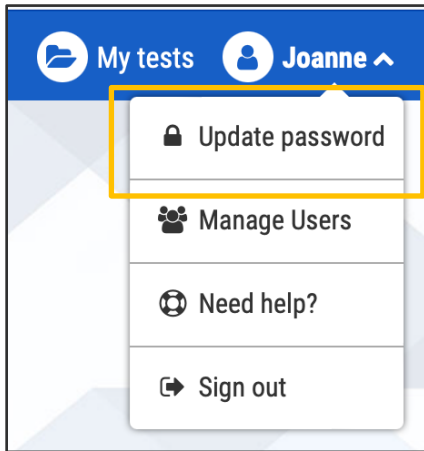
**Welcome to Your Ideate Dashboard!** This is where you can update your password, search help, you're your existing tests, and create new tests.



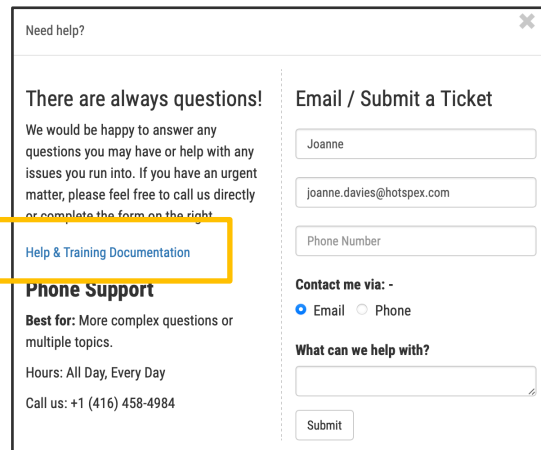
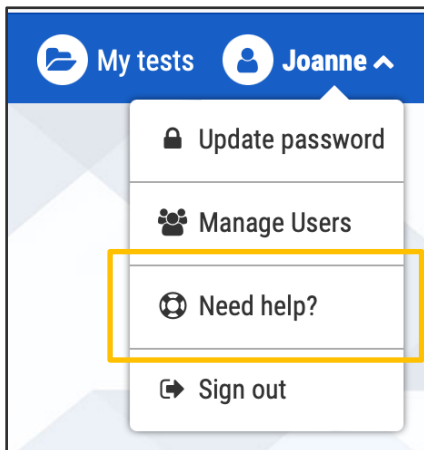
**Quick Tip: At Any Point Click on The RBC Logo To Return to Your Dashboard.**

## 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.



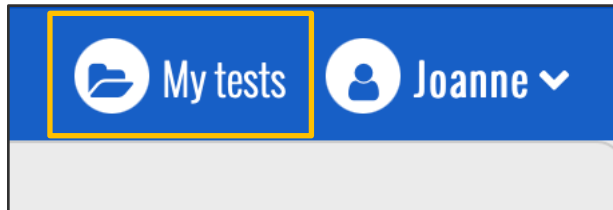
For further help and assistance on the tool, you can also click on 'Need help?' to reach out to Hotspex. You will be directed to a new page where you can submit a help ticket and Hotspex will be happy to assist you, or find a link to this documentation.



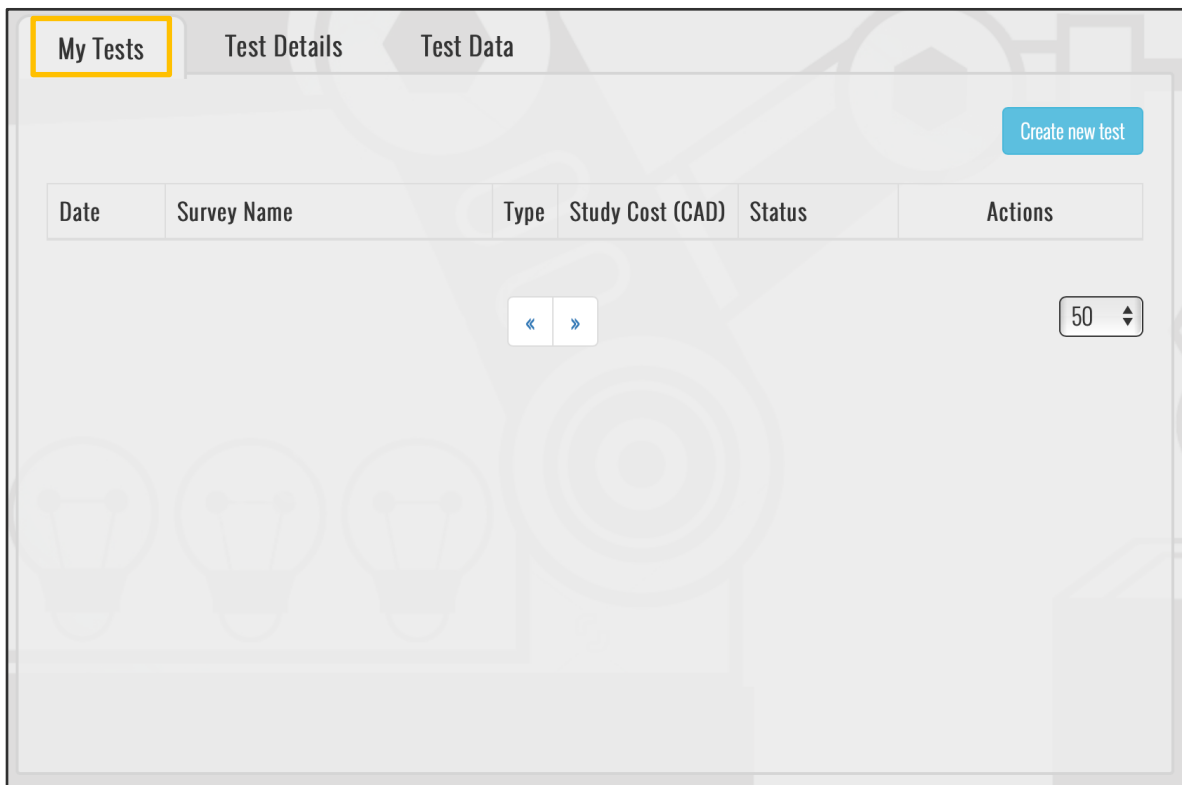


## Viewing Your Tests

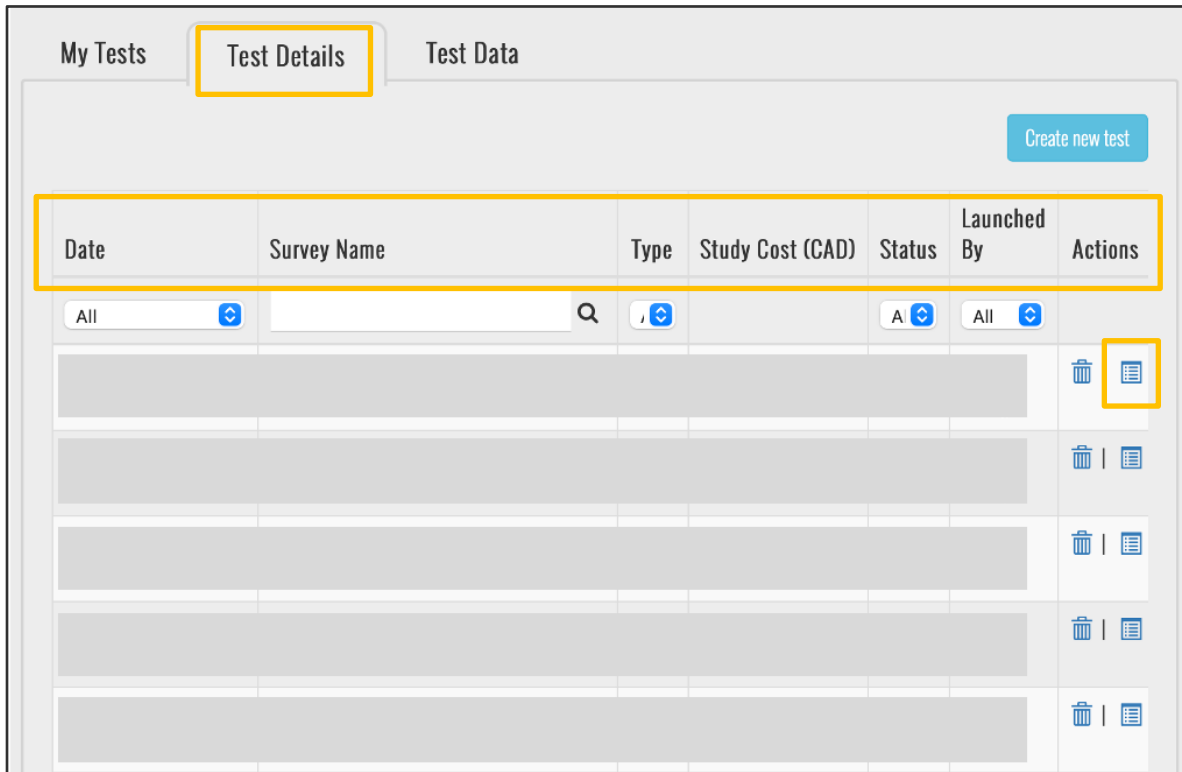
To view existing tests, click on **'My tests'** on the top right corner of the dashboard, next to your user icon. This will load a new page.




On the next page, you can view the tests you have launched under **'My Tests'** tab.

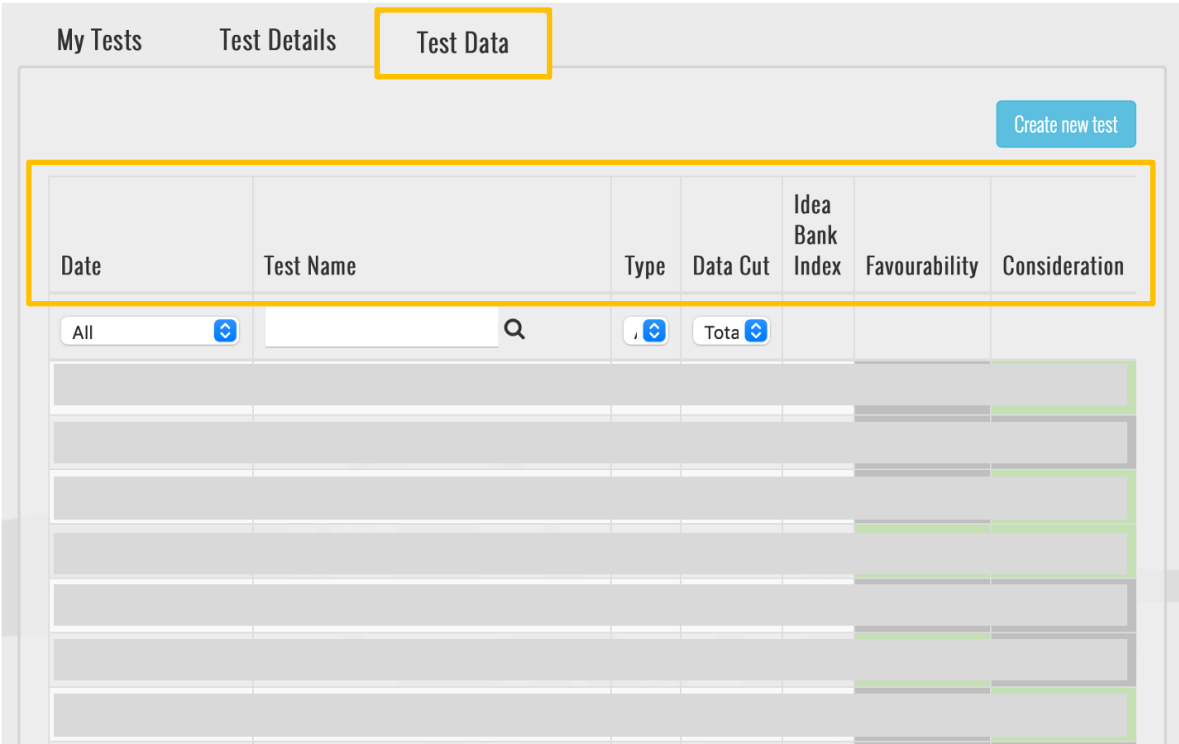


Click on the **'Test Details'** tab to get detailed overview of other tests. The Test Details feature is available to Administrators and it allows them to see all tests launched by any member of the RBC team.

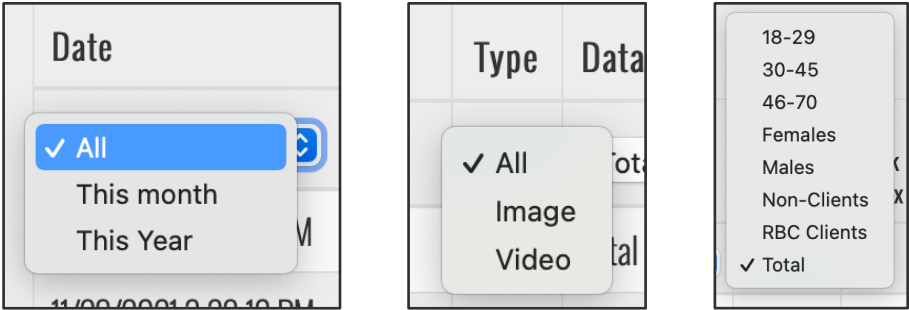


To download a report of your test, click on the report icon (  ) next to the delete button in the **Actions** column. This will save a copy of the test's report to your computer.

Click on the 'Test Data' tab to see a summary of other tests. The Test Details feature is available to Administrators and it allows them to see all tests launched by any member of the RBC team.



You can filter your results by Date, Type, Data Cut, and search for specific tests. Click on the dropdown below them to apply your desired filter.



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

## Creating a New Test



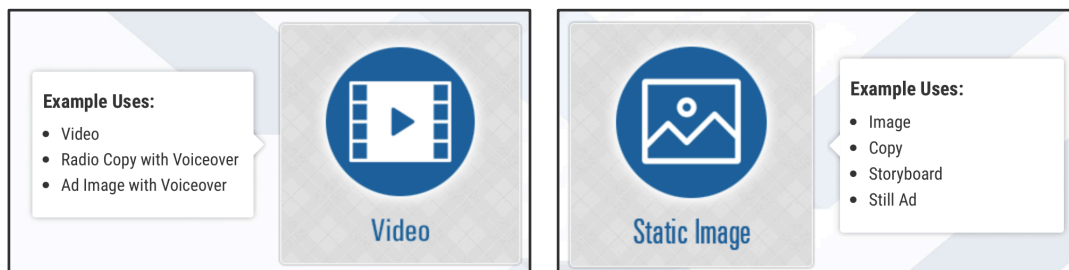
To create a new test, return to your Dashboard and click on the type of stim you want to test.

- 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      KEY METRICS      SCREENING      LAUNCH


1      2      3      4

**LOB:** 

**Product:** 

**Campaign Name:** 

**Creative Stage:** 

**Type of Creative:** 

**Ad Length:**

**Video Orientation:**

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:**

Please wait while we generate a series of thumbnails from your video. Depending on the size and length of the content, this process can take some time (plan on waiting for the length of the video)

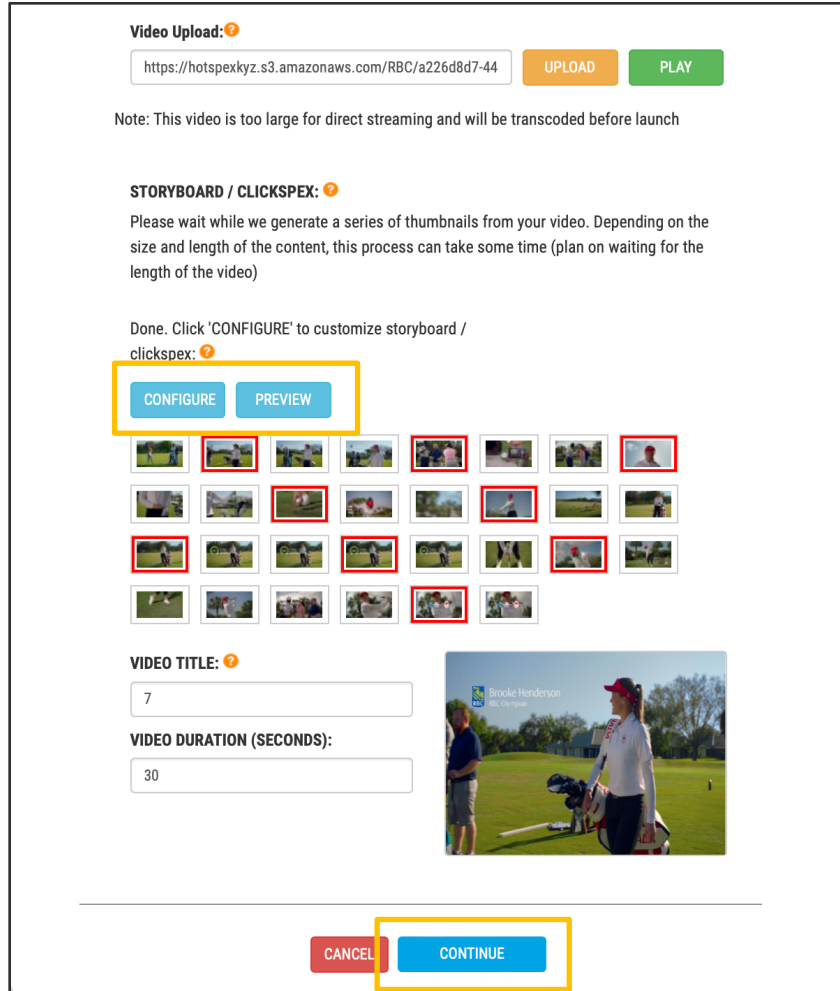
Done. Click 'CONFIGURE' to customize storyboard / clickspeX:

**CONFIGURE** **PREVIEW**

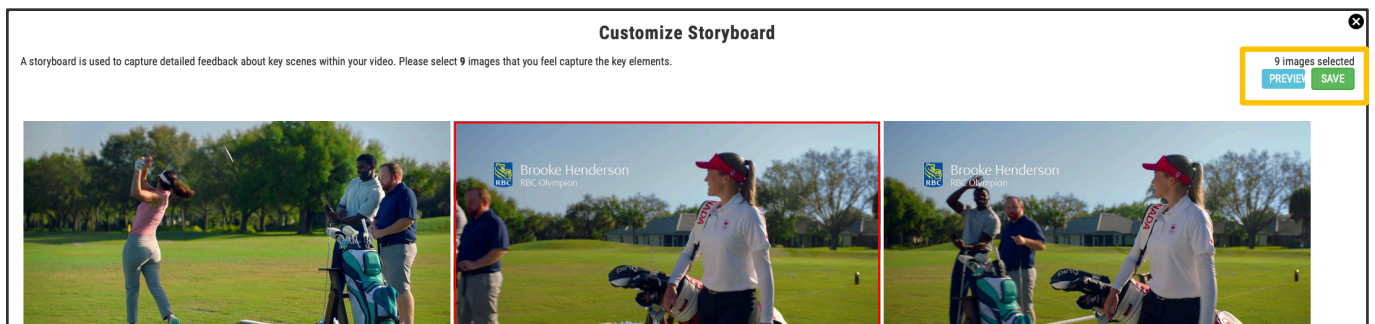
**VIDEO TITLE:**

**VIDEO DURATION (SECONDS):**

**CANCEL** **CONTINUE**



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      **KEY METRICS**      SAMPLE      LAUNCH

1      2      3      4

Consider the objectives or pillars that the overall campaign (and this creative specifically) is intended to support (i.e. Ease, Real, Conviction, Vision).

Please select 3 of the following options:

**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 taking 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      KEY METRICS      **SAMPLE**      LAUNCH

LANGUAGE: English      TARGET AUDIENCE: RBC Clients & Non-clients      FIELD OPTIONS: 50% / 50% Split

STUDY COST: CAD\$4,100.00

Sample Specifications		Available Data cuts	
<b>Target Sample Size</b>			
Language	English		360
Country	Canada (EN)		360
Geographies	English Canada		360
Target Audience	RBC Clients		180
Non-Clients		180	
Gender	Male		180
Female		180	
Age	18-29		120
	30-45		120
	46-70		120

BACK      CONTINUE

To view your language options, click 'Language', 'Target Audience', and 'Field Options' choices, click the drop down menu and select the group you would like to survey.

**LANGUAGE:** English

**TARGET AUDIENCE:** RBC Clients & Non-clients

**FIELD OPTIONS:** 50% / 50% Split

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.

**Configure Your Survey - Respondent Screening**

CREATIVE    KEY METRICS    **SAMPLE**    LAUNCH

LANGUAGE: English    TARGET AUDIENCE: RBC Clients & Non-clients    FIELD OPTIONS: 50% / 50% Split

STUDY COST: CAD\$4,100.00

Sample Specifications		Available Data cuts
Target Sample Size		
Language	English	360
Country	Canada (EN)	360
Geographies	English Canada	360
Target Audience	RBC Clients	180
Non-Clients	180	
Gender	Male	180
Female	180	
Age	18-29	120
	30-45	120
	46-70	120

BACK    CONTINUE

**Configure Your Survey - Respondent Screening**

CREATIVE    KEY METRICS    **SAMPLE**    LAUNCH

LANGUAGE: English    TARGET AUDIENCE: RBC Clients & Non-clients    FIELD OPTIONS: 50% / 50% Split

STUDY COST: CAD\$4,100.00

Sample Specification	Available Data cuts
Total	
Gender: Females, Males	
Banking use: RBC Clients, Non-Clients	
Age: 18-29, 30-45, 46-70	

BACK    CONTINUE

### Configure Your Survey - Respondent Screening

CREATIVE      KEY METRICS      **SAMPLE**      LAUNCH

✓      ✓      3      4

**LANGUAGE:** ⓘ

English ▾

**TARGET AUDIENCE:** ⓘ

RBC Clients & Non-clients ▾

**FIELD OPTIONS:** ⓘ

50% / 50% Split ▾

**STUDY COST: CAD\$4,100.00**

Sample Specifications		Available Data cuts	
<b>Target Sample Size</b>			
Language	English		360
Country	Canada (EN)		360
Geographies	English Canada		360
Target Audience	RBC Clients		180
Non-Clients		180	
Gender	Male		180
Female		180	
Age	18-29		120
30-45		120	
46-70		120	

BACKCONTINUE

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      KEY METRICS      SCREENING      LAUNCH

✓ ————— ✓ ————— ✓ ————— 4

VIDEO URL	<a href="https://hotspexkyz.s3.amazonaws.com/RBC/97c95f37-c735-4a67-bb8d-12f720ca01c4.mp4">https://hotspexkyz.s3.amazonaws.com/RBC/97c95f37-c735-4a67-bb8d-12f720ca01c4.mp4</a>
Thumb URL	<a href="https://s3.amazonaws.com/hsxvideo/Brooke Henderson - MyAdvisor240620220806.jpg">https://s3.amazonaws.com/hsxvideo/Brooke Henderson - MyAdvisor240620220806.jpg</a>
VIDEO TITLE	Brooke Henderson - MyAdvisor <span style="border: 1px solid orange; padding: 2px;">Edit</span>
TARGET AUDIENCE:	RBC Clients & Non-clients
LANGUAGE:	English Canada (EN)
SAMPLE SIZE:	360
STUDY COST:	CAD\$4,100.00

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.