

Painless Insight Planning



Susan Abbott's no-nonsense, step by step guide that will help you set objectives, set a budget, get clarity, and get value from **qualitative research**.*

*Fast. Painless. Even if you've never done this before. Your suppliers will love you, and so will your boss.

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This book is available for **free** by download at my blog, www.customercrossroads.com. While you're there, I'd consider it a favor if you subscribed to my [Insights newsletter](#) which is sent out by [Abbott Research + Consulting](#) about six times a year. Or add my RSS feed to your reader: <http://feeds.feedburner.com/CustomerExperienceCrossroads>.

Thank you for reading, and I hope this helps you. Please share it with anyone who would benefit. And *good luck with your project!* I'd love to hear your feedback. Just add a comment on the download page, or send me an e-mail.

A handwritten signature in black ink that reads "Susan". The signature is written in a cursive, flowing style.

What's Inside

I've been working with clients big and small for a long time.

And I've learned a lot about how to get qualitative research that really rocks. Jaw-dropping insights that help people move ahead, rethink, create, and solve problems. In short, what we might call **actionable insight**.

I want all my work to have actionable insights. And the only way you get there is to have clear objectives at the start.

Some of my clients are very sophisticated marketers and are also pretty sophisticated in how they buy marketing research. They have multi-page research briefings that they send out to suppliers like me. Perhaps you are trying to draft a document like that, and you need a place to start. **This book will help you.**

Perhaps you just have a problem facing your company that is not well defined. You think some research might help. **This book will help you, too.**

If we don't have clear objectives, there's no way we're getting actionable insights, and my client – or you – is going to spend a bunch of money getting something that won't help. They will not feel excited about the work at the end of the project. They might think they wasted money. This is not my idea of how to build loyal clients.

So I don't let that happen, and neither should you.

Instead, I developed some tools so I can sit down with people and work through what they are really trying to do. I've made the tools as painless as possible. Fun even. Because I like it that way, and because it gets better results.

I'd love to be able to sit down with [you](#) so we could talk about your objectives. I'd ask you a bunch of questions to help you get your ideas straight. Then I'd offer a few thoughts of my own. We might go for coffee. In short order, we'd be done. Then I would have a basis for developing a research plan.

Since I can't do that, I'm going to give you the workbook I use. With a few things added, because I'm not in the room.

You might be able to use this tool to plan quantitative research – *the statistics and survey kind of research* – and feel free to use it that way. But it isn't really designed for that. It's designed to help you plan what I call *the squishy stuff* – qualitative research, insight research.

Along the way we'll do a quick check of whether you actually need qualitative insights (squishy stuff) or in fact would be better off with some kind of a survey.

This planning tool will not give you a research design.

But you will have clear objectives, you will have thought about what you could do with the insights when you get them, and you will have some ideas about direction and methodology.

How to Use This Painless Insight Planning Tool

I'm guessing that you're reading this knowing you need to get a plan together.

May I suggest you print off a few pages to have ready while you read this on your screen.

To reduce paper use, just print off these pages: 6, 8, 9, 10, 14, 17, and 18.

Then you will have the sheets you need to doodle on, write on, brainstorm on, and finally fill in. This e-book is formatted to easily fit your computer screen. When you print the pages, you will have lots of white space to work with.



My advice is to get some colored pens, highlighters, sticky notes and anything else that will make this feel like fun and help you release your creative juices. If using sticky notes helps you get past mental barriers, feel free to do that, too.

And grab a beverage of your choice. Now let's get started.

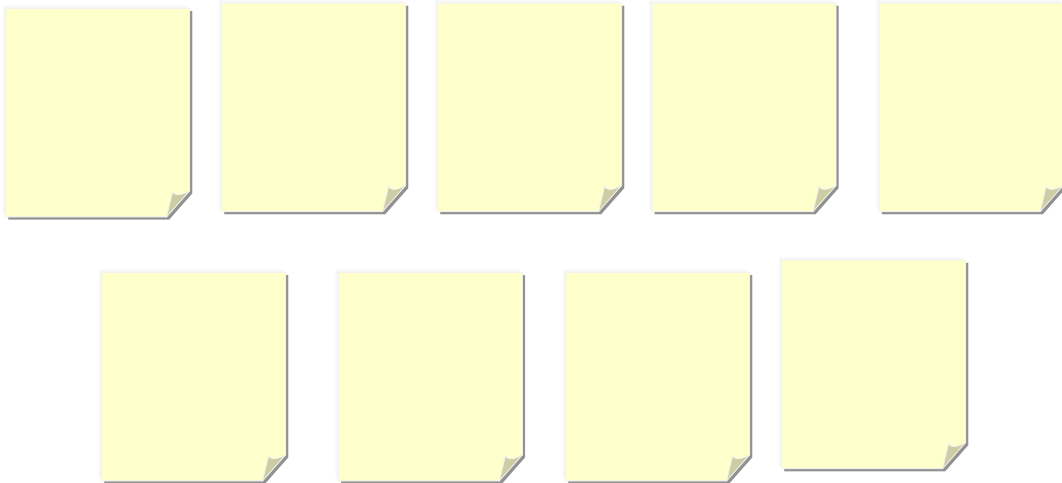
Why the shapes and colors?

Colors and doodles help people be creative and non-linear. This is a good thing in the beginning. It's all in support of painlessness.

WHAT GOT YOU THINKING

That you need insight research?

Jot down everything that comes to mind ... or scribble it on a bunch of sticky notes and stick them on this page.



STUCK?

See if any of this prompts an idea

Sales are down/Market share is down/A new competitor is eating our lunch

We just launched a product and it's flopping

We want to expand/launch into new markets

Staff are leaving/No one wants to work here/We need to attract the right kind of people

Customers are leaving/Customers aren't coming to us/We seem to be getting a lot of complaints

Public opinion is poor and it's affecting _____

We think we're good but we want to be better so that _____

We want to come up with new product ideas so that _____

We need to cut product costs, but we don't want to lose share/customers as a result

Something weird is happening, and we don't know why/and we think it might be an opportunity/problem

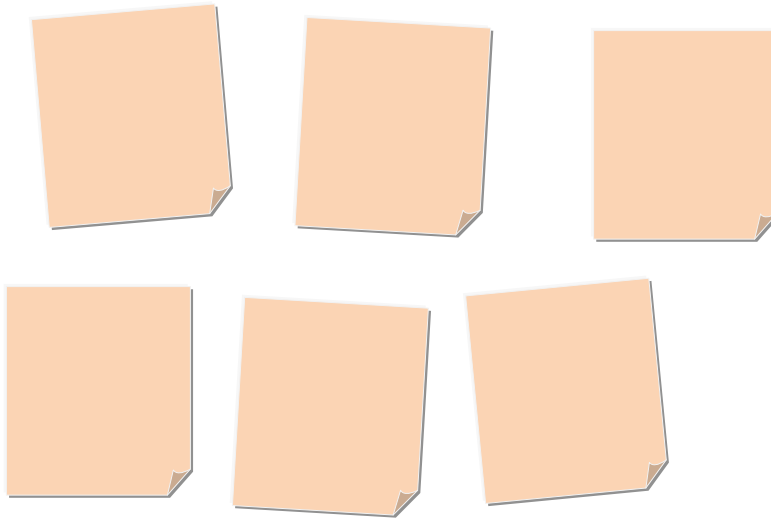


Go back to Page 6 and add anything that's missing

WHAT ELSE

Do you know about this problem, challenge or situation?

Do you have some guesses or hypotheses about what is going on? Do other people have pet theories, even if you think they are wrong-headed thinking? Write that stuff down here.



Who to ask?

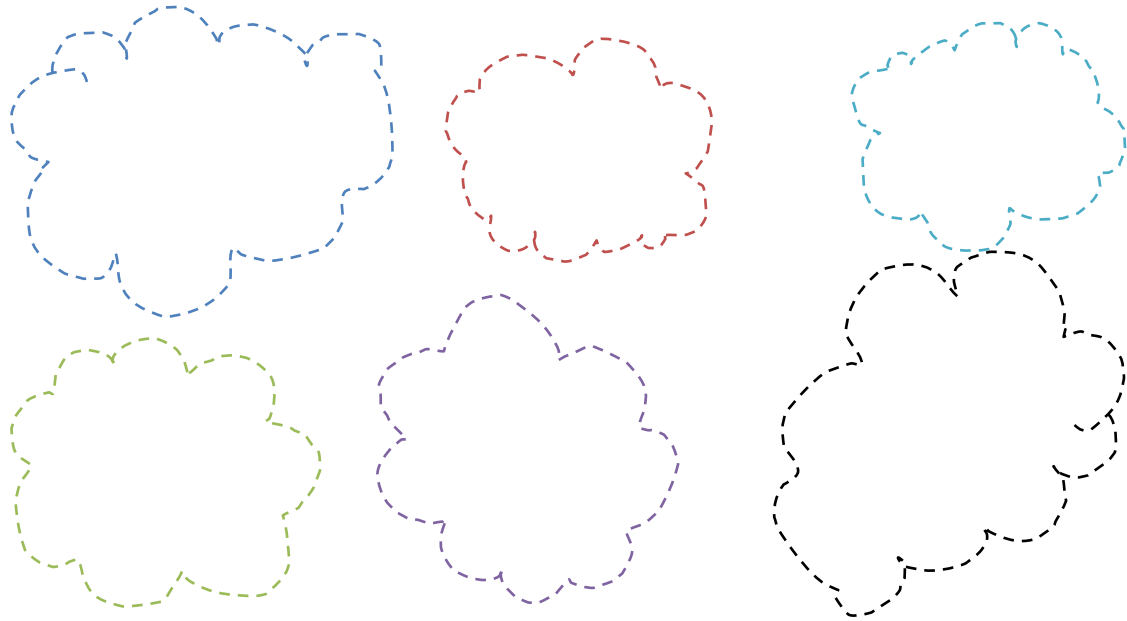
You might need to ask the business leader about some of this.



BRAINSTORM EVERY QUESTION

What is **every single thing** you would like to know about this situation?

Write it all down. You'll probably need another page.




HOW MIGHT YOU ACT


On this information if you had the answers?

Realistically, what actions or decisions are possible or available to you if you had answers to all your questions? Would you change your communications? Reposition the brand? Close down a division? Drop a product? Redesign packaging? Launch a new product? Create a training program?

We could...



If you can't act on the information, then it's a nice-to-know, not a need-to-know. Nice-to-know is best for blue-sky type projects where you want to create something completely new. Not so good for solving problems.



IF YOU HAD PERFECT INFORMATION

What is it worth?

This is a tricky one, so let me explain.

Let's say you are Kraft or Coca-Cola or Bank of America and you are about to launch a new product into the market. The cost of launching a failure could be many millions of dollars. The rewards of a success are also many millions of dollars. So it's worth some money to get it right.

Or let's say you have a product in the market not doing so well. You want research to turn that situation around. If the revenue line is \$1 million, how much bigger could it conceivably be as a result of this new insight? And what's the profit on that increase?

You see what I'm getting at here?

You'd be shocked how many people don't give this a lot of thought. Even really smart business people. But you need to know how much profit there will be from the new insight. You need to have some idea of what it is worth to answer your questions.

- ✓ Are the answers going to help you save money somehow? For example: employee research is often conducted to reduce employee turnover, or to ensure employees can be happy and work effectively.
- ✓ Could you spend the money you are already spending more wisely? Or could you be getting better results from the money you are spending? This is often a reason to conduct research on advertising or other communications.

- ✓ Are the answers going to help you find new customers, or build new sources of revenue?
- ✓ Are you trying to decide whether to launch a new product feature that will cost money, but might make your product more appealing?
- ✓ Are the answers going to help you reverse a decline in revenue?
- ✓ Are you seeking insight at the fuzzy front end of innovation – insights that will help your organization think up some new ideas for the future?

After you do the research, you are not likely done spending money. You might need your advertising agency to do some work for you. You might need to buy media. You might need to create a training program. At some level, you will have more work to do, and this work will likely involve spending some money.

This is why I created the 10 times value rule.

Let me explain.

THE 10 TIMES VALUE RULE

Let's say you have a \$1 million revenue line. And you think there's potential for another \$300,000 of sales if you have better messaging.

Divide that number by 10.

You would not want to spend more than about \$30,000 solving that problem, would you? Maybe a little more, maybe a little less, [depending on how much additional expense you have after the research is done](#). You would also want to consider how long the changes are likely to have an impact. In slow-moving markets, perhaps you are good to go for a few years. In fast-moving markets, you might need to reassess annually.

Let's try another one.

Let's say you are a major pharmaceutical manufacturer. Maybe you make a proprietary drug with sales of \$500 million annually in the United States alone. And you think you can move your share of market from 50 per cent to 52 per cent with the right messaging. Well, that would be worth \$20 million in revenue. So you can afford to do pretty amazing research to get to that solution.

Perhaps you have a different kind of challenge.

Maybe you have an employee turnover problem. What is it costing you today? How much could you reduce that cost?

The 10 times value rule is just to get some kind of sense of scale.

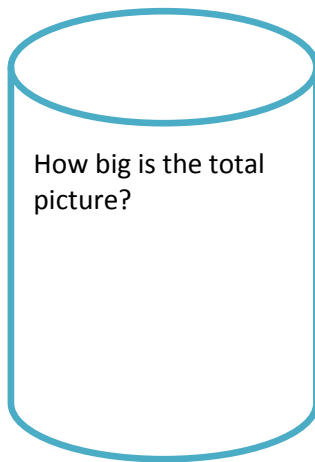
WHAT'S IT WORTH

To find the answers?

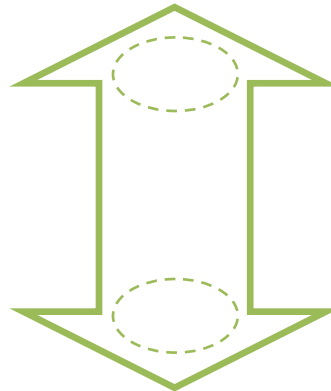
So, let's take a stab at the question again.

If you had really great information, and you could act on it effectively, what's it worth to you? Would you save money? Avoid making an expensive mistake?

Try to put a number or a range on this amount.

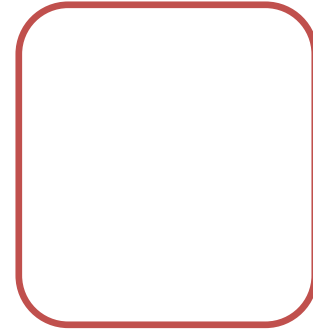


What's the upside worth?



What's the downside savings or risk of mistake?

Divide by 10. Tweak a little.
Put a range of values here ↻



WHO KNOWS

Who has the answers, if we ask the right questions?


OK. No more numbers! Now we want to brainstorm about who can give us insight into our questions.

- ✓ Maybe it is high-value customers or loyal customers. They know what they love about us.
- ✓ Maybe it is former users. They know why they left and what they are doing now.
- ✓ Maybe it is people who use the competitor product.
- ✓ Maybe it is the tax advisors that make recommendations to our customers, or the IT specialists who decide purchasing specifications, but don't make the final purchase decision.
- ✓ Consider users who don't make buying decisions. For example: ticket agents at the airport use the ticketing terminal, but they are unlikely to be the buyer of the terminal.
- ✓ Consider buyers who don't use. For example: mothers buy products for their families that they may not use themselves, such as sweet cereals and shaving cream.
- ✓ It could be people at different points of a process. For example: thinking about buying a house, actively looking for a house, or just moved into a new house.
- ✓ Perhaps you already have market segments based on attitudes or behavior. Such as, people who use electronic stock trading systems; people who go into bank branches to make deposits; people who value status brands; people who never pay full retail.


Think hard about who knows about this challenge, either because they are an expert, (field sales, technical support team), or because they are in a consumer segment. Are they mostly in one place? Are they all over the country or all over the world? Do we know them by name, because they are on a customer/former customer/prospect list?

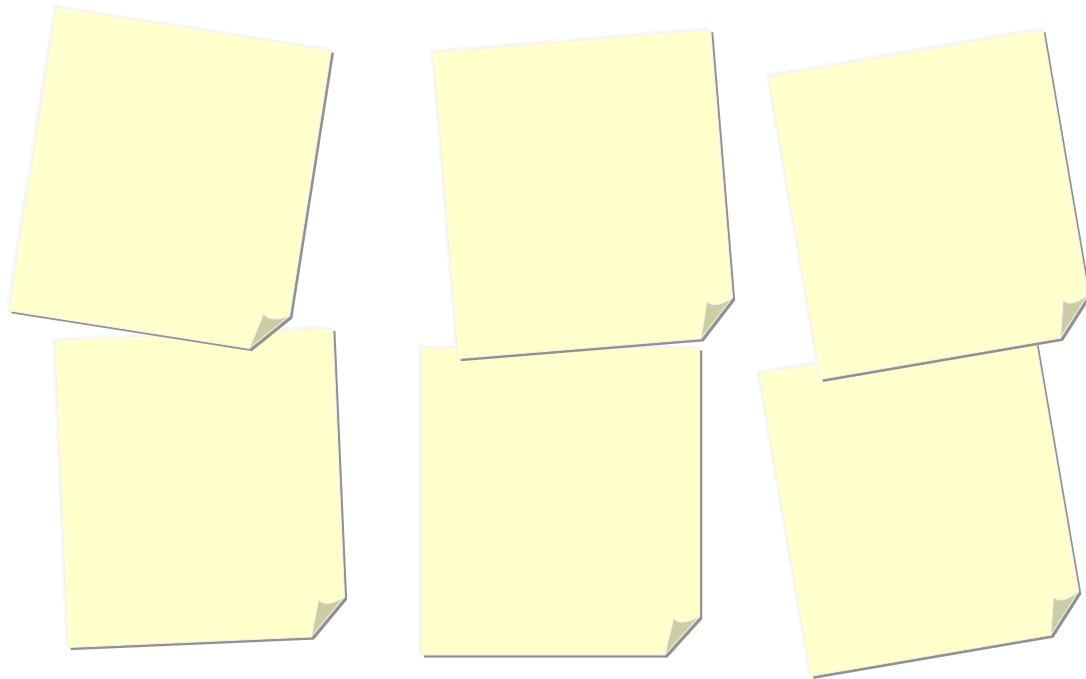
This information is usually really critical in getting good research. The research target also has a big impact on the cost of the research. So it is important to think a bit about this before you even talk to the researcher. And then to get them to think about it as well, and help you refine it.

You can get started on the next worksheet, on page 17.

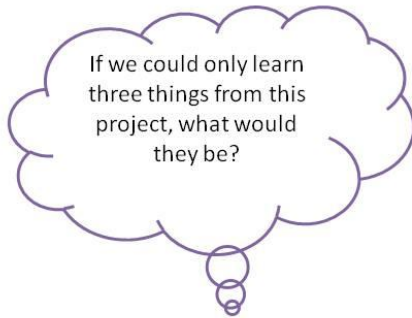


I once ran a *demonstration* project where the research participants were not a good sample, when the topic was cell-phones. The findings came out weird. Since it was a pro-bono project and I owned the data, I wrote it up on the Customer Crossroads Blog: Listening Right and Listening Wrong. Click [here](#).





REVISIT THE PRIORITIES



1

2

3

Pulling It All Together

This is where all your good brainstorming work is going to pay off.

Now that you have thought things through and made lots of good notes, you will find it a lot easier to see what is missing, and what your real priorities are. Here's where your highlighters are going to come in handy.

You have what you need to create a research brief.

As you develop the brief – starting on the next page – use your highlighters and marking pens to identify priorities, add anything missing, cross out things that seem less important, and help you organize your thoughts.



THE RESEARCH BRIEF


Background

Look at your notes from Page 6. This is the background situation. Add in the hypotheses about what is going on from Page 8. Depending on your situation, you might need only a paragraph, or you might need several, to give another person the relevant information.

Business objectives

Business objectives are often the reverse of the problem. If sales are down, you want to increase sales. If turnover is high, you want turnover to go down. Business objectives are not what you are going to learn, they are the result of successful learning and implementation.


These should be one or two bullet points. If it is more than this, you probably have marketing objectives up here.



You've done some hard thinking. So as a **BONUS**, I have created a nice little template for you in Word that you can use to create the RESEARCH BRIEF, using the headings that are here.

Click to download a [ZIP](#) file or get [Word document unzipped](#).

Alternative download sites: [ZIP file format here](#) and [here for unzipped Word 97-2003 file](#).



Marketing objectives

Your notes from Page 10 will help you figure out the marketing objectives.

The marketing objectives (or perhaps operational objectives, for an internal project) are the goals for the project, but not the business outcomes. It might be a package design, new advertising, a successful product launch. It is going to be something **actionable**. So use action words.

These are the things that are going to happen **after** you get the research. And they are going to lead to the business objectives.

Research objectives

Your notes from Page 9 are a starting point here. And your notes from Page 18 will help you refine this list. You might want to start by highlighting the most important stuff from Page 9.

It's OK to have a huge list of things you would like to know. But you have to set priorities. What is going to get you to those marketing objectives? Those are your priorities. Everything else is a nice-to-have.

Remember that this is a starting point. Your researcher will help you refine what is possible, and may think of some things you haven't thought of. This is OK. The brief is a starting point.

Research target

Create a bullet list of the target groups. There are usually a few, so you can compare and contrast views. Use your notes from Page 17 to do this.

These are the people who can get you to the research objectives. If they can't, you need to rethink the target.

You don't need to specify how many people you want to study, although you can. It's a good idea to note as much information about demographics as you have. For example, if the primary users of your product are men over the age of 55 living in rural areas, you want to say this.

Budget

Page 14 has the budget range for the project.

Sometimes clients don't give the supplier a range for the budget. This usually means your researcher spends time creating multiple options for the budget he or she *imagines* you might have. And they might miss the mark completely, because they don't know how big or small this problem is.

It is very frustrating to be asked to build a sophisticated research plan and then learn that only a very small budget is available.

You might think that supplier frustration is not your problem. But reputation does matter. And it ultimately affects the willingness of good people to work for you and your organization. Great clients get great work.

A better approach is to ask them what options they can suggest **within** a range you provide.

Timing

You may be planning this project for some months in the future. For example, if you want to research ice cream you might want to wait for warm weather when more people are thinking about ice cream.

On the other hand, if you are doing creative testing of your Super Bowl advertising, there is not a lot of flexibility in your schedule.

It's also helpful to note what date you would like a response, and when you will make a decision.

Congratulations! You are done!

DO YOU NEED A method section?

Some people think you should put in a section identifying the research method you want to use. You can add this if you wish, but I recommend asking for recommendations and options based on your objectives.

There are many options available to you in qualitative research projects. I have summarized the main ones on my web site, here:

<http://www.abbottresearch.com/qualitativeResearch.htm>

If you have thoughts about what you want and why, by all means say so.

For example: you may know that a purchase is influenced by the opinions of others. This might lead you to want a format that allows for group discussion and influence. Your target group might be scattered across a wide geography. This might lead you to consider an online approach.

But leave the door open for suggestions for improvements or alternatives, or you are unlikely to hear about potentially better ideas.

DO YOU NEED

Qualitative (squishy) or Quantitative (statistical)?

Once you have put together your objectives, you can review whether you really do need qualitative research – what I am calling *insight research*. Or whether you actually need a survey or some similar type of quantitative research.

Where Qualitative Excels	Where Quantitative Excels
Generate new hypotheses and insights Gather insights into behavior Rich details and context What the belief systems are related to behavior How people use your product/service The language and metaphors that relate to your product or brand The why behind the what	How many people share a given view or attitude What attitudes are most likely to be expressed by a given group i.e. correlations Cluster groups based on their responses to questions i.e. segmentation Find out the size of a market Numbers, percentages, statistics Projectable to a larger market

Note that both the approaches shown are scientific. Observation is the oldest scientific method known, and has served humanity and science very well.

But a scientific survey using good statistical sampling methods is projectable to a larger population. Qualitative is not projectable in that sense – the 19 times out of 20 kind of sense.

A third approach, not discussed here, is causative research. For that you need an experimental approach. It's not impossible to do in marketing research, but it is less common. Neither of the methods above will actually prove causation. They may point to it, but that's not the same thing.

Now What?

Now you are in a position to have a really great conversation with a handful of selected suppliers. Two or three is all you need. Or just one that is your trusted research partner.

You give them your brief and you ask them to give you some good ideas about how best to address the challenges. Seek options and alternatives. Then ask why these methods are being recommended as the best approach for your needs.

You might be pleasantly surprised by the ideas that come back to you.

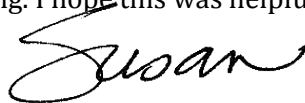
You can find good marketing researchers all over the place, but I do recommend checking out the directories for marketing research professionals in your country. In particular, I am a fan of the Qualitative Research Consultants Association, the worldwide association of qualitative professionals that specialize in *squishy insights*. www.qrca.org

And if you want to find me, that's also easy.

Susan Abbott

susan@abbottresearch.com

Thanks for reading. I hope this was helpful to you. Please send me your suggestions for improvement.

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