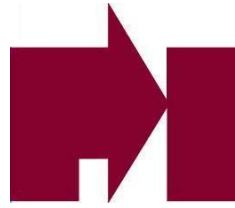


# What Do *You* Want To Know?

*A Guide to Getting the Most from Your Research*



The Voice and Values of Research  
**CASRO**<sup>®</sup>  
COUNCIL OF AMERICAN SURVEY RESEARCH ORGANIZATIONS<sup>®</sup>



Marketing Research Association



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So you want to do some research. You've spent considerable time talking internally about what you want to know. You have a pretty good idea about what you hope to learn. But what should you expect from your market research company? And what does your research company expect of you? The answer to those questions could make a huge difference in the return you receive on your research investment.

It all begins with communication. All parties involved in the project must communicate clearly and frequently throughout the entire research process to ensure that all agendas are being met. The starting point is to define your objectives, expectations, deadlines, and costs at the very beginning.

### ***Answering these six questions before you contact a research firm often helps facilitate a faster, more precise response:***

#### **Who needs to be interviewed/surveyed?**

Knowing who you want to answer your questions helps narrow the search for a sample group. Finding the appropriate sample is one of the most critical parts to a successful research project. Do you have a list of clients/customers that you can provide? Is it accurate and up-to-date? Appropriate Sample Group = Strong Starting Point!

#### **What do we need to learn from these individuals?**

Make sure you know what you are trying to achieve before you call in the researchers. Considering how you intend to use the research results sometimes helps answer this question.

#### **Do you have any preference for the approach that should be used?**

It is always helpful to know if you have a specific way that you feel the research should be conducted. There are many pros and cons for one approach versus another; for example, phone versus online. Disclosing your preference helps the research firm zero in on your needs and expectations and helps them advise you on what they feel is the best methodology for the project.

#### **How soon do you need the results?**

Timing is everything. A quicker response sometimes requires a different research approach than an extended deadline. Above all, be realistic.

#### **At least in general terms, what is the budget?**

Having a figure in mind helps the researcher to give you the most accurate picture of the bottom line. Revealing the maximum you can spend, or at least a dollar range, provides a critical parameter for designing a feasible project and helps answer the question, "What's the maximum return I can get for my research dollars?"

### **What degree of confidence or margin of error is needed?**

The answer to this question will determine sample group size and ultimately pricing of the project. Generally, the larger the sample group, the smaller the margin of error and the more confidence management can have in the results.

After answering these questions as best you can, you are ready to contact a Research Firm for a proposal.

## **The Research Proposal**

A proposal is a written document that summarizes all steps involved in the research project. The proposal should contain answers to the following:



- ***The purpose of the research.*** What are your goals and objectives? What expectations do you have? What do you want to learn from this research? How will you use the findings?
- ***The scope of work.*** What methodology is appropriate (phone vs. one-on-one interviews, online survey vs. focus groups)? How many people should be interviewed? Who will provide the contact list? Will offering an incentive encourage participation?
- ***The deliverables.*** How will the data be analyzed? In what format will I see the results? Will there be a final presentation to review the key findings and to resolve any unanswered questions?
- ***The timeline.*** How long will each stage of the research process take? Is there a hard deadline to work against?
- ***The budget.*** What is the total fee for the project? How much will be added to the total cost if the sample size is increased, or if the data needs to be analyzed a particular way? Are travel costs included or billed separately?

## **Project Initiation Meeting**

Once the proposal is agreed upon and signed, the research project is ready to begin. The next step is a Project Initiation Meeting. The purpose of the Project Initiation Meeting is:



- To meet all individuals involved in the research process, exchange contact information, and assign appropriate tasks.
- To understand in detail why the project is being pursued and who will see and use the results.
- To discuss any unresolved issues or questions regarding the project.

- To brainstorm development of the questionnaire, recruiting screener, or moderator's guide.
- To finalize deadlines and expectations of deliverables.

It is preferable for this meeting to take place in person, but since that is not always possible, it is important to note that often this meeting takes place via a conference call.

## Regular Progress Reports

After the Project Initiation Meeting has taken place, the survey instrument is approved, and the logistics are finalized, the fieldwork gets underway. To ensure that everyone involved is up-to-date on the process, Regular Progress Reports should be generated by the research firm you are using. This value-added service is a valuable communication tool and typically includes the following types of information:

- Total number of surveys completed/received for the week and overall totals for the project.
- Positive or negative feedback on the process, or positive or negative comments received from the respondents.
- Overall status of the project and if everything is on track to meet the next deadline.
- An opportunity to raise questions or concerns about the process, timeline, etc.

It is also very important during these updates to send a distress signal if a project is veering in an unexpected direction. This helps you to steer clear of any nasty surprises later on, and gives everyone a chance to adjust to work as necessary.

## The Deliverables

Once fieldwork is complete, it is time to analyze the data and report the findings in a clear, coherent manner. There are several different deliverables you would normally expect to receive upon project completion:

- **Top-line memo.** The top-line memo is a preliminary document that summarizes the key findings to the research. This memo is released very soon after the fieldwork is complete and the data is tabulated and proofed, and before the final report is compiled.
- **Final Report.** The final report is a document that displays all of the results from the research conducted. These reports should explain the background and purpose of the research, outline detailed charts for each



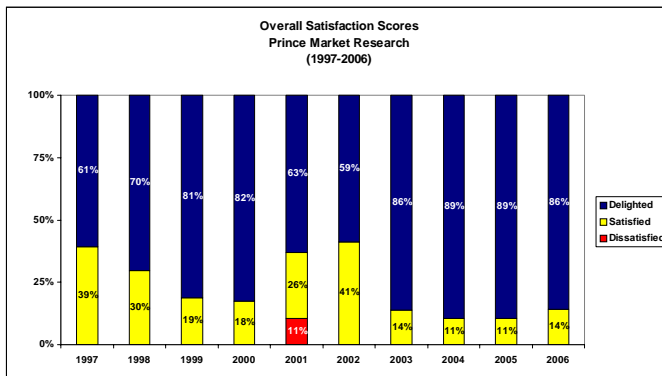
Preparing  
**MORE than  
DATA**

question, and include a key findings and/or conclusion section. It is helpful if the report contains an Appendix, which includes a copy of the questionnaire and verbatim responses to any open-ended questions.

- **Final Presentation.** The Final Presentation is a condensed version of the Final Report that is presented by a principal of the research company to senior management and key members of the research team.

## Customer Satisfaction Survey

After the project is complete, the results have been delivered, and a meeting to review the findings has occurred, a Customer Satisfaction Survey should be sent out to the key individuals involved in the project. Clients should rate their market research company on the following factors:



- Overall Satisfaction
- Timeliness
- Deliverables
- Communication
- Overall Value

Clients should also have the opportunity to provide positive feedback on the research process, as well as suggestions for improvement.

## Eliminating Communication Barriers

Although the market research firm you select should lead the communication exchange, all parties involved are responsible for keeping the lines of communication open and clear. Keep the following in mind as ways you can help to eliminate communication barriers between you and your research firm:

- Define expectations in the beginning. Outline what you expect and when you expect it.
- Don't be afraid to ask questions.
- Designate one contact to be your "go to" person and be sure that person is involved in all communication regarding your project.
- Keep a file that contains written documentation of all relevant changes to the scope of work, timeline, and budget.
- Be responsive. (to a request for survey review, for example)



- Be flexible.
- Anticipate potential problems and try to solve them before they become a roadblock in the research process.
- And most importantly, communicate constantly throughout the entire process, from project initiation to fieldwork to final analysis.

Whether your goal is to re-brand your company, understand your competition, or determine customer satisfaction and loyalty, a great research experience begins and ends with effective communication. It's the key to success! Can we talk?



*What Do You Want To Know?*

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