

Market Research and Insights Brief: Outline for Research Planning

Project Title:		Date of Brief:	
Client Contact:			

Decision Context

Provide only what is needed to understand the parameters of the project and to understand the business objective. You can do this by answering these two questions:

1. What is the situation you are faced with?
2. What is the complication that makes this project a necessity?

Some Topic Areas to Consider

- **Company Background.** Keep this brief and provide only for new consultants.
- **Strategic Direction.** This is reflected in the business objective and tells the consultant why the objective is important.
- **Market Environment:** Note any significant factor seen as contributing to your current situation. Just because it can't be controlled doesn't mean it should not be factored into the design.
- **What You Have Done.** What have you done to create the issue or try and resolve it? For evaluation research, this would need to give an overview of what it is that you need to be evaluated with the details provided in the appendix or other documents.
- **Knowledge Gap.** A statement outlining the broad need the business has identified and has led to this specific project.

***Example.** Eris Strategy is a medium-sized insights-based consultancy that focuses on delivering evidenced-based strategy for its Australian and overseas clients. As part of its broader business expansion objectives, that includes broadening its client portfolio in addition to the services it offers existing clients, we have identified a potential opportunity in the X industry for its unique approach to that links behavioural science with management thinking in delivering strategic advantage to its clients. While we have preliminary data on the market size and feedback from clients who have moved into this industry, we do not know if the industry provides a viable platform for long term growth or what unique aspects of the industry we need to address in our service offering.*

Business Objectives

The single (ideally) business objective the project needs to assist in delivering. This information shows how the project is assisting in delivering rather than expected to address solely.

Example. As part of the growth objective of Widget Corp to double our business size by 2025, our sales objective is to increase our customer base by n% by attracting y% of the new to category customers.

Insight Objectives

The objectives that the research needs to deliver to help the business achieve its business objective. Try to restrict your research objectives to fewer than five objectives. The longer your objective list, the more likely you have project scope creep or are just repeating objectives. Structure your objectives to show how they are linked to your decision making and use of the research. If there is no decision-making sequence in your objectives, then prioritise their order. Your insight objectives provide the focus for the research design: Make the list long and incoherent and your research will come over budget and be incoherent.

Be customer-centric in your objectives. Asking the consultant to check if you met your internal criteria and objectives is fine for purely evaluation oriented projects and measuring KPI. However, for research that is about understanding or changing customer behaviour, it can lead to reinforcing a bad strategy.

Example.

1. *Determine which of our proposed campaigns have the greatest likelihood of success in attracting new to category customers.*
2. *Understand what aspects of the proposed campaign both drive and detract from attracting our target market.*
3. *Deliver recommendations on which campaign direction to pursue and how to increase their likelihood of in-market success.*

Information Needs

These are the sub-needs that fit under each of the research objectives. This section allows for specific information requests that are needed and to indicate types of analysis outputs. While the Insight Objectives should be customer-centric your information needs can include operational oriented concerns, like checking if specific needs are being met. In communication research this could include whether or not your advert elicited a targeted emotion.

Information Needs may also be written as questions. Sometimes it is easier to write your information needs first, group them into similar themes which then become the research objectives. With an iterative process to weed out irrelevant and out of scope questions.

Example.

1. *Determine which of our proposed campaigns have the greatest likelihood of success in attracting new to category customers.*
 - *Are any of the campaigns likely to be effective?*
 - *What determines which is more effective?*
 - *What distinguishes the campaigns in our customers mind?*
 - *How well do they meet our communication effectiveness criteria of being distinctive, relevant and memorable?*

Sample Frame and Analysis Groups

How is your market defined and who are your target markets? Include incidence or population size data and what defines the relative importance of different market segments, if available. The market definition is a major cost driver that will also impact the generalisability of your insights, and usability of the results.

If you are providing contact lists, outline what details you will provide and your list quality. List quality includes any information that shows how likely a contact would respond, or is a contact. For example, contact list source, time since details were entered, time since targeted behaviour (i.e. opened account), bounce back rates, and proportion with complete details.

Example.

- *Our target market are people with home mortgages living in Australia and New Zealand. This market is mainly comprised of people aged 35 to 45 years, and are owner-occupiers. This segment represents x% of the total mortgage market.*

Deliverables

Specify any specific deliverables or reporting needs that you need from the project. These deliverables can be simply that a report and a debriefing session, or presentation, is needed. For tracking and multi-stage studies, the reporting can become a major cost, so be clear about what you need and why you need it.

Example.

As part of the brand tracking project, we require end-of-quarter presentations and biannual workshops with the brand team, in addition to end-of-month tracking reports. Our preferred format for reporting is PowerPoint, however, we are open to alternative reporting approaches that increase the accessibility and timeliness of insights to our broader business.

Timing

Provide any key dates that the project needs to deliver to, and key internal dates you need to deliver against. For example, campaign or product launch period, executive board meetings or global reporting periods. This can include lead times that you need for internal reports.

Budget

If you have no idea what a project is likely to cost, then ask for multiple budgets with different value add options, and details on key cost areas. Even if you do not give a budget, have one in mind a budget to help guide the scope of the project.

Pitch Process

Indicate if more than one agency is being requested to pitch, and whether there are specific requirements pitch process requirements.

Background Reports and Data

This section contains lists of internal and external reports being provided to the agency, or where to find the reports, and what reports they can access if they are selected.