

Part Three of Learning to Manage Research Partnerships

Contributed by ValueNotes

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Part three : Setting expectations: Define, and re-define - written by Arun Jethmalani.

1. Be crystal clear about what you want done (or what you have to do)

Research briefs can be maddeningly vague. A “table of contents” does not tell you how much depth is needed. Even a simple task like “create a company profile with x, y, z fields” can mean anything from a document that takes a few hours, to one that takes several days. Be as specific as possible about the depth and breadth of information required, methodology, how it is to be presented, and more. If you have samples to share, that helps.

Don’t assume the other person has understood what you want. In fact, assume the opposite “ especially, if the communication is verbal. It’s a good idea to ask the other party to explain what they understand from the brief, and in detail.

90% of the project over-runs we’ve seen happen due to a lack of (complete) clarity on what has to be done “ necessitating a lot of re-work. And because such problems hurt us equally, we now have a “resolutioning” team dedicated to understanding and defining the research brief clearly. On the flip side, when we give work out, we make doubly sure our partners understand what is needed.

A good sign is when the partner has lots of questions about the brief. This tells you that they’re thorough in their approach and want to be sure they’ve understood what you’re looking for.

Wherever possible, it’s a good idea to ask for early stage interim outputs, so that nobody goes off track. If you’re on the provider side, offer to provide interims. It’s in your interest!

2. Define roles and responsibilities clearly

One of the biggest reasons why research projects fail is “too many stakeholders”. Each one has their own opinion on scope and deliverables, and this leads to chaos. It’s critical to have an “account manager” on each side, especially when multiple individuals in each organization are interacting with each other. These people must be empowered to set SLAs, agree on scope of work, define responsibilities, quality standards, timelines, reporting mechanisms as well as intervene in case of disputes. On top of this, build in a clear mechanism to escalate problems to senior management on both sides.

Problems will happen. That’s part of life. It’s how quickly we resolve them, without rancor or ill-feeling, that helps sustain relationships.

3. Manage expectations at both ends

This is arguably one of the most challenging aspects of working with partners. Be careful of people promising the earth, and on the flip side “ don’t promise what you can’t deliver.

We once engaged with a research firm in the US, to do a series of reports on the power sector. During the initial discussions, our client stressed the need for “equality” English and we said, “no problem”. However, when the reports out, they were unhappy with the language “ which was not sophisticated enough in terms of “finish” to suit a senior American audience. Frustration ensued at both ends “ we had to do lots of re-work, and our client had to invest additional time in editing. Despite the underlying research being of very good quality, we lost the client. In retrospect, we realized that our understanding of “equality” English was different from what the client expected. Had we known that, we could have sensitized the client and/or used a professional editor.

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