

## The Art of the Research Brief

We find that the best research results occur when there is quality time spent planning the research. Completing the brief below will help you clarify objectives and prioritize what you need from the research. It helps us deliver the best approach, insights and value for your brand.

# The Art of the Research Brief

Karen King  
Vice President

## Project Name Research Brief

Many clients code-name their projects, especially if they are new product related.

### Background

Share an overview of the business situation and issues or challenges relevant to the project. What is driving your need for insight research? How did the project come about?

If there are related studies to share, be sure to include them. It will get us up to speed more quickly and avoid duplicating existing learning.

### Business/Marketing Objectives

Keep these big and broad. The key here is to share how the research will be used and the types of decisions that may be based on the findings in this study.

What is going to happen based on the research? Will you decide to launch a new product? Change your brand positioning? Expand to new geography?

### Research Objectives

Specific issues to explore and questions to answer. Make sure these are truly actionable. If we answer something, and there's no action to be taken, it falls in the "nice to know" category and is definitely secondary in nature. What do you need to learn or validate? What are the three or four most important questions you need to answer? And don't worry, we'll chime in on this as well.

### Target Market Definition

Sharing information here is critical to the project's success. Who do we need to talk to? Who are the audiences for your product/service? Who might have the answers we seek? Do you want to talk with current consumers? Lapsed consumers? Potential consumers?



# The Art of the Research Brief

Karen King  
Vice President

We look at demographic and usage or behavior frequency information, but also psychographic information. If you have segmentation studies or other research that “gets between the ears” of the consumer you are most interested in, that’s important to know upfront. We want to recruit the candidates that will give us the most helpful and useful information – this is particularly true in qualitative where we seek the “Why” behind feelings or perceptions rather than a national projectable sample.

Be sure to call out any specific groups that should be excluded during screening, and also indicate if you will be providing customer lists or if we will be recruiting the more traditional way.

## Geography

Is the study global in nature or limited to the U.S.? Are there specific locations where the research would be most fruitful – for example, high BDI or CDI markets?

## Methodology

Typically, our clients present us with business or marketing objectives and let us recommend the best methodology to achieve the most actionable and cost-effective results. But if you have a preferred methodology or would like to see several different options costed, it should definitely be shared in this brief. We will always review your input and then make any additional recommendations that we think would yield the best approach. Rationale for the proposed approach is an integral part of our proposal.

## Budget and Timing

Our clients often hesitate to state their budget range upfront, but we find that it saves a lot of time and avoids misunderstanding. There are always ways to find an answer to a research question – but the methodology must be tailored to the budget and timing as well as the insight need. Even if you just share an upper limit to the project budget, that can be very helpful in ensuring that the proposal is in scope.



# The Art of the Research Brief

Karen King  
Vice President

Timing constraints can also impact the proposed methodology. If the research needs to be conducted within a limited time frame, or there is a key date to be met, this information can have a significant impact on the type and scale of research we recommend.

## Deliverables

What do you need? Will a PowerPoint report suffice, or do you want an in-person presentation or workshop based on the findings? Do you need different presentations for different audiences (for example, high level executive vs. mid-management)? Often, my clients build in a day of “next steps ideation” to build on the momentum from the findings. Also, be sure to share upfront any expectations you might have for video clips, as the best results require a special and pre-planned approach to taping and sound.

## Contact information and Proposal Submission Requirements

Who is the primary contact at your company for additional information? When is the proposal due, and how should it be submitted? Is an in-person proposal presentation required?

