
GIVE YOURSELF A FIGHTING CHANCE
BY WRITING A GREAT RESEARCH BRIEF

At TLF, as you might expect, we receive quite a number of research briefs and tender documents. Not every project we conduct is the result of a formal briefing document, and we don't always need one. Sometimes a couple of calls is all we need to get us on our way to producing a great piece of research that gives our clients what they need. That said, some organisations employ a more formal procurement process and the brief forms part of this.

The briefs we receive vary considerably in quality. We receive some excellent briefs. It's fair to say that in most cases no brief is better than a 'bad' brief. But what is the outcome of a bad brief? At worst, a bad brief can mean you end up with paid-for research that does not give you what you want or need. It is an expensive wasted opportunity. Worse still, it may be a lost opportunity because you can't simply go back to customers and revisit the exercise without irritating them or even breaching a few rules and regulations. At best, it may mean that you have to repeat the procurement process because the agency's response does not correspond with the exercise you had in mind. This can be waste of valuable time as well as being costly.

As an agency we want to deliver first-class research and meet our clients' objectives. If help and guidance is required we are happy to provide this, we don't need asking twice. What can sometimes be a little frustrating for us is when a client is very specific about what they want, it is clear to us that their preferred approach will not deliver, yet there is no way for us to reference this or suggest alternatives. That's not to say 'specific' isn't a good thing—it can be very useful providing it will deliver against the objective, and having a clear vision can be useful.

We're also very conscious that when we respond to a brief we are being tested. We are not just being given a chance to tender for the work we are also being measured on our 'listening' skills, for example whether we are answering the question, adhering to the required number of words, or meeting stated budgetary restraints. In some cases, pitching in with a new idea can be viewed as an inability to interpret or answer the questions and be counted as a black mark or 'no-no'. This doesn't work for either side.

In this article, I am going to take you through what you need to consider when writing your brief. I am not suggesting you include everything I've listed every time you commission work but hopefully there are some useful pointers that will help you on your way to getting the research you are looking for.

The structure of your brief

Why does the structure matter?

Put simply, your brief needs to flow logically to help the research agency understand your organisation, what you are looking for and why.

The more accurately the agency understands your needs, the more likely it is that their proposal will meet those needs and help you to achieve your research objectives.

Broadly speaking, a research brief should follow the structure below:

1. *Background*
2. *Objectives*
3. *Previous research*
4. *Approach*
5. *Reporting and deliverables*
6. *Timing*
7. *Budget and 'added value'*
8. *Credentials*
9. *Closing dates and contact details*

TIP: A research brief does not have to be long and it does not have to be detailed. It does not have to contain all the information listed in this article. However, pick out the key information that you feel will be important for the agency to respond accurately to your brief. Remember a credible agency may want to ask questions to fill in any gaps in their knowledge, so give them contact details of someone they can talk to to help them put together their proposal. This may save time in the long run.

1) Background

This is your chance to help the agency understand your organisation, your customers and the markets you operate in.

An agency that understands you is in a good position to answer your brief appropriately and make worthwhile suggestions or recommendations that you may not have thought of.

What sort of information should you include?

- ***What does your organisation do; what products or services do you offer?***
- ***What is your company history? Is it a parent company or part of a group?***
- ***What is your turnover?***
- ***What is your market share?***
- ***What markets or sector do you operate in?***
- ***Who are your competitors?***
- ***Who are you customers and where are they?***
- ***Why do your customers use you?***
- ***What is your strategy?***
- ***What are your challenges?***

TIP: Don't worry if you don't know all this information – do your best and consider what is relevant. There may be information you consider to be commercially sensitive and unable to share. A good agency will work with you by asking you questions to fill in any background gaps.

2) Objectives

In order to deliver the information you need to answer your questions or address your problem, the research needs to have a defined aim or objective. Without this there is a danger that you will gather plenty of information but then discover it doesn't give you what you need.

Defining the objective will help the agency consider what it should do to generate the information you need and, if relevant, to challenge your thinking.

What sort of information should you include?

- *If you have one, include your stated objective.*
- *What is the purpose of the research; what is driving your need for the research?*
- *What do you want to find out... and why?*
- *What do you expect the results to deliver?*
- *What are you going to do with the information you gather? Is it for improving customer satisfaction? If you are tracking results over time, gathering information to report to a government body, or getting a measure on which to set targets or pay staff performance bonuses, make this clear.*
- *Who are you going to share the information with? Your stakeholders? Your customers?*
- *How are you going to share the information?*

TIP: If you have a plan or have been given a clear objective, make this clear in the brief. If you are not sure exactly what you are aiming for, don't worry – you can use the brief to share your 'problem' with the agency and they will work with you to agree objectives together.

3) Previous research

You may be experienced in the research field or think of yourself as a beginner. Let the agency know if you have done prior research (as an individual or as a company) so the proposal is pitched at an appropriate level.

If you want to retain elements of what you have done before let the agency know, similarly if what has gone in the past has no bearing on how your go forward.

What sort of information should you include?

- *What research has your organisation done?*
- *When was the research done?*
- *What approach was taken? How was data collected? Who took part? How was it reported?*
- *Was it considerer successful? What did you like about it? Where did it fall short?*

4) Approach

There are numerous ways of conducting research, collecting data, and reporting the findings. All approaches have pros and cons.

It is useful for the agency to know what approach you have in mind, if anything, and why. This will help them understand your thinking and assess whether your desired approach is the best one for the job.

What sort of information should you include?

- *If you have an idea of how you would like to gather data (i.e. telephone interviews, web surveys etc.), lay this out in your brief.*
- *You may have considered who you want to take part (e.g. which customers and why), how many responses you would like, and any segmentation.*
- *Explain the rationale behind your thinking. Is it based on budget, previous research, or what others do?*
- *If you know, describe who you want to take part (and why), what you want to find out, and how you would like to gather this information.*

TIP: Having a clear idea of what you want is not a bad thing. However, invite the agency to make additional suggestions or offer alternative approaches as they see fit. There may be some better approaches that you had not considered, or other alternatives that are worth exploring.

5) Analysis, reporting, and deliverables

The way in which the research is presented back to you will make the difference between clearly understanding the findings at first glance or wading through pages of data.

Consider what you need or are expecting to see. Analysis and reporting takes time and will account for a large proportion of the budget, so you don't want to pay for information you don't need at the expense of information that is vital for you.

What should you include?

- *How would you like the results to be reported back to you? What type of analysis or statistical techniques do you expect to be used?*
- *How do you envisage the findings of the research coming back to you? Charts, tables, slides, written report, online portal, raw data?*
- *What type of information do you expect to see? Are there any segments or splits in the reporting that are particularly of interest to you?*
- *Describe any information that you definitely need... for example if you need a Net Promoter Score (NPS) for internal reporting, or if results contribute to bonus payments make this clear.*
- *Do you need a formal presentation of the results by your agency? Who will be the audience? How many presentations will be required? Where will the location of the presentations be?*

TIP: You may have no idea of what you want to see or how you would like the results to be presented back to you. In that case, let the agency do the work and describe, in the proposal, what you will receive back.

6) Timing

It helps the agency to know how long you expect the work to take (they can then decide if their resources will enable them to meet your requirements). The agency can also assess whether your timescales are realistic based on what you are looking for.

In some cases, an agency may suggest you reconsider your timescales in the interest of conducting quality research. If they do this this is usually because they want to do a great job for you and think you would benefit from allowing more time.

What should you include?

- *When do you need the results of the research back to you? (And if these dates are flexible or not).*
- *Any timelines or key dates that have to be adhered to within your organisation (e.g. if the results are needed for a board report).*
- *If you need a detailed schedule of what work the agency will do, and when, to meet your timelines, ask for this.*

7) Budget & 'added value'

You may or may not have a budget in mind for the research. If you do, include this in your brief (it does not have to be precise). This is so that the agency can tailor their approach and response to fit your resources (and avoid wasting both your time and their time with an unsuitable proposal).

The agency will also be able to determine if your budget is appropriate for the required work. In some cases you may need to discuss tweaking the scope or the budget to arrive at the most satisfactory approach.

'Added value': there may be benefits that are not paid for yet represent great value for you. These benefits may be intangible and unique to the agency delivering the proposal (e.g. their expertise, support or training etc.).You need to be aware of 'added value' when selecting your agency. It is easy to overlook the value of such benefits.

What should you include?

- *Do you have a budget? What is it? What is it based on? Does your budget include VAT?*
- *How do you envisage paying? What are your payment terms (e.g. 30 days after completion)?*
- *Would you like the agency's proposal to show the fees including or excluding VAT?*
- *Do you need one total or a breakdown of fees? If a breakdown, how do you want it broken down (what are the categories, e.g. field work, reporting).*
- *Do you want expenses included in the fee or listed separately?*

Added value:

- *Ask the agency to specify the added value they can deliver and to explain what they can offer that no other agency can provide.*

TIP: Invite the agency to submit fees for additional work which you may not have asked for but they feel would be beneficial for your organisation to consider.

8) Credentials

You need to have confidence in the agency to deliver on your brief and its promises.

Once the agency is appointed all your stakeholders have to believe in the credibility of the research and know it has been carried out in accordance not only with best practice but also with all statutory rules and regulations.

What could you ask for?

- *Why does the agency think it should be appointed?*
- *What is the agency's standing – how many employees, what is its turnover, where is it based, how is it structured?*
- *Is the agency a company partner of the Market Research Society?*
- *Who does the agency work with? Who are its current clients? What does it do for them?*
- *What is the agency's area of expertise? How does this fit in with your requirements?*
- *What resources does the agency possess... staff, systems etc. What does it handle in-house, what does it outsource?*
- *Who are the employees? How are they trained? Who will be working on your research?*

Statutory requirements

- *How does the agency deal with statutory requirements (such as the GDPR, data protection and information security)?*
- *What accreditation does the agency have in terms of quality (e.g. ISO9001) and information security (e.g. ISO27001)?*
- *Ask for details of procedures (documentation), certificates and accreditation as well as insurance documents (if relevant). You may choose to ask for proof at the appointment stage but ask for confirmation that these documents are available and up to date.*

9) Closing dates and contact details

Knowing when you will receive the proposal(s) will help you plan your time. Give the agency enough time to do your brief justice, consider your requirements and how to meet them and then submit a thorough response. You are making an investment and this will ensure you spend your budget wisely.

What should you include?

- *The closing date for submitting the proposal. If the close is at noon or midnight make this clear.*
- *Where the proposal should be sent and whose attention it should be marked for (i.e. contact email address or postal address).*
- *How you expect to receive the proposal (i.e. a hard copy or electronically).*
- *Whether you have a preferred format.*
- *Next steps – whether you will select a provider from the proposal or invite a short list to meet with you (if you know the dates of those meetings, give them).*

Whilst not essential, you may also decide to explain briefly:

- *How you are going to select your provider (any scoring that may be applied).*
- *Who is going to be involved in the decision process.*
- *The date you will let the agency know the outcome.*

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Warming Up: Improving response rates and quality of response through effective pre-survey communications.

Customer Survey FAQs: Winning over internal stakeholder who are sceptical about outsourcing your survey to an agency.