**Portfolio Optimization Exploration**

**Suggested Study Name:** Portfolio Optimization for **[INSERT NAME OF PRODUCT]**

**Objectives:** To identify new opportunities for optimizing a current product or product portfolio by exploring the product experience – from product needs state to product usage.

*Note that the examples provided below use chocolate as the product. Customize the lists in Q3, Q5, and Q7 for your purposes.*

**Email Invite**

**Subject:** What would you do if you were in charge of **[PRODUCT]**?

Hi **[%FirstName%],**

Today we would like to explore your thoughts on **[PRODUCT]**. It is a quick activity that will help us concentrate on developing products that you’re interested in.

**Click here** to get started. Or, copy and paste this link into your browser: **[%ActivityLink%]**

We’re looking forward to hearing what you have to say!

**[COMMUNITY NAME]**

Questionnaire

**[Q1] Past Purchase**

**Question Type:** Multi Choice

Who sees this question? All members

Which of these **[BRANDS or PRODUCTS]** have you purchased in the past 6 months or so?

**[RANDOMIZE]**

**[INSERT LIST OF COMPETITIVE BRANDS]**

None of these **[ANCHOR][EXCLUSIVE]**

**[IF NOT “None of these” at Q1, ASK Q2]**

**[Q2] Variety**

**Question Type:** Single Choice

Who sees this question? Not “None of these” at Q1

Thinking of the brand you buy most often, what **[flavor / size / quantity, etc.]** do you typically purchase?

**[INSERT LIST OF VARIETIES]**

**PRO-TIP: Use this question to explore an aspect of the product’s portfolio that could be used for innovation.**

**[Q3] Reasons for Purchase**

**Question Type:** Multi Choice

Who sees this question? All members

Which of these are reasons that you **[eat / use / buy, etc.] [PRODUCT]**?

**[RANDOMIZE]**

Alleviating boredom

Alleviating stress

Celebration

Energy

Entertainment

Hunger

Indulgence

Pleasure

Post-dinner dessert

Sharing a special moment

Take a break

Treating yourself

Another (we’re listening!) **[ANCHOR][OPEN END]**

No particular reason **[ANCHOR][EXCLUSIVE]**

**[Q4] Experience**

**Question Type:** Long Answer

Who sees this question? All members

We’re curious - could you describe a recent situation where you wanted to **[eat / use / buy, etc.] [PRODUCT]**?

**[Q5] Demand**

**Question Type:** Multi Choice

Who sees this question? All members

Would you **[eat / use / buy, etc.] [PRODUCT]** in any of these circumstances?

**[RANDOMIZE]**

In the morning instead of coffee or tea

During exercise to boost energy

As a snack before bedtime

During an outdoor activity to alleviate hunger

During a break with colleagues

With your children or grandchildren as a special surprise

While cooking dinner

In the checkout line

No particular reason **[ANCHOR][EXCLUSIVE]**

**[Q6] Purchase Interest**

**Question Type:** Single Choice

Who sees this question? All members

How likely are you to purchase **[PRODUCT]** in the next couple of months?

Definitely would buy it

Probably would buy it

Probably would not buy it

Definitely would not buy it

**[Q7] Variety of Selection**

**Question Type:** Multi Choice

Who sees this question? All members

Which of these varieties of **[PRODUCT]** are you interested in?

Almond

Brandy Cognac

Cashew

Dark

Dark Coffee

Hazelnut

Ice Wine

Irish Cream

Milk

Mint

Peanut Butter

Sea Sale Caramel

Soft Caramel

Spicy

Sriracha

Wasabi

None of these **[ANCHOR][EXCLUSIVE]**

**PRO-TIP: Use this question as a possible shareback to the community.**

**[Q8] Ideas**

**Question Type:** Long Answer

Who sees this question? All members

Do you have any ideas for different varieties of **[PRODUCT]** that you would like us to offer?

**[IF NOT “None of these” AT Q7, ASK Q9]**

**[Q9] Product Share**

**Question Type:** Multi Choice

Who sees this question? Not “None of these” at Q7

Think about your next 11 **[PRODUCT]** purchases, which of the varieties would you purchase **the most** of? Select up to three of them.

**[RANDOMIZE][MIN OF 1 | MAX OF 3]**

**[PULL THROUGH SELECTED ANSWERS AT Q7]**

**PRO-TIP: Use this question and variety selection (Q7) to identify the ideal set of product varieties for the greatest market appeal.**

**[Q10] Share**

**Question Type:** Long Answer

Who sees this question? All members

Fantastic. Thanks so much for your feedback. Do you have any additional ideas that could help us improve our **[BRAND & PRODUCT]** that you would like to share with us?

**Survey Complete**

**Question Type:** End Survey

Who sees this question? All members

That’s it! Thanks so much for your time to let us know your thoughts about our **[BRAND & PRODUCT]**. Your feedback will be incredibly valuable as we look to enhance our products.

We really appreciate the feedback and look forward to hearing from you again soon.

Thanks again!

**[COMMUNITY NAME]**

**Color Coding**

**Pro-tips**

**Input needed from you [customer]**

**Sparq pipe**

**Sparq settings**

**Sparq logic**