

The Art of The Brief

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The Art Of The Brief, Written By B2B International

Have you ever told a researcher exactly what you want and been surprised and annoyed to find that what you got was neither what you asked for nor given to you when you wanted it? You know you were right. The other party is equally adamant that they did what was demanded. There has been a failure in communication: in particular an inadequate brief. A research brief is a statement from the sponsor setting out the objectives and background to the case in sufficient detail to enable the researcher to plan an appropriate study. As a general rule a market research study is only as good as the brief. The brief is important to the researcher: it educates and influences the choice of method. It gives the objective to which the project is geared.

The brief is no less important for the researcher working in-house than for the agency. Research carried out by company personnel is frequently treated less stringently than when there is a price tag. The in-house researcher does, however, have the benefit of close and constant access to other internal staff who can fill in on background and product details. Though the brief is less formal, it may well be (and should be) as thorough as any delivered to an agency,

The research brief should be a dialogue. It is expected that the sponsor has thought through the problem and set objectives for the study, though these may be modified as the briefing session develops. Nor are briefs irrevocable. Information discovered during the research programme may alter the complexion of the problem and prompt a change in direction. Progress reporting is therefore a vital part of every study.

WHAT A BRIEF SHOULD CONTAIN

Some sponsors prefer to deliver their brief orally, developing points of detail during the initial discussion with the researcher. Alternatively the brief may be fully thought through and committed to paper. This can be especially important when a number of research agencies are invited to submit proposals. A written brief provides a standard which is the same for all contestants.

Whether written or oral, the research sponsor should pay regard to a number of subjects which constitute a good brief.

A background to the problem: this may be a short chronicle of the events which have led up to and precipitated the study. It gives the researcher a perspective and a better understanding of why the project is to be commissioned.

A description of the product (or service) which is to be researched: the researcher needs as much detail as possible. The greater the understanding of the features benefits, construction and uses of the product (or services), the more closely it will be tailored. It can be helpful for the sponsor to state which products are included as well as those which are not. Technical data sheets and product literature are a big help.

A description of the markets to be researched: the researcher must know which geographical territories the study will cover and whether or not it will be limited to certain end user markets.

A statement of the objectives: the sponsor may feel inhibited by limited knowledge of the market research process. The responsibility then lies with the researcher to interpret the brief and give a view on what can be achieved.

Timing and budget constraints: the researcher should be told of constraints if they exist. A limited budget is an obvious example.

The sponsor may also be able to suggest, within the brief, a research method though usually this is left for the researcher to propose.

Finally there may be special aspects of the study which the sponsor needs to mention in the brief. These could cover a wish to remain anonymous, reporting requirements and progress meetings.

It is always helpful for a researcher to see the product or service that is being studied, if practicable. A visit around the plant or to a customer to see the product in use can provide that important "feel" which researchers get from direct contact.

THE ROLE OF THE RESEARCHER

Frequently management know that they face a problem but identifying what it is, its cause and the research solution are left to the researcher. With no formal brief the researcher must dig out the necessary background data himself.

Below is a checklist of questions which could be used by the researcher to draw out the background to design a research programme.

Checklist to guide a researcher when taking a brief:

HISTORY

How long has the company been established?
How long has it concentrated on its present product range?
What was the company's product range originally, and 10, 20, 30 years ago?
Has the company always been sited in its present location?
What factors have influenced its location?

COMPANY BACKGROUND

What is the principal business of the company? What are its subsidiary activities?
What is its total turnover " (a) UK (b) exports?
Describe any holding companies/subsidiary companies
How many employees are there at the establishment?

PRODUCT DETAILS

What are the important products (or services) in the range (by size, capacity, shape, material, etc)?
What proportion of the total turnover does each of the above groups account for?
To what extent are the products standard/custom built?
What proportion of an assembled product is made in-house or bought out?
How important are spares in terms of revenue v profit?
Are any of the products built under licence?

PRICING

What are the prices for each of the important products (are these prices trade or retail)?
How do prices compare with those of the competition?
Is there a published price list?
What is the discount policy?
What power does the salesman have to alter prices?
How price-sensitive is the product?

SALES FORCE

Number of representatives
Are they a general or a specialised sales force " in what way are they specialised?
How many calls a day do they make?
Does the salesforce bring back orders or are they sent in independently?

MARKETS

What are the major user markets for the products?
What proportion of total sales are to each of these markets?
Are any markets known for the product where the company currently does not/cannot sell?
Which markets are believed to offer the greatest scope for expansion of sales?

DECISION MAKERS

Who are the key decision makers who specify and buy this type of product? What roles do they play?
What do decision makers look for from suppliers? PROBE price, quality, delivery, sales service?

COMPETITION

Who are the most important competitors? Where are they based?
What is their rank order/market share?

What are each company's (including the client's) perceived strengths and weaknesses?
To what extent do competitors rely upon this market for their turnover and profit?

QUALITY

Where does the product fit against the competition in its quality?
What are the special features of its quality?
Where is it weak on quality?
How long will the product last?
When it finally fails, why will it do so?

DELIVERIES

What is the current delivery period?
What is the competition's delivery?
What is the ideal delivery?

DISTRIBUTION

How is the product distributed?
What proportion goes direct/indirect? What is the policy which leads to this split (eg size of account - OEM v replacement etc)?
What are distributors' margins?
What other products do distributors sell?
Do distributors actively sell or just take orders?
Who are the major distributors:

- (a) used by the company?
- (b) not used by the company?

What is the average size of a direct account and a distributor account?

PROMOTION

How big is the promotional budget?
How does this break down between:

- (a) media
- (b) exhibitions
- (c) PR
- (d) print
- (e) direct mail
- (f) web sites?

Which media are used? Which are most successful?
What proportion of sales leads come from promotion? How many? What is their quality?
Which exhibitions are attended? What is their perceived value?
What opportunities exist for e-commerce?

OTHER DATA

Full details of names (initials as well) of persons present at briefing; date of briefing; address of company; address to which proposals should be sent
How many copies of the proposal are required - to be sent separately or en bloc?

PREPARING THE RESEARCH PROPOSAL

Having received the brief the researcher, whether in-house or from an agency, must submit a written proposal to the sponsor which states an appreciation of the problem, the objectives, the research method and the timing. If an agency is preparing the proposal, a statement of cost must be given. An in-house job may omit this but many managers still like to see an estimate as a benchmark to compare with other surveys and as a perspective which they can use to relate to the size of any decision which may be taken.

If the proposal is accepted it becomes the contract between researcher and sponsor. The nature of business to business market research is such that it is seldom possible to know in advance whether the objectives or research method will

remain fixed. Invariably slight modifications need to be made. These should always be documented and copied to all parties so they can react to them and in the event of any later argument, refer back to whatever was agreed.

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