

Building and Engaging a Successful B2B Insight Community

The image shows a woman with glasses and a white shirt, smiling and holding a smartphone. In the foreground, a smartphone displays the Reach3 RIVAL chat interface. The interface has a dark header with the Reach3 RIVAL logo and a navigation bar with tabs: CHATS, PARTICIPANTS, DATA, SETTINGS, and DALE EVERNDEN. Below the navigation bar, there's a section for 'All chats / Research' with a 'Published' status. The main content area is titled 'Summary' and shows four large numbers: 375, 140, 80, and 1,290. Below this, there's a 'Invitations' table with columns for Name, Status, Steps, Entered, Incomplete, Disqualified, Completed, and Actions. The table lists two invitations: 'Invitation - Main Launch' (Open) and 'Invitation name' (Pending). The 'Invitation - Main Launch' row shows 95 entered, 100 incomplete, 50 disqualified, and 1250 completed. The 'Invitation name' row shows 0 entered, 0 incomplete, 0 disqualified, and 0 completed. The table also includes a 'Total' row.

Name	Status	Steps	Entered	Incomplete	Disqualified	Completed	Actions
Invitation - Main Launch	Open	<ul style="list-style-type: none"> OPENED: 2021-07-19 / 9:00 AM (PST) DELIVERED: 1495 / 1495 participants CLOSE NOW 	95	100	50	1250	...
Invitation name	Pending	<ul style="list-style-type: none"> OPEN MANUALLY TARGET: ~50 participants CLOSE MANUALLY 	0	0	0	0	...
Total			-	-	-	-	

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Introduction

In many ways, managing a B2B insight community is no different than a B2C one. But there are some nuances you have to keep in mind to maximize engagement and get more value from a B2B community.

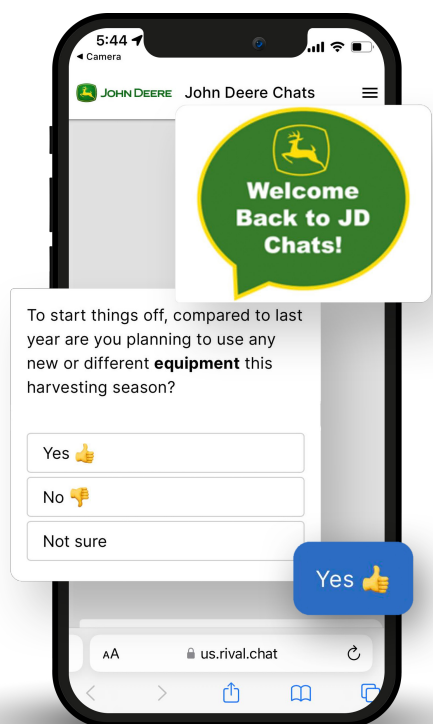
At Rival Tech and Reach3, we've launched and managed dozens of B2B communities across major industries like tech, CPG, retail, health care and media. Our mobile-first, **conversational approach** (now **powered by AI**) has proven to be a valuable way of getting rich, in-the-moment insights from IT professionals, doctors, farmers, marketers, restaurant employees, and other types of B2B audiences.

In this short guide, we'll reveal best practices we've learned and tips on applying them to your own community.

1. Set Clear and Transparent Objectives

Start by defining what you want to achieve—and communicate that to your members. Being clear about the community’s purpose, whether it’s gathering input on new product ideas or improving service offerings, helps participants understand their role and the value of their involvement. B2B customers are more likely to engage when they know the purpose and expected outcomes of their contributions.

“Incentives are essential in B2B communities, but they should **align with business objectives.**”



2. Name Your Community Purposefully

A professional and meaningful name can elevate the perception of your community. Consider titles like “[Your Brand] Customer Advisory Board” or “[Your Industry] Leadership Council.” This conveys the purpose, respect, and impact of their participation, reinforcing a sense of importance and professionalism.

3. Offer Relevant and Valuable Incentives

Incentives are essential in B2B communities, but they should align with business objectives. Consider a blend of intrinsic and extrinsic rewards:

- **Intrinsic:** Exclusive insights, early access to product launches, or special reports that provide value to their business.
- **Extrinsic:** Tangible rewards like whitepapers, industry benchmarks, or custom insights.

The majority of B2B communities should either offer individual incentives per engagement or a simple-to-understand points program designed to reward early and often.



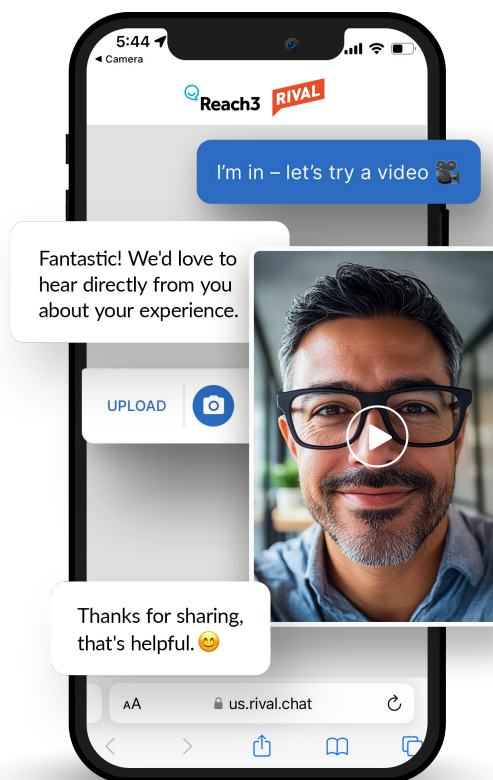
4. Focus on Short, Frequent Engagements

One of the benefits of insight communities is the ability to ask a small number of questions at regular intervals. Keeping engagements brief—just a few minutes—enhances response rates and builds participant trust, making them more likely to answer frequently and giving you valuable, consistent data over time.

“Use your **research community** as an opportunity to deepen connections.”

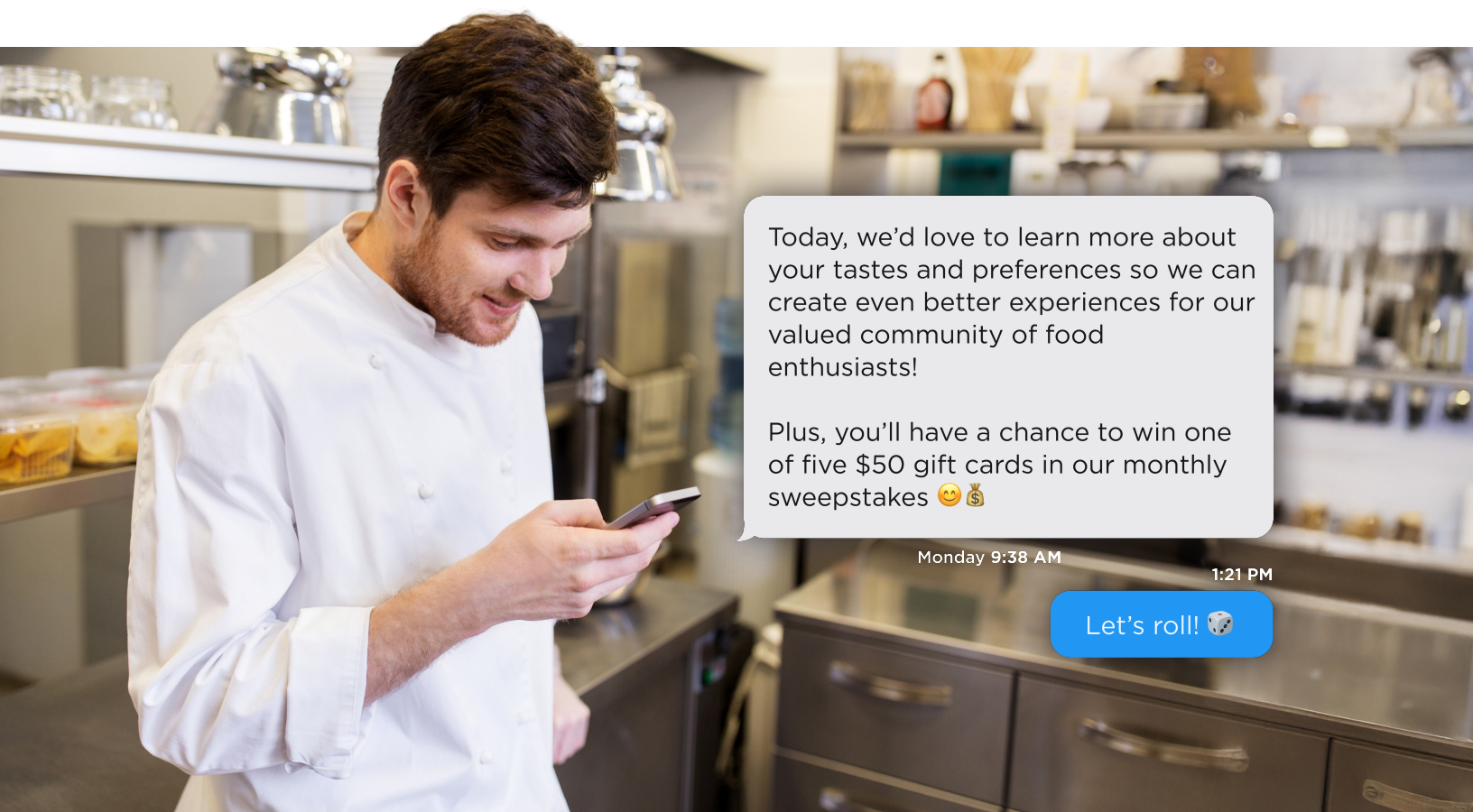
5. Build Rich Profiles with Integrated Data

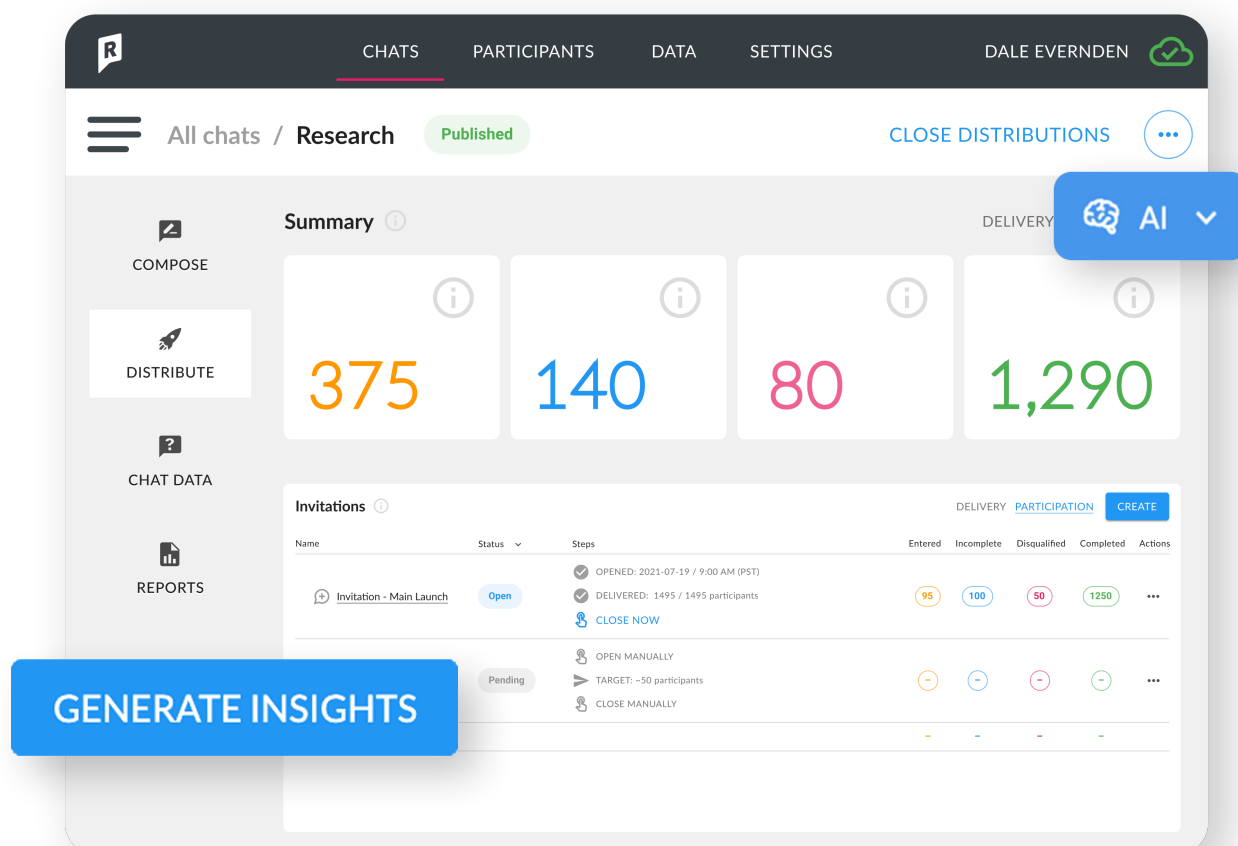
Use CRM data, past customer interactions, and usage data to complement direct research creating a profile that allows for targeted research and provides a personalized experience for each customer. Ask crucial profiling questions sparingly to avoid survey fatigue—once or twice a year is ideal.



6. Treat Research as Relationship Building

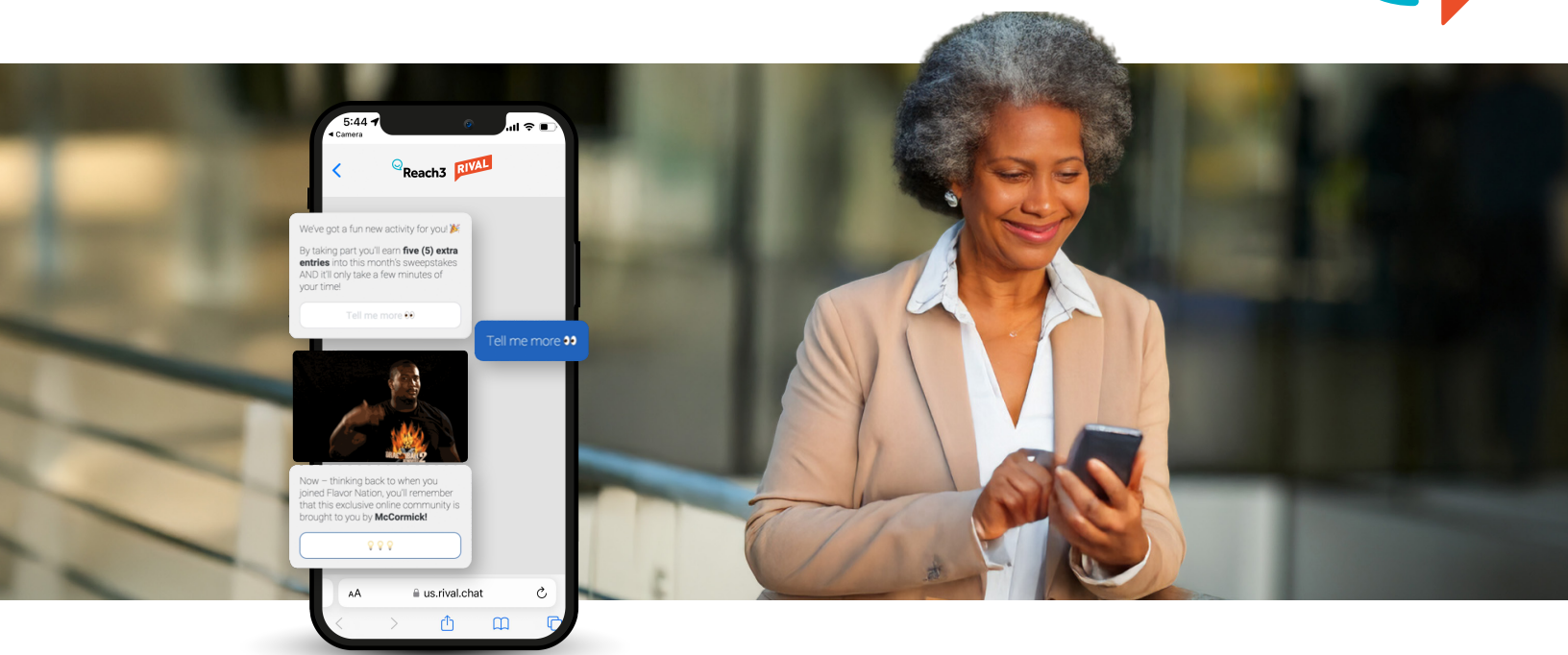
In B2B, relationships are long-term and valuable. Use your research community as an opportunity to deepen these connections, integrating insights into your overall relationship management. Continuous engagement builds loyalty, while demonstrating that their input directly impacts business decisions strengthens trust.





7. Prioritize Confidentiality and Compliance

Assure participants that their data is confidential and used solely for research. B2B customers often have unique privacy concerns, so clarity on data handling—especially around sensitive information—is essential. Communicate confidentiality policies upfront and follow best practices to maintain trust. Continuous engagement builds loyalty, while demonstrating that their input directly impacts business decisions strengthens trust.



8. Close the Loop by Sharing Impact

After each round of research, follow up by showing participants how their feedback influenced decisions. Share high-level summaries or specific actions taken based on their input. This simple step reinforces the value of their contributions and encourages continued participation.

Following these guidelines will help you build a B2B insight community that not only gathers valuable data but also strengthens client relationships and positions your brand as a trusted partner.



Looking to Build a B2B Insight Community?

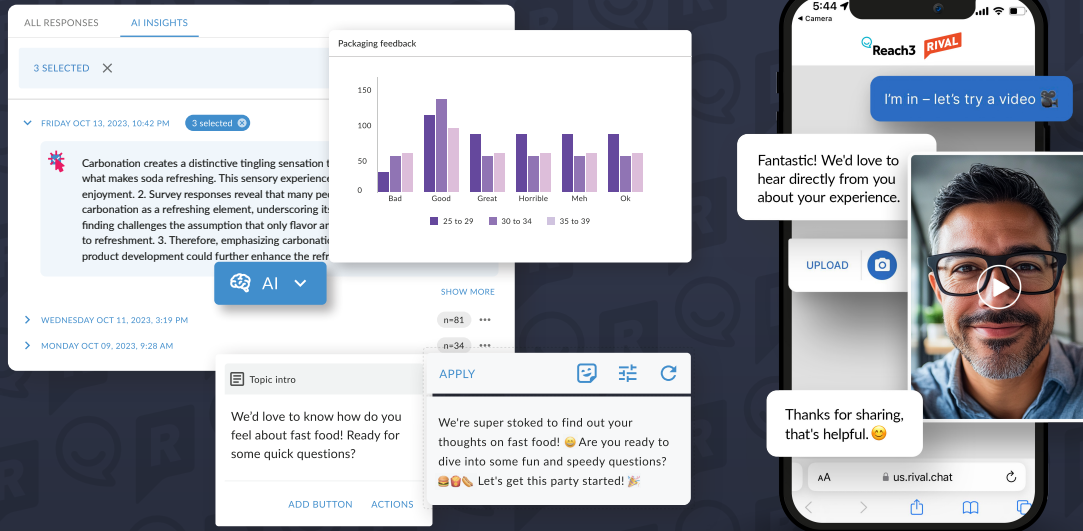
Reach out to learn how a conversational, mobile-first approach can help you get accurate, ongoing insights from your most important audiences.

reach3insights.com

rivaltech.com

Community 2.0

Insight Communities Reimagined,
Powered by Conversation and AI



ENGAGEMENT

87%

Completion
rate

DEPTH

7x

Words with
video responses

SPEED

40%

Completes in
under an hour

RESULTS



Business
outcomes

Increase engagement and get closer to your customers
using an agile, conversational research platform

reach3insights.com/community-2.0

rivaltech.com/community



RIVAL GROUP COMPANIES