

# Market Research and Insights Brief: Outline for Research Planning

<b>Project Title:</b>		<b>Date of Brief:</b>	
<b>Client Contact:</b>			

## Decision Context

Provide information that will help the agency understand . . .

1. What is your situation?
2. Why is the research needed?

### Some Topic Areas to Consider

- **Company Background.** What your organisation does, where it operates, and how you are different.
- **Strategic Direction.** This is reflected in the business objective and explains why it is important.
- **Market Environment:** Note any significant factors 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.

*Example.* Widget & Co. is a mid-sized consumer goods company that has recently experienced a decline in sales, despite stable awareness and distribution. Competitors have recently launched new ranges that we believe are attracting new consumers to the category and switching out customers. We currently estimate 34% category penetration and we have 23% volume share.

## Business Objectives

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

*Example.* Widget & Co. is developing a strategy to return the business to sustainable growth and needs to understand whether to invest in new products, adjust pricing or reposition the brand.

**Insights Objectives**

The objectives that the research needs to deliver to help the business achieve its business objectives. For each objective, you may also want to provide any specific information you need in making decisions or support reporting.

*Example. The research needs to identify what is driving the sales decline, how customers perceive the brand relative to competitors, and which strategy is most likely to return the brand to growth.*

**Target Market | Sample Frame**

How is your market defined, and who do you need the study to include? The research agency may suggest alternative definitions based on your Business Objectives and Insight Objectives, to improve outcomes or support the practical operation of the research.

*Example. Recent category buyers are aged 25–64 and tend to be more female. We would like the research to include both current customers and competitor customers, so that any change does not alienate our current buyer base.*

**Deliverables and Timings**

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 a presentation, is needed. For tracking and multi-stage studies, reporting can become a major cost, so be clear about what you need and why.

*Example. A presentation and executive summary are required by mid-March to inform the next quarterly planning cycle. We have a wide range of internal stakeholders and would like the agency to provide options for engaging these groups and better embedding the results in decision-making.*

**Budget**

Provide guidance on the budget or expectations. If you are unsure and do not want to commit to a cost, discuss options with the agency about what you need and the trade-offs

*Example. We do not have a fixed budget, but would consider options up to \$X. We would also consider other options that have clear trade-offs and benefits.*

**Pitch Process**

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

*Example. This is a competitive pitch. Proposals are due by X date, with agency selection expected by Y date.*

**Background Information**

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.

*Example. We will provide previous brand tracking results, sales data, customer feedback and competitor information to the selected agency*