

Market Research and Insights Brief: Outline for Research Planning

Project Title:		Date of Brief:	
Client Contact:			

Decision Context

Provide only what is needed to understand the parameters of the project and to understand the business objective. You can do this by answering these two questions:

1. What is the situation you are faced with?
2. What is the complication that makes this project a necessity?

Some Topic Areas to Consider

- **Company Background.** Keep this brief and provide only for new consultants.
- **Strategic Direction.** This is reflected in the business objective and tells the consultant why the objective is important.
- **Market Environment:** Note any significant factor seen as contributing to your current situation. Just because it can't be controlled doesn't mean it should not be factored into the design.
- **What You Have Done.** What have you done to create the issue or try and resolve it? For evaluation research this would need to give an overview of what it is that you need evaluated with the details provided in the appendix or other documents.
- **Knowledge Gap.** Statement outlining the broad need the business has identified and has led to this specific project.

Example. Eris Strategy is medium sized insights based consultancy that focuses on delivering evidenced based strategy for its Australian and overseas clients. As part of its broader business expansion objectives that includes broadening its client portfolio in addition to the services it offers existing clients, it has identified a potential opportunity in the X industry for its unique approach to that links behavioural science with management thinking in delivering strategic advantage to its clients. While we have preliminary data on the market size and feedback from clients who have moved into this industry, we do not know if the industry provides a viable platform for long term growth or what unique aspects of the industry we need to address in our service offering.

Business Objectives

The single (ideally) business objective the project needs to assist in delivering. This relates to the business objective and is something the project is assisting to deliver rather than expected to solely address.

Example. As part of growth objective of Widget Corp to double our business size by 2020 we will increase our customer base by n% attracting y% of new to category customers.

Insight Objectives

The objectives the research needs to deliver in order to aid the business objective. Try to restrict objectives to fewer than five; otherwise project scope creep is likely to occur and results will have no focus and be unlikely to lead action.

Be customer or market centric in your objectives. Asking the consultant to check if you met your internal criteria and objectives can lead to research just reinforcing a bad strategy.

Example.

1. *Determine which of our proposed campaigns have the greatest likelihood of success in attracting new to category customers.*
2. *Understand what aspects of the proposed campaign both drive and detract from attracting our target market.*
3. *Deliver recommendations on which campaign direction to pursue and how to increase their likelihood of in-market success.*

Information Needs

These are the sub-needs that fit under each of the research objectives. This section allows for specific information requests that are needed and to indicate types of analysis outputs. While the Insight Objectives should be customer and market centric these can include more operational oriented concerns, like your KPI.

Information Needs may also be written as questions of the deliverables.

Example.

1. *Determine which of our proposed campaigns have the greatest likelihood of success in attracting new to category customers.*
 - *Are any of the campaigns likely to be effective?*
 - *What determines which is more effective?*
 - *What distinguishes the campaigns in our customers mind?*
 - *How well do they meet our communication effectiveness criteria of being distinctive, relevant and memorable?*

Sample Frame and Analysis Groups

How is your market defined and who within that mark, who are your target markets? Include incidence or population size data if available and importance measures of segments if relevant.

If you are providing contact lists, outline what details are provided and their likely accuracy (bounce back, and time since collected).

Example.

- *Our market are people with home mortgages living in Australia and New Zealand. The main market driver are people aged 35 to 45 years, with one partner in full-time employment and who have had a mortgage for more than five years and still have more than ten years left who reflect x% of the market and y% of those switching provides.*

Deliverables

Specify any specific deliverables or reporting needs.

Example.

We require from this project quarterly presentation and workshops with the brand team and monthly tracking reports. Monthly reports can be in PowerPoint, however, we are open to alternative reporting approaches that increase the accessibility and timeliness of insights to our broader business.

Timing

Provide any other key dates that project needs to deliver to, and key internal dates you need to deliver against.

Budget

If you have no idea then ask for multiple budgets with different value add options, and details on key cost areas.

Pitch Process

Indicate if more than one agency is being requested to pitch and whether there are specific requirements (e.g. pitch presentation).

Background Reports and Data

Section contains information from internal or external reports needed to address brief. In addition, references to additional information that will be made available to the agency are also listed.