••• the business of research

Wrong symptoms, wrong cures

10 heresies in marketing research

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snapshot

As part of a wider discussion on the current state of MR, the author argues for a refocusing on the outcomes of research rather than its processes.

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Heresies are not just opinions or beliefs that contradict the current prevailing perception of reality. They are also seen as highly pernicious, false perspectives whose very existence threatens the consensus necessary to maintain public order. No surprise then that heresies are generally forcefully rejected and those promoting or even holding such beliefs (heretics) are often persecuted.

Of course any field of endeavor, whether religion, science, medicine or profession, etc., will have, at any given time, a generally accepted perspective on its sphere of activity and how it relates to the rest of the world. The key question is how open that view is to constant examination vs. how rigid and resistant to countervailing opinions.

Our profession seems to have adopted a somewhat schizophrenic approach on this question. On the one hand, we have over the past two decades (at least) thrown ourselves open to innovation and self-criticism, adopting new methods while decrying our declining influence with urgent calls to reinvent ourselves or face extinction. But these reactions have often been uttered in singular lockstep. Each innovation in data collection or generation, analysis or method is hailed as the killer app that will free us from the shifting landscape upon which we find ourselves. Every challenge is met with a solution that we assure ourselves will have the same effect.

In many cases, these solutions demand we shed our past completely and embrace a brave new world. Those who demur, or who take a broader perspective, are seen as relics of the past or even dangerous resisters likely to hold us back from achieving that final transformation that will at last grant us that longed-for seat at the table. And yet, even those most open to transforming themselves into anything-but-researchers have not succeeded in achieving these ends.

I have long found myself in the camp of the heretics. I believe we have been far too willing to give up the substantive things that provide our legitimacy while hanging on to the more superficial aspects. We have

been too eager to emulate others rather than seeking to grow ourselves organically into our next incarnation; seeking salvation in semantics and role-playing rather than heavy lifting. And we have been too reactive, too threatened, too insecure to assert our proper role in the corporate and social environments in which we exist.

Too often, I fear, we have misdiagnosed our own malady and focused on the wrong symptoms, leading to the wrong cures. We do need to face ourselves and our roles objectively but perhaps not as we have done in the past. And we need to find our solutions within our own strengths, not those of our competitors.

In the face of these challenges, I have come up with my own list of 10 heresies that try to reframe our situation somewhat differently, as well as offering radically alternative solutions. These are organized in pairs – a problem with a solution – much like the travelers on Noah's Ark. Given the rising flood of big data and other challenges, this seems to be an appropriate approach. And who knows – maybe it will be the heresies that ultimately lead us back to dry land.

1. **We are boring!** Let's not kid ourselves. There is a reason clients skim most of our proposals and demand the shortest executive summaries to our reports, why responsibility for liaising with research personnel is delegated as far down as possible and why senior executives skip our presentations or skip out – physically or mentally – at the earliest possible opportunity.

Our deliverables are respectable but dull, too eager to prove a point with a mountain of numbers or observations. Even our insights, conclusions and recommendations tend to be delivered in the same, matter-of-fact, unemotional tone that evokes yawns. We believe the brilliance of our methods, findings and interpretations generates its own excitement. It doesn't.

2. **We need to be showmen/women!** We must assume this aspect in every communication we make, from credential decks and initial proposals to final reports and presentations. Despite our deepest fears, we do not shed our professional credibility to do this. But we do need to engage our audiences fully and that means we must entertain and as well as inform and persuade. We must express emotions, even while maintaining objectivity. We must not appear neutral but demonstrate clearly that we care about the client's success. This demands a writing style that talks to people rather than assuming a tone of mechanical detachment.

Live presentations are our best opportunities to display the richness of what we've learned as well as our ability to guide decision-making. Forget the deck! You are the presentation; the deck is just a prop. Show the fewest pages of findings with the fewest findings possible. Focus on the insights and conclusions that emerge and the implications for the company and its business. Give the greatest weight to your recommendations.

Humanize your presentation persona, engage the audience with candor, wit and false humility. Ask them questions. Embrace storytelling techniques. And don't give away the store at the beginning but continue to manipulate expectation throughout the show.

3. **The subject of a proposal is the client not the proposer.** This is a basic rule that most suppliers just don't understand. I've read far too many proposals that provide a perfunctory recitation of the background and objectives offered by the client in its RFP and then launch into pages and pages singing their own praises, usually in boilerplate. This often includes long lists of capabilities, countries where offices are located or in which they operate, lists of prior clients and testimonials and maybe even a few case studies.

Little thought is given to how relevant any of this is to the immediate needs of the client, who may only be interested in one type of exercise conducted in a single country. The actual proposal often just parrots what is found in the RFP, with costs and timeline. If one of the supplier's proprietary methods can be applied, that is usually cited as the solution regardless of how good a fit it may be for the specific situation at hand.

This approach is totally backwards. The proposal should deal primarily with the needs of the client, their immediate and longer-term objectives and how these can best be addressed by the supplier. The only credentials given should be those that relate to the specific assignment at hand. Anything else should be consigned to the appendix and kept as succinct as possible.

4. The proposal process is a means to initiate an ongoing dialogue. Making the client the subject of a proposal usually demands a lot more information than is provided in the RFP. These relate to knowing a good deal more about the background of an assignment, what the full objectives really are and, most critically, what decisions are likely to be made based on the research. Suppliers should seek this information as forcefully as possible; in-house researchers should encourage such discussions on a one-on-one basis, over the phone or in-person if possible. Without this type of knowledge, how can the supplier possibly offer the best design or create the strategic framework they need to deliver?

This raises the other issue of how best to meet the stated objectives. Many RFPs provide a fixed framework that allows an apples-to-apples comparison in terms of cost but assumes the client has already determined the best method for meeting these objectives. Often, it hasn't. Suppliers should be encouraged to come up with alternative approaches that may ultimately provide more valuable or usable information or be better-suited for developing a strategy.

In addition, suppliers should take the initiative to learn as much about the client company, its category and current situation as possible from secondary sources and weave these into the proposal. The purpose here is not to prove how smart you are or to tell the client something about their own business they don't already know far better than you do. Rather, it's to provide a larger context that substantiates your specific solution, which is not just a method that leads to new information but a strategy that fits into their real-world situation.

5. Projectability still matters. Difficulties in generating random samples combined with the shining baubles of panels, social media data and endless analytics have led many to conclude that worrying about projectability is a waste of time. Nothing could be further from the truth! In most cases, our clients are ultimately interested in the market as a whole. That's the world where they live or die. Less-rigorous approaches can provide insights and useful information and may even lead to innovations. But how any of these relate to the real marketplace remains the *sine qua non*.

This is particularly crucial when considering motivation. Individual respondents or subjects can be very articulate about why they do something but how typical are they, really? This also relates to anything we offer in a deliverable – how does this information/insight/conclusion relate to reality? And will acting on this information, etc., truly have the impact we expect?

6. Sampling is the best answer. We have largely given up on sampling, a dying art of fading traditionalists. And no doubt, our customary methods have grown increasingly irrelevant. But I believe we need to devote immense energy to finding new, innovative ways of generating representative samples in all the quantitative work we do. This should be our top priority in the coming years. Many will dismiss this as impossible – we simply don't know enough about the people who produce our data, actively or passively, to establish such a framework.

True enough. But that doesn't mean we shouldn't be trying to bridge this gap. Marketers are scrambling to peel back the identity of individuals who scamper around the Internet. Without going down that rabbit hole, we should be able to employ some of the same approaches to establish a rational, measurable perspective on the individuals and groups who serve as the "source" of our knowledge, even if we don't call them our "sample." At the same time, we need to be able to capture human activity both online and offline. I don't pretend to have the answers but this is the most critical challenge we face today.

7. We need to charge more … for a different deliverable. Give me a break! With all the accelerating demands to produce more for less in less time, this sounds like trying to run against a gale-force wind. And of course, as long as our primary deliverable is essentially data or information, it is. But we need to recast our deliverable as a creative service and intellectual property, akin to advertising creative or PR strategies. We have made the mistake of trying to rebrand ourselves as consultants, purveyors of guidance, but our audience has often failed to take the bait. No matter how we try to change our clothes, they still believe we are essentially delivering numbers, a commodity bought from the lowest bidder.

We have, of course, a far better handle on reality than most consultants whose "research" efforts are often rudimentary and self-serving. But we need to use our findings as the basis for a far larger strategic structure that demonstrates our understanding of the overarching business issues and translates into concrete actions. That's what we should be selling – and demand a price commensurate to what it's worth. We shouldn't be focusing on rebranding ourselves but radically recasting our deliverable, not just from data to guidance but to strategy.

8. Success will depend on a subversive partnership between in-house and supplier researchers. Revamping our product in this way will demand a massive effort, not only to deliver (on our part) but to educate our stakeholders. This will require a strong alliance between research buyers and sellers. Buyers will have the major job of convincing their internal clients about what they're really buying and sellers will have to step up to the plate and really deliver strategic plans, not data.

For the internal researchers, this will mean fighting the procurement and budget-conscious marketing departments, essentially pushing them to redirect funds now going to consulting firms and other strategic "partners" to "research" suppliers. It will also mean recapturing some of the dollars now flowing into analytic services back into the research pipeline (see below).

The research agencies will need to evolve their product as described above, which will require a whole new level of skills and business acumen. Many firms will probably not be able to make the adjustment or will have to acquire or merge with enterprises that can do this.

But to succeed, the researchers from both sides need to develop protocols that will bypass or undermine current purchasing systems. One example will be to fight against the "level playing field" approach to bidding out assignments, which virtually guarantees a low-cost, unimaginative solution. As noted above, suppliers should be encouraged to offer their own approaches and be able to discuss these directly with the in-house researchers and be rewarded for their creativity.

9. Big data can be a friend. The research community seems to have experienced a meltdown in the face of this rising tide, fearing that the existence of huge data sets will render our much smaller bases for drawing conclusions meaningless. But this reaction misses the point. We've been dealing with large data sets for years and, more importantly, been able to distill insights and implications from these better than anyone else. Big data in aggregate is really just a big dummy whose value is wholly dependent on the skills of those doing the analysis. While specific analytic skills are definitely required to do the number-crunching, its greatest value, as always, will stem from being able to assign meaning to what the data show.

So rather than considering big data an enemy, we should regard it as just another source of information that we can mine and interpret to produce our strategic frameworks. Critical here will be our ability to integrate big data learning with that derived from more traditional sources (surveys, qualitative learning, etc.) and social media data. Synthesis must be the catchword. But we must also make clear that big data analytics as a stand-alone deliverable is inherently limited.

10. We need to run the big data show. The rationale is our unequaled ability to derive meaning from data, as well as our skill in synthesizing information from multiple sources. But we won't win this one without a fight. We've already yielded the field in many cases, allowing marketing managers and others to engage other types of analytic personnel to deal with BD, or even divert the relevant funds to another department.

Our primary audiences, then, are those who control big data analytic funding. Here again we need a concerted effort involving both internal research staff and suppliers who can really deliver big data analytics in a holistic way. One way to do this would be for researchers to provide a free demonstration of what they can do – essentially building a strategic framework using big data and all other information sources available that will prove, once and for all, we can outshine all other comers.

Given the size of the monies at stake, this struggle will not be easy and could get nasty. The analytics jocks who have been brought in to crunch the data won't willingly concede their role. And the marketing managers, etc., who are mesmerized by the promise of big data and who are happy not to have to deal with (or pay for) research again may not be open to changing their mind. But we need to make our case forcefully and frequently, engaging as many other players in the corporate environment who care about the future of the company.

The ultimate argument is that we can provide the most accurate, rigorous and thoughtful basis for decision-making at all levels. The risks of relying on undigested data, no matter how extensive, can lead to costly mistakes.

Inherent value

These 10 heresies do, in fact, fit together to form a unifying vision of the current state of our profession, as well as a singular approach to moving forward. Underlying all of them is the genuine belief in the inherent value in our training and approach to information. This part of our heritage should not be compromised. We need, however, to get away from the more limited view of what we do. And here, our mistake has been to focus on the doing rather than the outcome.

Our most critical task is to enhance our product, our deliverable, from information or data-based guidance to a much larger strategic structure. Our twin challenges are to actually accomplish this and to persuade the rest of the world, i.e., our skeptical stakeholders, that that is indeed what researchers deliver.

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