Before Calling a Marketing Research Firm, Make Sure You Know What You are Doing

Contributed by Garry Upton
Friday, 30 December 2005
Last Updated Saturday, 10 January 2009

Before Calling a Marketing Research Firm, Make Sure You Know What Youâ€™re Doing, Written By Garry Upton From?Decision Analyst IncAlthough companies for years have relied on marketing research to better serve customers and identify new markets, the way they are seeking research today has changed. Before the rush toward globalization and advent of wholesale corporate downsizing, an internal research department usually was responsible for coordinating and managing research needs. Today, however, many different departments are requesting information, and that isnâ€™t always producing optimum results. Because of the internal communications required and a lack of experience in building Requests for Proposal (RFP), time and effort often are being wasted in acquiring usable proposals and subsequent research studies.
?For those of you who (for better or worse) are becoming involved in research requests concerning customer, employee and/or general marketing issues, I offer the following primer as a way for you to move through the process more confidently and efficiently.

A Little Insider InsightIt will help you to know that when you call a research professional, you can look forward to speaking with someone genuinely interested in your call. Researchers, however, lead inordinately harried lives. It is critical then that you and researcher make sure youâ€™re on the same page. Toward that end, here are a few tips:
- Always introduce yourself.

- Take a few minutes to spell you name. Many of the â€˜60s generation took great pride in finding new and innovative ways to spell their childrenâ€™s names. Today Smith may be Smyth or Smythe or Smithe. Kelly may be Kelli, Kellie, Kelley or Kely.

- Be sure to include your companyâ€™s full name (e.g., Cornwell, Consultants to Management, not simply Cornwell). It is easy to slip into using an abbreviated name and not give it another thought, until the proposal you want to send on to others is returned with the wrong name.

- Remember to always give your telephone and tax numbers. Failure here extends the supplierâ€™s requirement for delivering a timely and usable proposal. When applicable, include your e-mail address and web site.

As part of communicating clearly, it is important you take a few minutes to relate the callâ€™s background â€“ i.e., why you and your associates believe research is required. If possible, you should share the names of the departments that will be affected by the research. This will significantly enhance the final product.
As you describe your needs, add any information that might help the researcher build the proposal. For example, if the study needs to be conducted every year, make that clear.
Frequency significantly affects how research is developed. Specific questions not required for a one-time report, but valuable for a study that will be fielded over and over again (tracking study), should be considered.
Review other information that might be used in combination with the study. The additional information (internal date, earlier studies, etc.) will help your researcher design the data files (cross tabulations) produced for the analysis. As with other suggestions made here, share only as much as you are comfortable sharing. Realize, however, that the more you share, the better the proposal â€“ and the subsequent research â€“ will be.

Objectives, MethodologiesTo help you best reach your goal, the researcher needs to understand what your objectives are. If you are developing this project for another end user, prompt your ultimate client (corporate department, or associated partnering company) to help list the objectives. This will help ensure they have been as clear as possible about their requirements.
In your initial conversation with the research professional, feel free to suggest methodologies, but remain open to alternative techniques. Spend a few minutes discussing and better understanding ways in which the use of different methodologies will expand or reduce your overall use of the study. You need to make sure you understand why your contact is suggesting certain methodologies. Many research companies have become specialists. In other words, they have developed an expertise in one or two types of research. You shouldnâ€™t automatically eliminate them from consideration, just make sure you are comfortable that the methodology suggested was selected because it bests delivers the information you need â€“ not because itâ€™s the only option.

BudgetBeing open about your budget helps researchers with the overall study design. However, until you have built a relationship with your contact, you might not be comfortable sharing your budget. Until you reach that point of trust, you can assist the potential research supplier by relating the overall breadth of information required. When doing this, make sure you donâ€™t ask for more than you can afford because that only wastes your contactâ€™s time. Remember, purchasing research is much like acquiring a new vehicle: A less expensive one might still get you to your destination, but not as quickly, dependably or comfortably.
It can be counterproductive to set boundaries for research when you have no understanding of the researcherâ€™s costs. There are various ways to work around this problem, however, including sharing your budget with one supplier â€“ but not all â€“ so a benchmark is established. Be careful, however, when trying to determine why costs vary among research firms.

A particular methodology delivered within a certain time-frame can be more costly for one firm than another. PreparationNow that you know how to express your needs to a research company, drafting internal and external communications becomes an easier task. In terms of internal communications, you now can build a request form for the rest of your stakeholders. As for external communications, if you are sending the RFP to more than one supplier, design a form that will compare each proposal with the others by section. Analyze and share the differences (with your department or clients) you feel are important when making your decision. If you require a final report, and the cost for a personal presentation is reasonable, always make time to include it.

In summation, remember that nothing substitutes for professional marketing research when it is time to find new opportunities or to measure how well your company is performing. Entering the process blindly, however, can cause problems. So take a little time to prepare. Once you do, youâ€™ll find the world of marketing research to be not only beneficial to the bottom line, but an exciting new experience.
(Garry Upton is senior vice president/client service at Decision Analyst Inc., based in Arlington, Texas. Decision Analyst Inc. is a leading international marketing research firm serving numerous Fortune 500 companies as well as a cross-section of other organizations and businesses. Upton can be reached at 817-640-6166. More information about Decision Analyst Inc. can be obtained by viewing the companyâ€™s web site at http://www.decisionanalyst.com/.)