



Business Enhancement Series

PART 3: Developing a Proper Research Brief

To discuss this article or your business enhancement needs, contact Gordon on gordon@batbrand.co.za

In the previous article in this three part series we talked about the importance of knowing exactly what it is that you want to find out when deploying market research. The heart of successful market research lies in a well thought through, clear and comprehensive research brief.

More often than not, research briefs can be paltry, inadequate, vague and lacking clarity of purpose and objectives in relation to the business or marketing issue at hand.

This makes it extremely difficult for the researcher to accurately tailor-make a methodology and solution that will be effective and provide value to the client.

Moreover, it creates the temptation for the researcher to simply plug-in a “latest fad” methodology.

A quality brief is the first step in achieving a quality research project.

In this video and article, we will share with you the vital ingredients required to craft a quality research brief.

Here goes ...

Bateleur is a full service corporate member of the Southern African Marketing Research Association. Bateleur subscribes fully to the Association's stringent code of practice for ethical and quality standards.

To begin with, it is always a good idea to share the **market backdrop** with the research agency. That is, to provide a short description of pertinent past, current and anticipated issues relating to the market in which your company operates.

This gives context to the brief and provides a foundation for the subsequent brief.

Market research sometimes happens automatically, such as continuous tracking surveys. However, many projects are initiated because of a specific circumstance that has generated the need for research. It is a good idea, to go on to provide a short description of the **background leading up to the need for research**.

In other words, what are the circumstances that caused the need for the research in the first place?

And now for the DNA of the brief!

The **purpose of the project**. What is the main purpose of the research? In other words, what are you going to use the results of the research for?

Every business or brand planning scenario presents executives and strategists with information gaps. It is impossible to know everything.

But some information gaps are crucial to fill!

Clearly identifying such gaps will be the first step in outlining and defining the purpose of the project. From then on, the brief flows naturally.

From the project purpose comes the set of **project objectives**. This is best, and most easily, thought of as being the questions that you would like the research to answer? Here it is important to avoid the vacuum cleaner approach referred to in the previous

video and article, but to rather define objectives within the bounds and borders of the purpose of the project.

In many instances, the information gaps identified present themselves in the form of **root hypotheses**. Quantitative research is especially good at confirming or denying hypotheses. If there are any root hypotheses to be proven or disproven, now is the time to state them in the brief. That is, along with the project objectives.

Now that we know where we are headed - the purpose, objectives and hypotheses - the next part of the brief goes on to the business of how we will get to this destination.

Whilst in the previous video and article we cautioned against specifying the research methods in the brief, it is quite okay to **share any preconceptions you and your colleagues may have about the methodology**.

Just make sure that they are preconceptions rather than prescriptions.

Then, be open-minded to what the research agency recommends in respect of methodology.

Some research projects need to take specific considerations into account. These specific considerations may relate to matters which could be legislative, company policy, logistics, ethics, confidentiality and so forth. Consider whether there are **any specific issues that need to be taken into account in the specification and execution of the research**. Then, include these in the brief.

It is a good idea to include in your brief a specification of the **geographic location** you wish to cover. Typically the geographic location will be defined by the places in which your primary research target market can be found.

It is often a good idea to adopt Pareto's principle, and asked the question as to which 20% of your target market's catchment area yields 80% of sales. Then, focus your research interviews in the primary catchment area.

Attempting to cover the entire catchment area will often have the effect of increasing the cost of the research. This is especially so in the case of personal interviews.

Naturally, it is vital to include a **clear definition of the target market** in the research brief. This boils down to defining the types of respondents to be included in the research. In addition, definable subsets, or segments, need to also be described where necessary.

Research programs invariably fit into a complex set of other, interdependent, business and marketing activities. It is most usual that research activities are upfront and early in the project plan. This means that research is very often time critical and has already been allocated a timeline on the critical path.

Be sure to include **clear timing constraints** in your brief. Let the agency know by when you expect, or desire, the final results of the research.

It is very often left up to the research agency to develop a quotation. As with any industry, there are many ways to skin a cat, some less expensive than others. If you have already set a budget aside, share this with the research agency in your brief. The sharing of **budget constraints** will save a lot of time and anguish in going back and forth negotiating price and project scope.

At very least, share your anticipated or desired price range with the research agency.

Lastly, it is a good idea to **define the deliverables** you require at the end of the project. This could include the types of reports, tables and presentations. It could also include

things like the raw data for internal analysis. It could even go on to include business and brand planning workshops designed to translate the research into action.

Remember that these deliverables may have an impact on the price of the research.

Once you have concluded the construction of your research brief, and achieved agreement about its content from colleagues who will be using the research, share it with your research agency and field any questions they may have. Come to an agreement as to when to expect a proposal in response to your brief.

By developing a clear and comprehensive research brief, you are setting the foundation upon which a quality research project can be built.

In summary, you can use the following checklist for quality research briefs:-

1. Share the market backdrop - a short description of past, current and anticipated issues relating to the market.
2. Provide a short description of the background circumstances leading up to the need for research.
3. Define the purpose of the project, specifically describing what the research results will be used for.
4. Develop a set of specific project objectives. In other words, the questions that the research should answer.
5. Identify and define any root hypotheses that need to be confirmed or denied by the research.
6. Share any preconceived methodologies in respect of executing the research. Remember to be open-minded to alternatives, however.
7. If applicable, table any specific issues that need to be taken into account in the specification and execution of the work.
8. Specify the geographic location to be covered by the research.
9. Provide a clear definition of the target market, including any sub segments to be included in the analysis.
10. State timing constraints and project critical path requirements.
11. If possible, include budget or anticipated price range.
12. Clearly define expected deliverables.

A strong research brief leads directly to strong research proposal.

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