

DECISION-MAKERS' GUIDE: THE 12 KILLER QUESTIONS

The research industry is providing more holistic
consumer evidence to aid decision-makers

Published by ESOMAR

DECISION-MAKERS' GUIDE: THE 12 KILLER QUESTIONS

Let's develop a 'charter' that gives clients the ammunition to evaluate the real quality of consumer evidence

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This article follows up on the piece in December's Research World about whether we should now consider preparing some form of 'Charter' that would help clients know what 'telling' questions to ask to establish the robustness of the consumer evidence they are using for decision-making. The introduction of a Charter would put our industry in the driving seat when it comes to 'adjudicating' on the (new) rules that should be applied when determining what constitutes sound evidence based decision-making.

WE MUST AVOID AN 'ANYTHING GOES' APPROACH TO EVIDENCE

This is an important development as we are edging towards a point where what we have in place to evaluate the quality of what we do as market researchers is going to look very thin and outdated. This is because these days it is difficult for market researchers to stay close to the gold standard of 'orthodox' market research. We often have to go beyond the literal consumer evidence and make various creative interventions to provide customer insights. So if we do not develop something along the lines of a 'Research Charter' there is a danger of an 'anything goes' approach to evidence based decision-making emerging.

To get industry-thinking underway about possible content, of such a Charter, in this article we provide

some illustrations of the types of questions that could be asked by clients to investigate each of the subject areas that we have outlined in the article in Research World. These questions are at the very early stage of development and will need considerable refinement before we arrive at the 'killer', telling questions that will give the Charter its bite and edge.

THE 12 KILLER QUESTIONS

1. To what quality level was the research conducted?
2. What impact will the consumer evidence have on the final decision?
3. Was the research design fit-to-purpose?
4. What was the 'agenda' behind the study?
5. To what extent did the research accurately reflect the target group being researched?
6. To what degree has the interview medium affected the results?
7. Did the interpreters of the research evidence really understand the critical 'research effects' at work?
8. Was the appropriate analysis approach deployed?
9. What level of 'business conceptualisation' has been brought to the presentation of the consumer evidence?

10. How well has all the available evidence been integrated into an impactful compelling story, and have the outcomes of the study been presented in a way that will influence the decision-making audience?

11. To what extent has the data been presented in the context of what we know about this genre of evidence-based decisions?

12. Has the tactical feedback from the latest research study on this topic been incorporated into a wider 'meta-analysis' in order to identify any over-arching strategic trends?

We welcome your views on the idea of a Research Charter

We welcome feedback from you on:

a) The concept of introducing a set of guidelines – a Research Charter - to help our clients know what questions to ask to establish the robustness of evidence they are using for decision making.

b) Whether you feel that the overall question categories that are being proposed here for the Charter are sufficiently comprehensive.

c) Your suggestions for 'killer' (telling) questions that will help decision-makers get to the heart of the 'true' quality of the consumer evidence upon which they are relying.

d) Your views on how best to develop the checklist of concepts and principles we will eventually need to include in the Charter to help decision-makers evaluate the quality of the 'answers' they have received to their questions.

Please e-mail your comments to feedback@esomar.org

1. TO WHAT QUALITY LEVEL WAS THE RESEARCH CONDUCTED?

Up front in the Charter – and a comparatively straightforward task - is the issue of framing the questions the decision-maker should ask to in order to establish the overall quality assurance standard to which the research was conducted. This line of enquiry would include simple questions to establish whether the research was conducted by agencies affiliated to different industry organisations – where membership is known to be a proxy for attaining a particular quality standard.

2. WHAT IMPACT WILL THE CONSUMER EVIDENCE HAVE ON THE FINAL DECISION?

The Charter could then include some questions to help the decision-maker establish the impact a particular piece of consumer evidence will make on the final decision. In some cases the consumer evidence will be a critical driver of the decision. But in other situations the consumer evidence could play a much smaller part in the decision-making process. Therefore we need to provide the decision-maker with questions they can ask their (co)management and market intelligence specialists so that at the outset the decision-maker is clear about the 'sensitivity' of his/her decision to a particular item of consumer evidence.

• If there was no consumer evidence available to make this decision, how much would the risk of making a wrong decision be increased – would this take the decision to an 'unacceptable' level of risk, a 'manageable' level of risk, or hardly make any difference?

3. WAS THE RESEARCH DESIGN FIT-TO-PURPOSE?

We need to frame some questions to allow the decision-taker to establish where the research

evidence they are considering using falls on the market research 'radar'. Is this a study that represents the highest level of quality and thinking the industry can offer. Or was this piece of evidence always intended to be no more than a light hearted 'snippet' of evidence to throw into the media melting pot. The questioning to get to grips with this issue needs to focus on the important issue of whether the study struck the right balance between understanding the issue under investigation at an appropriate level of depth, rather than having gone no further than providing a general overview. In short, the Charter needs some questions to help the decision-maker decide how well the research study struck the balance between 'shallowness' and 'depth'. Do we have a research study that has been structured in a way that can make a serious contribution to the putative decision? Or is this a research study where from the outset many critical problem definitions were never fully resolved, and/or the research structure chosen to deal with the problem was never fully thought through, resulting in the decision-maker ending up with superficial, unsophisticated, off-target, structurally flawed, or 'thin' evidence. (And this issue needs to take into account the budget that has been allocated to this problem.)

• If the research team – with the benefit of 20/20 hindsight - were to (theoretically speaking) construct the 'ideal' research solution to deal with this problem, just how far away from this ideal would be the actual research approach actually chosen. (If the 'ideal' was 100, how many marks would you give to the current research study, and given this rating, how much risk is associated with proceeding on this basis – is this a 'totally acceptable' risk, 'risky but manageable,' or involve a 'totally unacceptable' level of risk?

4. WHAT WAS THE 'AGENDA' BEHIND THE STUDY?

It is important for the data user to establish the

motivations behind those who commissioned (and also executed) the survey. We need to equip our end users with some penetrating questions they can ask the commissioners and/or suppliers of their data to establish whether any of these 'predilections' may have interfered with the independence of the research approach taken. The decision-maker needs to know if the overall 'stance' adopted for the study could have created any major systematic biases. We need questions to help the decision-maker understand the way the architects of the survey 'see the world', and assess whether this has skewed the outcome.

• Thinking about the agency that conducted the research is there any way they are linked with the need to produce a particular outcome for political or financial or methodological reasons? Does the organisation supplying the budget for this project expect a particular outcome, and if so, if this outcome is not achieved, on a scale of 1 to 10 (where 10 is considerable damage, and 1 is hardly any damage at all), what does this particular outcome for this study mean for the commissioning organisation?

In what context was the research conducted?

Even on the assumption that the motives behind the commissioning of a piece of evidence were entirely 'legitimate', and this has not introduced any kinds of bias, there remains the related issue of the context in which the research was conducted. Experienced market researchers know that when it comes to interpreting data, drilling down into ever increasing levels of detail only goes so far in improving our understanding of what is really going on. Invariably, the road to truth lies in understanding the wider context in which the research study was conducted. So, the decision-maker needs to know whether his evidence has been influenced by the 'prevailing context' at the time at which the evidence was being collected?

• At the time the fieldwork for the study was being conducted were there many major events happening

on a worldwide, countrywide or local community, basis that could have in any way influenced the thinking, and actions, of people taking part in this study? Outline the 'maximum' effect this 'context' could have had on the results, and then the 'minimum' effect - and explain the precise way the analysis team has 'compensated' or 'adjusted' for any contextual influences in its interpretation of the results.

5. TO WHAT EXTENT DID THE RESEARCH ACCURATELY REFLECT THE TARGET GROUP BEING RESEARCHED?

This above question will, of course, be familiar to experienced researchers. First, there is the issue with quantitative research, of whether the research design was structured in a way to ensure that the relevant respondents were not excluded from the study. Then there is the need to establish the extent of 'sample bias': are there people in this target who were correctly included in the definition of the survey population, but who then did not respond? These are issues that lead us into questions about the achieved level of 'response' (or, in the case of quota samples, 'strike rate'). And this leads us onto further questions about what such a level means with regard to the interpretation of the results. This is all, of course, very familiar and well documented territory. So, here the challenge for the Charter is not so much knowing what questions to ask, but in finding ways of constructing penetrating, yet accessible, questions that will alert decision-makers to any data that has been faithfully reported, but because it carries unacceptably high degrees of sample bias, is nonetheless dangerous to use for key decisions.

- If you were to compare the profile, the perfect/ideal target sample of the respondents to whom we should have been speaking to on this study, with the profile of those we actually interviewed, are there any critical points of departure in these two profiles? If so, what

implications do these points of difference have for the interpretation of the findings – and has enough been done to 'compensate' for this discrepancy? Is it now 'safe' to proceed with this off target, less than ideal sample?

6. TO WHAT DEGREE HAS THE INTERVIEW MEDIUM AFFECTED THE RESULTS?

The market research industry has been incredibly successful in adapting data collection methods to meet clients' information needs. But there is perhaps a danger of this pragmatism being accompanied by a lack of resolve to spell out for the end data user the precise implications of using different types of interview medium to solve a particular problem. For example, we all know that online surveys are in many ways the saviour of our industry. They provide a highly effective, low-cost way of investigating various issues. But, by the same token, there is also a rich body of psychology that tells us about how people may behave differently - on certain surveys on certain topics - when embedded in an electronic (internet type) communication, as opposed to how they might behave when operating on, say, a face-to-face basis. So, it is critical that we do not brush these possible effects of the interview medium under the carpet. It is important for us as an industry to explain in a transparent way what may happen in different interview scenarios. So, we must equip the decision-maker with the set of questions they should ask to help them establish to what degree (if at all) the interview method has influenced the findings. And, following on from this, there is the issue of exactly how the data analyst has 'compensated' for any such shortfall in the subsequent interpretation.

- The data was collected using the (name method). If the study was conducted using (insert alternative e.g. on-line, telephone, face-to-face), to what degree, if at all, do the research team think they would have obtained different results? If different, would these be substantially different or slightly different? If

substantially different, has this been factored into the current interpretation?

Was the 'dialogue' that took place between the respondent and the interviewer/researcher reasonably natural, or was it contrived and/or stilted?

Building on the above point, there is the issue of the 'character' of dialogue that took place between the respondent and the interviewer/researcher. The process of asking questions and listening to answers as the basis of understanding what people do and think (and establishing how they may behave in the future) is, at best, a coarse instrument. But we do the users of our data no favours by glossing over some of the 'challenges' our industry faces in making sense of the respondents' 'literal' responses to our qualitative and quantitative questioning. Thus, the Charter will need to include questions to help the data user establish just how appropriate and successful the use of various types of 'direct', and 'indirect', questioning techniques have been in going beyond respondents' tendency to reel off generalised, what we may term 'platitudes', rather than their 'true' attitudes. This calls for us to equip end users with some questions that will help them determine the overall quality and meaningfulness of the dialogue that took place between the respondent and the interviewer. It is critical for the decision-maker to reassure themselves that they understand the 'frame of reference' within which individuals were giving answers to questions. Much poor quality market research is the result of surveys that have not done justice to an individual respondent's knowledge: the research has just not allowed participants to fully explain their viewpoint. The result is often mindless tables of yay, or nay, giving data that could lead the data user widely astray when it comes to understanding a particular market, or group of consumers. So, it is important for the decision-maker to be clear about the salience of the issues that were being presented to individuals.

• Did any member of the research team answer the questionnaire themselves, as if they were a respondent? Would this person say the interview has done justice to what they knew, and/or wanted to say, about this topic, or did the questionnaire only do partial, or little, justice to what they wanted to say? What does this mean for the results we are looking at?

7. DID THE INTERPRETERS OF THE RESEARCH EVIDENCE REALLY UNDERSTAND THE CRITICAL 'RESEARCH EFFECTS' AT WORK?

Experienced market researchers will, of course, pass their qualitative and quantitative evidence through what we might call various 'knowledge filters' in order to establish whether there were any key 'research effects' at work that materially affect the interpretation of the evidence. These 'knowledge filters' have been built up by the market research industry over decades of practical research experience. Seasoned researchers are aware of a whole array of issues, such as, the quality of a respondent's memory in recalling details of different types of past behaviour. This is familiar territory to the market research community. But the challenge, in developing a Charter, is how to equip decision-makers with some penetrating questions they could ask of their data suppliers to unearth any critical 'research effects', and allow them to check that an informed appreciation of the 'effects' has been factored into the interpretation of the data.

• Thinking about the most critically important piece of evidence being presented in this survey (specify), just how sensitive is this to a particular methodological approach or technical effect? What has been done to monitor the chances of a particularly powerful 'technical irregularity' inadvertently steering the findings slightly off course? How do we adjust for this?

8. WAS THE APPROPRIATE ANALYSIS APPROACH DEPLOYED?

The Charter needs to include questions that help the decision-maker establish whether the 'appropriate' approach to the analysis was pursued. This is clearly a massive and challenging area for the Charter. But we should not shrink from the task of bringing down quite big and complex technical ideas into simple to understand concepts that can inform users' evaluation of their evidence. The end user needs to be reassured that the analyst has constantly 'toggled' between the initial emerging picture and each successive piece of evidence that became available. The data user needs to know that the analyst has not simply selectively looked for evidence that supports a prior theory, but instead has gone through a rigorous iterative process.

- Has this study, in essence, has confirmed our initial thinking? (If so, what extra thinking fresh ideas and techniques have been applied to challenge this original viewpoint to reassure us that this is indeed the true position?) Or has this study produced completely fresh insights on the problem? (if so, what 'checks and balances' have been put in place to ensure that these new observations truly reflect what is really going on in the market place?)

To what level of technical excellence were the key techniques executed?

Building on this, there is then the issue of the level of technical excellence that was applied to the analysis, for instance, establishing that the most appropriate stats test has been applied, and so on. This line of enquiry is tricky because this is very much the domain of the market research specialist. But the Charter should still not shy away from designing some questions that will focus decision-makers on the key principles, while also alerting them as to when to draw in experts to evaluate critical technicalities.

- How many times has the (name methodology/ technique employed on this particular study) been employed by the research team in the past, and what observations would the research team make about the past track record of success and failure of this particular technique when applied to this type of decision? What is the biggest potential vulnerability of this technique? Is there one particular feature of this approach/technique that can lead us astray?

9. WHAT LEVEL OF 'BUSINESS CONCEPTUALISATION' HAS BEEN BROUGHT TO THE PRESENTATION OF THE CONSUMER EVIDENCE?

It is important for today's marketing intelligence industry to bring their consumer evidence 'alive' for the decision-maker by presenting their evidence in the context of appropriate business frameworks and models. Such 'conceptualisations' gives consumer evidence more meaning for a senior decision-making audience. Here the Charter could serve to encourage decision-makers to 'demand' from their data supplier that their consumer evidence has been set in the right business context.

- The key concept principle underpinning this project is (name). Has any member of the research team been onto Google and pinpointed all of the writers / 'pundits' (from the business and academic communities) who have prepared models, frameworks or schemas that help explain how this particular phenomena 'works'. And what were the key lessons learnt – how does this add power to our understanding of the current consumer research evidence?

What degree of 'creative stretch', and leading edge thinking, has been applied to the literal consumer evidence?

Extending the above point there is the issue of the degree of 'creative stretch', and leading edge

thinking, that was applied to the original evidence. Increasingly, it is expected that market researchers will get underneath the 'literal' consumer evidence and make some form of 'creative leap' in a bid to pinpoint fresh insights. Today there is an expectation that market researchers will go beyond the respondent's world by looking at parallel markets, and by applying various creative techniques, in order to get a wider understanding of what the immediate consumer evidence is really telling us. Therefore the Charter needs to include questions that will reassure the decision-maker that the interpretation of their evidence has benefited from wider, creative, 'off-the-wall' contextual thinking. This needs to be done alongside providing reassurances that sufficient caution and prudence has also been exercised in 'stretching' the data in this way.

- Have different 'types' of critical and creative thinking been applied to the analysis? That is, have the facts been verified? Has the right level of critique/critical thinking been applied? Have all of the feelings, hunches and emotions been drawn out from the facts? Have all the implications that flow from these facts and insights been explored? Have all of the creative possibilities, alternatives, new angles, perspectives, concepts, perceptions and lateral thinking been applied? And, has the right balance between all of these different types of 'cautionary' and 'creative' thinking been brought to bear in a balanced way in arriving at the final recommendation? What 'analytical framework' did you deploy to achieve the appropriate balance between rigour and creativity?

10. HOW WELL HAS ALL THE AVAILABLE EVIDENCE BEEN INTEGRATED INTO AN IMPACTFUL COMPELLING STORY, AND HAVE THE OUTCOMES OF THE STUDY BEEN PRESENTED IN A WAY THAT WILL INFLUENCE THE DECISION-MAKING AUDIENCE?

The market research industry has made great strides with regard to the quality of its presentations.

Gone are the days when market researchers could be accused of giving uninspiring, dry, boring, tedious, data-laden presentations. Today market researchers can be proud of the energy, enthusiasm and flair that they bring to most of their presentation. The industry has moved on from the days when it just analysed isolated, solitary datasets, and only focused on what was 'pure' valid and reliable evidence. Today we are much better at building arguments from multiple sources of both orthodox, and more 'imperfect' evidence. We are becoming skilled at weaving together different hues evidence to find creative solutions to business problems. But the bar keeps getting raised. Thus it is now expected that market researchers will go beyond the skills needed to give a good presentation. It is now also expected that they will focus on their part in the ultimate goal of explaining how the research evidence can successfully impact on the bottom-line profitability of the client company. So the Charter will need questions to help the data user reassure themselves that everything possible has been done by the supplier to constructively 'impact' on the decision-making process.

- Has the research presentation been presented (on a dry run basis) to a 'Devil's Advocate' who has been instructed to a) 'test' the robustness of each critical piece of the evidence to 'destruction', and b) pinpoint what alternative interpretations of different pieces of vitally sensitive consumer evidence mean for the likely profitability of the venture under the spotlight?

11. TO WHAT EXTENT HAS THE DATA BEEN PRESENTED IN THE CONTEXT OF WHAT WE KNOW ABOUT THIS GENRE OF EVIDENCE-BASED DECISIONS?

Today it is generally accepted that suppliers of market research data need (when appropriate) to extend their role to that of a 'decision facilitator'. Decision-takers now expect to be guided through

the potential decision-making 'minefields' they face. Specifically the end users of our data are entitled to expect that the supplier of their data has alerted them to the typical errors that may be made with this type of evidence-based decision-making. So, suppliers need to go beyond simply making recommendations based on their research findings and take personal responsibility for making sure their evidence is actually being utilised in an informed way.

- What has the research team unearthed about this type of evidence based marketing decision? What are the typical traps that individuals / organisations fall into when using this kind of evidence to make this kind of decision? What are the top three lessons we have learnt over the years when applying this type of evidence to this type of decision?

How well has the end decision been 'framed' according to the personality and 'style' of the end decision-maker?

Developing the decision-facilitation point still further, a CEO once said, 'Once I have got a feel for the choices, making the decision is straightforward'. So this brings us on to the way the research to be used for a decision has been 'framed' by the supplier for the end decision-maker. Has the agency - given what we know about the personality, style and methodological predilections of the decision-maker - structured the evidence and arguments in the best possible way to facilitate an intelligent and informed decision? Specifically, this 'framing' involves making sure that the decision-maker is clear about: the 'safety' of each piece of evidence that impacts on their decision; aware of the precise implications of interpreting a piece of evidence in a particular way; and is told about the overall successful track record of this genre of consumer evidence being used in this decision scenario.

- Thinking about this decision, what are the three top pieces of evidence that most suggest that we should

go ahead with this venture? And what are the top three pieces of evidence that suggest we should not go ahead, or proceed cautiously, or rethink the project? In which one piece of evidence do we most believe? If it was the research team's own money that was about to be invested in this project, what reliance would the team place on the consumer evidence (what would your score be out of 10, using a scale where 10 is 'total belief' in the research evidence and 1 means you are extremely unsure about how much reliance to place on the meaning of the research evidence)?

12. HAS THE TACTICAL FEEDBACK FROM THE LATEST RESEARCH STUDY ON THIS TOPIC BEEN INCORPORATED INTO A WIDER 'META-ANALYSIS' IN ORDER TO IDENTIFY ANY OVERARCHING STRATEGIC TRENDS?

It is important for the decision-maker to be aware of the power of bringing together - in the form of a 'meta' analysis - lots of different tactical insights to see whether, when taken in the round, this wider contextual appreciation of the issue improves the richness of our understanding and/or unearths a bigger overarching trend, concept or insight. So the Charter will need questions that will encourage the decision-maker to demand that this wider contextualisation of what we know already about this issue is carried out.

- Has the evidence from this particular study been related to other studies conducted over the last six months by the agency/client company on this same market/product category/brand? What overall lessons have been learned from this 'meta analysis'? What does this add or change to what we already knew from just looking at our (one) latest piece of survey evidence?