GUIDE + TOOL

Mastering the Research Brief

Professional Mastery Series

Step-by-step guide with expert advice and techniques for briefing a qualitative or quantitative research project, with Ruby Cha Cha's Ellen Baron.

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Read this first

THIS DOCUMENT WAS CREATED FOR MARKETERS TO BRIEF A RESEARCH AGENCY ON A BUSINESS ISSUE WHICH REQUIRES INPUT FROM AN EXTERNAL AUDIENCE. IT COULD ALSO BE USED BY GOVERNMENT DEPARTMENTS OR NOT-FOR-PROFIT ORGANISATIONS.

Q: How is the research brief used internally by a research agency?

Ellen Baron: *Think of the researcher as a pharmacist needing a prescription. The pharmacist was not in the doctor's room when the patient presented with symptoms. But getting the script right will help the patient on their way to good health and potentially save them money. Research agencies are often brought in later in the process to help solve a particular marketing problem. They have little or no background on the symptoms, the stakeholders or the brand (if new to the client). Researchers rely heavily on the brief to fill in gaps, provide background, and outline boundaries of what is in and out of scope. It helps them understand what actions are expected to be taken with the results.*

The research brief should generate some questions for the agency to consider and explore with the client in a face-to-face meeting. It must be fluid enough to allow challenge and fresh thinking to approaches, designs, samples and outputs.

Q: What difference can a well written brief make to the success of a research study? What happens when a poor brief is provided?

EB: *I was recently sent a great brief. It clearly outlined hypotheses as to why the problem was happening and who might best challenge their thinking from a consumer perspective. Best of all it had a great budget. The client knew the problem had breadth as well as depth and no one method could solve this alone. The brief outlined the expectation for ongoing workshops (budgeted for) and asked us to produce compelling stimulus (also budgeted for). Not a fairy tale, but a true story.*

Researchers need clarity for optimal design and delivery. Well-designed briefs provide inspiration and engagement, with clear control mechanisms outlining what is in and out of scope. The researcher needs to dive in and start tacking the problem as soon as they get the brief. So there should be enough information to write an outline of the proposal, for discussion at the very least.

Poorly written briefs on the other hand are like opening an Ikea box. All the instructions are in Swedish and you have just that darned allen key. Poor briefs have unclear objectives, little or no context, no action standards and unreasonable timings and budgets. Unfortunately I see many of these.

Make sure, if you are new to research buying, that you run the brief past an experienced internal team member. Or alternatively liaise with the research agency who can shape the research brief from to help provide clarity.

Good briefs result in great research outcomes.

Q. How do you review the different part of the briefs and what do you look for?

EB: *In its essence, the agency uses the brief to conduct a situation analysis on the best approach for the problem at hand and to begin the critical thinking process. Is the problem a simple problem to solve or a deeply layered problem, and what is the hierarchy of those questions? Will they have the luxury of a good budget and timeframe to explore all the issues and deliver a seminal piece of research? Or do they have to act fast, work efficiently and provide smart, focused solutions within a tight budget.*

Once I receive a brief. I immediately flick to the last page. Budget is a key tool for evaluation of research design to provide the best value the client can afford. I cannot stress how important it is to provide a budget in the brief. Timing is also critical. Both of these parts of the brief will generate questions of rationale, importance of the research to the solution and overall impact, and whether or not the agency can deliver.

The next section I look at is the business problem and what the client seeks to understand. Laundry lists of questions need to be boiled down into critical, important and nice to have.

Then I review if the client has a method and sample in mind. Can these be challenged and what considerations arise?

Finally, I call the client to set up a date for a face-to-face briefing, so I can get 'the real brief', as we say in agency land.

Q: What is the best process to use when briefing the agency?

EB: *This is dependent on the brief. A short, well-written brief means the agency can write a proposal. More complex problems demand more time spent upfront, ensuring the agency has all it needs to be successful in delivering the outcomes.*

My preference is to be emailed a brief with a quick telephone conversation and then a follow-up meeting to clarify and agree scope, deliverables and critical issues (internally and externally).

I have sat in long conversations, with inexperienced research buyers, where they read every word of a 30 page brief. Excruciating. Equally bad are briefing sessions with too many cooks who don't agree on the outcomes, when the goalposts constantly change.

A good briefing session should have the key research buyer and potentially one key stakeholder who can represent their position (this is absolutely crucial). I love it when the brand owner shows me some slides on strategy, where things are heading, where they have been and what they want from the research. Background information is very important, as the agency can provide recommendations on strategy and tactics once they understand the context.

We are marketing research consultants. You must think of us less as researchers and more as strategy consultants who can give an evidence-based point of view.

PART 1: Context & Objectives

1a. Overall business aim

Succinct description (ideally one sentence) of the strategic aim of the business which prompted the need for research.

Ellen Baron: *It is important to emphasise this is the organisation's aim, not what they want from the research; ultimately it's how the research will be used and judged.*
Will the research help provide a consumer angle on growth, managing decline, moving into new markets?
This element also provides motivation toward particular methodologies later in the brief assessment.

1b. Business context

Summary of all the issues, facts, challenges, insights and hypotheses driving the need for research, including:

- historic and recent market performance,
- competitive context,
- existing research available,
- internal points of view to be proved or disproved, and
- strategic or tactical decisions leading to the issue at hand.

Ellen Baron: *Provide us with some market share information, what is changing, who is winning and losing, and how are consumers or shoppers behaving.*
However, don't over do it. Keep this to a page and put big decks of tables, charts or additional research in an appendix.

1c. Decisions and actions research will inform

Decisions the business will make and actions they will take based on the research, in the short, medium and longer term.

Ellen Baron: *Begin with the end. How will this research be used? It is one of the key questions I ask at a briefing session. It is also an important sense check to ensure objectives are aligned with business needs, and it helps ensure the methodology is appropriate and covers all decisions. The recommendations and strawman strategies emerging from the research should talk directly to these actions.*

1d. Marketing objectives

The aims from a marketing perspective of what the business or brand hopes to achieve. Typical objectives might include growth in key market metrics, like penetration, frequency of consumption or spend. They may focus instead on brand metrics, like awareness, consideration, purchase or advocacy. If the research relates to launch of NPD, a communications campaign or a pack change, state the desired aim of the initiative itself. Ideally marketing objectives are quantifiable in some way.

Ellen Baron: *This section provides guidance on the scope of the research design, need for innovation in approach (especially if about entering new markets for instance) and audience to capture.*
Include here your thoughts on any marketing challenges regarding your product or service and the audience. For instance: penetration issues, key purchases influences, brand or product usage or attitude shifts.
Explain why the business is going after a target. Has there been a shift in strategy, such as the need to capture the growing 50+ target, a focus on male shoppers or the realisation a different audience controls the buying decision.

1e. Research objectives

The specific requirements of the research (aim for three to five), which will help shape the methodology.

Issues requiring deep and exploratory insight normally have objectives which start with ‘understand’, ‘develop’ and ‘examine’. In contrast, ‘measure’, ‘evaluate’ or ‘track’ suggest more tightly defined questions that likely require quantification.

Ellen Baron: *The important thing is that the research objectives do not attempt to be the questionnaire or topic guide. Too many questions means loss of focus and potential ordinariness of the outcomes.*
Write these as one word sentences with a single minded focus. For instance:

- *“understand shopper behaviour in the health food aisle”*
- *“evaluate client-centred training outcomes with key stakeholders”*
- *“create a hierarchy of decision making for a packaging brief”*

And don’t forget to use the research agency to bounce ideas and help sense-check your internal thinking about what is achievable.

1f. Research questions

Actual questions you require the research to answer.

Naturally the agency will finesse these considerably before putting them to consumers. Think about whether your questions relate to why, how, what, who, when, where, who with or how much? Also don't forget the opposites, such as why not?

Ellen Baron: *All good research starts with a question or tight set of questions to answer. This is about what you want to find out. It might be what you know you don't know. Or even what you don't know you don't know.*
Ask yourself what do you absolutely need to know 'vs' would like to know?
What questions have already been covered by another piece of research?
You should also include hypotheses here. You should have these, even if you are conducting exploratory or blue sky research. A well worked-up hypothesis is half the answer to the research question. Research will help you to understand why your hypotheses were either correct or flawed, and what directions you must now take to make changes.

1g. Key deliverables

The actual things you want the agency to provide you with at the end of the study. This might be as literal as key slides you want to see in a presentation, the data outputs needed to make a business decision or the answer to a specific question. Typical marketing examples include:

- detailed portrait of the attitude and behaviours of a particular audience,
- optimised product concept, with flavour recommendations,
- recommended price for a particular product in a given channel, and
- key inputs (specify which) to a creative or media brief.

Ellen Baron: *I love this section. What will make this project successful should be a key paragraph included here, alongside what you will do with the research.*
Also consider how the research will be disseminated and to what audiences. Will you need visual data? Retailer or trade stories? Raw data in a specific format?
Visual data and the use of infographics and video clips is on the increase. Do you want something more polished or raw or do you need a tight management summary to present to the board?
Agencies can provide all kinds of outputs. Some will need additional funds to create a valuable tool, so don't expect your agency to provide caviar outputs on burger budgets!

PART 2: Research Audience & Approach

2a. Sample Specifications

Comprehensive definition of who the research should speak to, based on who can help resolve the issue identified above (not necessarily the target consumer).
Might include demographics, behaviour (at a category, brand, banner, product or flavour level), attitudes and beliefs and media habits.
Provide incidence data if available (the percentage of your target that exist in the general population). If you require coverage of two or more sub-groups, state this and be clear on the prioritisation. Remember the more splits, the larger the required sample (and potentially cost).

Ellen Baron: *We have covered this briefly at marketing objectives, but it is always good to outline your actual research target. However, sometimes the agency will challenge this against the objectives to open up thinking, as they are closer to consumer trends and changes across the market.*
Questions you should ask yourself, and the agency will definitely ask of the brief, include:

- *Is the consumer and buyer the same person?*
- *Are female main grocery buyers really the only audience?*
- *What about extreme consumers, what could they bring to the table?*
- *Should we include a greater proportion of growing demographics, such as 50-65 year olds?*

2b. Geographic coverage

Key locations important to cover in the research, for example:

- international markets,
- all Australia (nationally representative by region),
- five major capital cities,
- regional, inland or coastal towns,
- eastern seaboard only or southern states only, and
- inner-city suburbs.

Ellen Baron: *Remember, you can't talk to everyone in qualitative research. Representativeness is less important than who can provide the 'why' answer best. With qualitative research ask yourself how geographic coverage will alter perspectives. Do you have quantitative or omnibus research that provides geographic evidence for inclusion or exclusion?*
With quantitative sampling, you should consider alternatives to national representative samples. For example, will an 'eastern seaboard' sample be enough? Should you boost regional samples? Is there a state divide (for instance with sport, football codes differ north and south)? Are their different historic biases to different brands (such as in banking and telecommunications) by area?

2c. Method Considerations

Important factors or initial thoughts which could influence the methodology, for example:

- Does the method need to be comparable to a previous or global study?
- Do you need video output for internal use?
- Is it important stakeholders can watch the research in progress?
- Can the research be conducted wholly online?
- Will traditional methods allow millennial targets to be reached?

Ultimately, the research method is best recommended by the agency and it is best not to be too prescriptive or narrow in your thinking.

Ellen Baron: *This is where a good agency can shine and why it is best for clients not to be too locked on one way of conducting the research. Clients are responsible for outlining any specifics that are absolutely required or 'no go' areas. But then let the agency explore possibilities and challenge conventional thinking. Recently I pushed for the inclusion of extreme consumers in a project. They were the 'off spec' types who are usually screened out. The key consideration was how to understand in detail the energy requirements of millennials. The best way to find that was not through mainstream audiences. We needed to talk to night shift workers, DJs, energy drink junkies, all outliers who magnify the needs. The results were far more enlightening than focusing on the mainstream alone. Not that the mainstreamers weren't important, as we also needed to see how those magnified behaviours manifest in everyday lives.*

PART 3: Project Details

3a. Stimulus Material

Any materials or information the business will provide to help facilitate the research which you'll provide them in, for example:

- product, packaging or advertising concepts,
- customer lists with contact details, or
- sample product (to use, taste, eat, consume).

It's important to be clear on the number, format and size, as it may determine the practicalities of the method.

Ellen Baron: *I can't tell you how many times I have worked on projects with poor or late stimulus. These are the tools for the agency to help enable consumer feedback, co-creation or debate. Not only should stimulus be supplied in a timely manner, it needs to be usable. I had the experience recently of A5-sized storyboards stuck onto a huge board. Lots of whitespace and nobody could read it!*

With regard to customer lists, ensure they are washed, up-to-date, and come with clear email and phone number details. By the way, it is not cheaper to recruit with lists; it is more expensive and time consuming.

3b. Timings

Required deadlines and when you can provide any necessary materials.
Typically if you can outline when the project will be commissioned any inputs provided, the agency will determine the subsequent milestones.

Ellen Baron: *Timings affect our suppliers, as well as any work an agency has at the moment or is planned for the future. Guaranteed timings can be on a first commissioned basis. So if you can provide solid timings and deadlines up front, agencies can book suppliers and venues ahead of time, ensuring smooth logistics.*

3c. Budget

The budget you have available for the project.

Ellen Baron: *It is a fallacy to think agencies will provide unnecessarily extensive designs just to fit a large budget. That said, a budget provides a fair indication of the scale of the project required and avoids the agency proposing something unrealistic.*

If you have $100k to spend, then you must expect quite an important and compelling piece of research. Or the agency may suggest you use part of that budget for another piece of work, to solve an ongoing tension that hasn't been addressed.

Alternatively, if you don't have a large budget, the agency will push themselves to be more creative and ask you to take some risks. We did this recently with a very small, but cost effective 'mobile chat' piece. Costs of supply and salaries are sky rocketing, so we have to be strategic in what we accept from a budget perspective. If you have only $10k to spend, it is in no one's interest to hide the budget.

3d. Proposal requirements

Any information you will need in the proposal in order to make your decision and to commission the study without delay.

Ellen Baron: *Any decision criteria used should be shared with the agency. You get a much better proposal when you tell people what you want rather than making them guess. That is old school thinking, today is all about collaboration for success.*

3e. Project manager and stakeholders

Be clear the one individual who will manage the research project from briefing to commission and then execution. This person will be first point of contact for any questions. Also list - with job titles - any internal or external stakeholders who have a vested interest in the research, as this will help determine the nature of the reporting.

Ellen Baron: *It is great to have a second contact if possible. People are often away, in workshops or on unexpected leave and the project management can suffer. I would also recommend outlining who the chief stakeholder is. This may mean an additional presentation to an executive team, the retailer or another third party. No need to go overboard, but this is a useful piece of information for presentation design. Ultimately, if the agency and client can combine to successfully deliver to the needs of the main stakeholder, everyone's a winner.*