Better Consumer and Shopper Research Through Effective Briefing

A PRACTICAL GUIDE

AXIS MANAGEMENT CONSULTING

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Why Effective Briefing Matters

Getting consumer and shopper research right has never been more important for food businesses supplying the UK's multiple retailers.

Profitable NPD, effective category management, and successful brand development all depend on smart use of research, and the retailers expect to see strong research evidence to support business recommendations. As succeeding in this sector gets ever tougher, food businesses can ill afford the consequences of poorly conducted research. The risks and costs are just too great.

Research spending has been squeezed in many businesses, both as a result of overall marketing budget reductions and of increased requirements for buying retailer-specific continuous data (e.g. Dunnhumby and Nectar Card data). This leaves less money available to pay for consumer and shopper research projects. It is vital that this smaller pot of money is spent well.

There is, of course, a major upside to the effective management of research: more learning per £ spent, and a whole lot of better business decisions. The positive consequences can be enormous.

A GOOD BRIEFING PROCESS IS ESSENTIAL AND IS ONE OF THE MOST CRITICAL ELEMENTS TO ACHIEVING EFFECTIVE RESEARCH: IF A PROJECT DOESN'T START WELL, IT IS UNLIKELY TO END WELL!

Problems With Research

There are many ways in which consumer research can go wrong. Among the more common are:

- The objectives are not clearly spelt out by the client or understood by the research agency
- The research attempts to cover too many things, in an un-prioritised way, and does none of them in adequate depth
- The right respondents are not recruited
- The required timing is not achieved
- The research provides just information, rather than the real insight and actionable findings which lead to profitable outcomes
- It tells the client little that they didn't already know, and leaves key issues unresolved
- It doesn't give the client sufficient confidence to base decisions on it
- There is a lack of buy-in by stakeholders within the client organisation

These, and many other problems, can often be traced to the briefing process. Standards and methods of briefing vary enormously. At one end, vague, purely verbal briefings or lengthy documents in which all clarity is lost. At the other end, focused processes using concise, clear documents and effective briefing meetings.

A GOOD BRIEFING PROCESS IS THE BEST DEFENCE AGAINST THE RISK OF A FAILED PROJECT, AND THE BEST ROUTE TO RESEARCH SUCCESS.

More Than Just A Document – Process Overview

A good briefing document is critical, but how it's used as part of an effective briefing process can make a real difference.

The key phases of the research process related to the brief are:

- Creating the briefing document
- Conducting the briefing meeting
- Keeping on brief during the project
- Reviewing results versus the brief after the project

Sometimes, the initial stages of the briefing process may involve more than one agency due to a requirement to conduct a competitive pitch. In this case, a small number of agencies briefed well is far superior to a larger number briefed in a superficial or low-involvement way. The level of engagement and quality of thinking from an agency is going to be much better if the people there know they are being seriously considered as one of a select few. The chances of the agency coming up with the right solution are also much enhanced if there is a good client/agency dialogue about the brief. This is something that is unlikely to happen if the brief is sent to numerous agencies in a trawl for ideas, and little or no discussion takes place.

Where there is a competitive pitch, it is useful to indicate what will be the main criteria used to choose between proposals. For example, "originality of approach" or "lowest possible cost".

The Briefing Document

OVERVIEW

The briefing document is the essential focal point of the briefing process.

The process of writing it is useful if it brings about a sharper focus on what the research is for. Careful thinking and discussion about the aims of the research, and how it will be used, should be done before anything is written. Once the thinking is clear, the writing should be quick and easy. Effective discussion with the various stakeholders will also serve to ensure a greater degree of buy-in.

When writing a research brief, the "less is more" principle applies strongly. For a fairly straightforward project, an excellent brief may well be less than 2 pages in length, due to being very focused on essentials and concisely written. Long descriptions of the client's history or long lists of detailed questions only detract from clarity and focus.

CONTENTS OF THE BRIEFING DOCUMENT

Background

Be selective. Apart from a brief setting of the scene (including key points on the market and brands), cover only those points which could/should affect how the research is conducted. Briefly outline why the need for research has arisen, what is at stake, and what will happen as a result of the research.

It is useful to highlight the existence of any relevant research that has already been conducted. This will help to avoid duplication and ensure that the new research builds on what has already been done. The pre-existing research can then be provided to the agency as part of the briefing process.

Objectives

This is the most critical section. Without clarity of objectives, the project is at great risk of going astray.

It is worth taking more time to get this short section right than all the rest of the document put together. Go over it. Question it. Poke at it. Challenge other team members. Ask "have we really got this as sharp and focused as possible?"

Be sure, also, that all the relevant stakeholders have bought in to the objectives.

The objectives section should clearly distinguish between 2 types of objectives, covering each separately:

1. **Business objectives:** **the business purposes which the research is aimed at helping. For example, "Strengthen our category dialogue with Asda" or "Enable us to decide which development route to pursue for brand X".**
2. **Learning objectives:** **the things the research must find out in order to help achieve the business objectives. For example "Establish shoppers' views of the positives, negatives, and unmet shopper needs of Tesco's offering in category Y" or "Identify which design routes for brand Z are preferred by consumers, and how they should be further developed to optimize appeal".**

The number of objectives in each of these sections should be small (3 or 4 at most). It is important to realise that less is more. There is a real trade-off here: if you load up a piece of research with too many objectives, you risk not getting sufficient depth of insight into any of them. If something is merely "nice-to-know", it should be excluded.

The detail of questions to be explored should be dealt with later in the process, during the development of the questionnaire or discussion guide.

You may have a view on the type of methodology required to meet the objectives. If so, indicate this in this section but make it clear that you would welcome other suggestions from the agency. A tightly-defined set of objectives will then give the agency the best chance of giving you a useful recommendation.

Action Standards

If there are pre-defined action standards against which new products or other ideas going into the research will be judged, these should be spelt out here. For example, "If the appeal of new product X exceeds that of current product A, we will launch it".

Target Audience

This section should describe both WHO you want to research and WHY you want to research them. For example, "women aged 25-40, with young children, because they are the current core consumers of the brand", or "single men aged 25-50, because they currently under-index on consumption in this sector and we need to understand why".

If there is a requirement to look at sub-groups within the overall target audience, this should be stated. For example, you might wish to include sub-samples of both Sainsbury's primary shoppers and Sainsbury's secondary shoppers within an overall audience of Sainsbury's shoppers.

Where known, the incidence of target consumers should be made clear. For example, "Users of brand A are required and 52-week household penetration of brand A is 2%". Particularly with quantitative research, the incidence of the target audience directly and substantially affects the cost of the research. In the case of very low incidence, it may not be possible to recruit respondents who fit the original criteria so an effective substitute may have to be devised. The agency should be able to help determine whether or not it will be feasible to recruit respondents from a given audience.

If there is uncertainty about how to define the target audience, this should be made clear. Again, the research agency should be able to help with the decision.

Give a brief summary of what data you already have about the target audience and refer to detailed information that can be provided.

Stimulus Material

This section should specify what materials will be available for use in the research. These may include new product kitchen samples, concept boards, packaging mock-ups, or competitor products. Getting the right quality and quantity of stimulus material can make a major difference to the quality of research findings. It is therefore worth some careful planning. Again, the research agency should be able to provide useful guidance on what works best.

Hypotheses

This section should briefly outline any ideas/views that you or colleagues (and retailers where relevant) have which the research may validate or disprove. If someone has pre-conceived views, or needs evidence to try to overcome an entrenched position, it's better to know it up front.

Timing

Transparency on the real deadlines and the reasons for them is best in order that the agency can respond accordingly. (e.g. "Topline findings needed by 21st June to enable further NPD work; full presentation by 26th June to allow time to prepare for presentation to Sainsburys on 29th June").

In some cases, shortage of time may restrict the choice of possible research approaches. In other cases, the agency may need to put extra personnel on the project in order to accelerate it to hit a tight deadline. It's better to know that up front!

Budget

There is always more than one possible way to tackle any given research challenge. Without some guidance on budget, the agency may design the equivalent of a Rolls Royce when what is required is an ordinary family saloon.

One possible approach is to ask for proposals at two different, specified, budget levels. The agency should be asked to make explicit the trade-off between cost saved (on the lower cost option) and what's lost (e.g. things that will not be learned, reduced robustness of findings, reduced credibility with retailers and others).

Alternatively, the agency can be asked to provide both a "realistic ideal" option and a "minimum cost" option, again specifying the differences between what will be delivered by each.

Constraints

Anything else that could affect the timing or organisation of the research should be specified here.

Examples of this would include:

- The fact that tasting samples will not be available until a certain date will limit when the fieldwork can begin.
- If there will only be one set of 3-D pack mock-ups available, arrangements will have to be made to transport these between research locations, and only one location will be able to operate on any one day.
- For in-store research, when the client can get retailer permission will determine when fieldwork can begin

Deliverables

Specify here how the results should be delivered. For example, "Detailed PowerPoint document, to be presented at our offices", or "One-page summary of findings to be e mailed, and then talked through on the phone"

Briefing Meetings

The agency (or agencies) should be provided with the briefing document well before the briefing meeting (or video conference, or conference call). This means that they can have given it proper thought and come to the meeting armed with useful questions and early thoughts on potential approaches.

In all cases, this will make the meeting far more productive than if the meeting is simply a first run through the brief. If the situation is a competitive pitch, this is also an ideal opportunity to test the agency's comprehension, quality of thinking, and personnel.

The meeting should be very much a two-way session. The agency should have plenty of questions that will need to be addressed. The various possible solutions which the agency has devised should then be discussed and evaluated. By the end of the session, there should be agreement on the optimal approach. The agency can then go away and finalise details of the agreed approach and costings, with the maximum chance that it will meet your objectives.

In the event that time pressures prevent a meeting or conference call, the next best thing is to make it clear in the brief that you are ready to answer the agency's questions and discuss their ideas by phone before they finalise their proposals. This will help to maximise the chances that they come up with a proposal that meets your objectives.

During The Project

Keep referring back to the briefing document to keep the project on track. As detailed executional decisions arise during the project, the brief (in particular the "Objectives" section) should provide the basis for decision. When faced with a choice, choose the option which is most true to the aims of the brief.

In particular, draft questionnaires and discussion guides should be checked against the objectives in the briefing document to ensure that they will work well to achieve those objectives.

Avoid the temptation (or pressure from others) to add extra aims and questions into the research. If the agreed research approach has been properly designed to achieve the original objectives in a cost-effective way, there will be little scope for adding in other things without compromising the achievement of the original objectives.

After The Project

Taking a small amount of time to learn lessons can be a valuable way of improving the effectiveness of future research. Being clear on the benefits that flowed from the research will also help support the case for research in the future.

The briefing document is the starting point for the review. Questions to be asked include:

- How well did the project achieve its objectives?
- What worked well, and what did not?
- Could we have achieved the same results at lower cost?
- How well did the agency perform, both against the objectives in the brief, and in terms of customer service, timeliness, and responsiveness?
- What would we have done differently, knowing what we now know?
- Overall, what have we learned from this for next time?

If feedback on all this is given to the agency, that will help them to do a better job for you in the future.

Conclusions

1. **A good briefing process is critical to ensuring the effective management of research.**
2. **Whilst the briefing document is very important, the overall process needs careful attention.**
3. **Clarity of objectives is the single most important thing to focus on in writing the briefing document.**
4. **Effective briefing processes involve good levels of engagement and discussion between client and agency.**
5. **A good briefing document is valuable for keeping a project on track once it is underway.**
6. **A post-research review is a valuable source of learning for the future.**

The Author

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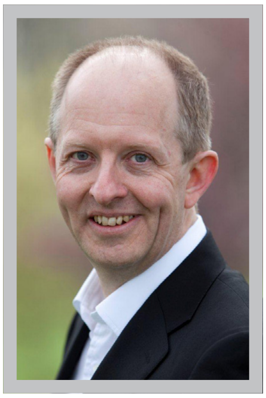

Jonathan Smith is Managing Director of Axis Management Consulting. Axis helps food businesses to succeed with the UK's grocery multiple retailers. It does this by providing consumer/shopper research and consultancy to support the critical tasks of product and packaging development, category management, and brand development.

Before launching Axis in 1996, Jonathan used consumer research extensively whilst working in marketing roles in Procter & Gamble, Rank Hovis McDougall, and St Ivel (Unigate).

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