



redshift
research

Briefing a Market Research Agency

Purpose of this session is to explain why we ask you specific questions at the beginning of the project and what we do with the information

- Planning a Research Brief
- Writing a Research Brief
- Background and Business Objectives
- Research Objectives and Approach
- Deliverables and Timings
- Budget, Contacts and Submission
- Reviewing Proposals
- Briefing Meeting
- What to expect

Planning a Research Brief



Writing a research brief is an essential first step in any market research exercise

Planning your brief is key, the more time spent planning the research the better the outcomes are likely to be, consider the following when planning:

- **Define the business objectives** - *what do you want from the research? What will you want to do with the results?* Developing the business objectives may need to involve other relevant departments
- **Prioritise objectives** - there is often a tendency to include 'nice to have' issues. The more focused the objectives the more focused the results
- **Project timelines** - particular methodologies will have a strong bearing on a project. The scale of a projects will affect timings as will any interim reviews
 - If you need to test prototypes these dates should be known
- **Budget** - *how much budget is available? Is it approved?* Talking to an agency first to get an understanding of ball park costs will save a lot of time later

Writing a Research Brief



A brief should be concise, yet outline key information. The following headings provide a general template:

1. Background
2. Business Objectives
3. Research Objectives
4. Preferred Approach and Methodology
5. Deliverables
6. Timings
7. Budget
8. Contact Names

Prior to writing a full brief it might be useful to complete Redshift's *Research Request Form*

A screenshot of the Redshift Research Request Form. The form is titled 'Research Request Form' and contains several sections for providing project details. The sections are: Project Name, Sponsor contact details, Anticipated Project commission date, Research Objectives, Research outcomes, Research Scope, Methodological considerations, Outputs, Timescale, and Budget. Each section has a corresponding text input field. At the bottom of the form, there is contact information for Jane Hayes and Elin Mortimer, including their email addresses and a phone number.

Background and Business Objectives



1. Background

Putting the project in context, ideally covering the following:

- Why the research is needed.
- Relevant issues to the project, e.g. Established protocols, competitive landscape
- Information on size and structure of the customer base, target audience, sales figures, product properties and uses, historical habits or changes in the market etc.

2. Business Objectives

Business objectives help focus the research process and will be the elements that the success of the research may be judged on. A business objective may be:

- Generating extra revenue out of a specific channel
- Ensuring that the transition between manufacturing sites is not noticed by customers
- Identifying possible new market opportunities
- Becoming the supplier of choice

Research Objectives and Approach



3. Research Objectives

What are the core information objectives necessary to meet the wider business objectives?

- Identifying attractive product features
- Identify problem areas for customers
- Understanding reasons for satisfaction or dissatisfaction
- Identifying suitable price points

4. Preferred Approach and Methodology

If a similar project has been conducted before, highlight it. Alternatively if you know you want strong figures on which to base decisions or illustrative quotes for marketing literature, now is the time to say.

- Sample considerations. E.g., will it be realistically possible to obtain customer details from dealers?
- **Redshift will then discuss specific methodologies to suit needs and budget**
- But responding agency should always review options, and if necessary make additional recommendations for the most appropriate approach

Deliverables and Timings



5. Deliverables

Detail the specific deliverables you require, the quantity and depth of deliverables can have an impact on costs.

- Traditional full report vs annotated presentation
- Transcripts vs qualitative summaries
- Raw data vs data tables vs eReports
- Video clips and Vox pops
- Number of presentations to be given (and their location)
- Interim meetings/presentations required (teleconference vs personal meetings)
- Information dissemination workshops

6. Timings

What is the key launch date? What are the key reporting dates? How flexible are these?. Considerations are:

- Scale of the exercise
- Methodology (qualitative research often takes longer and quantitative)
- Ease of contacting respondents

7. Budget

Generally, agencies prefer to be given notice of the available budget

- Larger budgets offer greater scope for larger programme with multi methodologies
- If unsure about what budget would be required most agencies can give an indication of likely costs before a formal brief is provided
- Has the budget been approved yet?

8. Contact Names

Include details of ultimate end client and preferred primary contact for day to day issues

Briefing Meeting



Following the review a briefing should be held with the chosen market research agency

- The briefing meeting can provide the opportunity to discuss the project in further detail and develop a relationship between you and the agency
- Confirm who will be the day-to-day contact at both agency and client end
- Discuss any perceived difficulties and the impact they may have. This is best done at the beginning rather than being an unexpected surprise later
- Ensure responsibilities and time scales are clear, i.e. who is providing sample, who is undertaking translations, preferred choice of research venues etc.
- Discuss terms and conditions of the research i.e. Completion of a supplier SAP form, agree payment schedule, agree key milestones etc.

Only after the briefing should you agree terms and sign agreements

What to Expect



When working with a market research agency, you should receive the following:

- A detailed timing plan
- An invoice schedule
- Regular updates on progress and timescales
- The opportunity to review and give feedback on questionnaires
- Draft presentations (some agencies require notification for this)
- Other deliverables, e.g. Data tables