

Knowing what you want

How clear research objectives can lead a project to success

A variety of problems can, and most likely will, occur when research objectives are not explicitly stated at the beginning of the project or are forgotten during the research process. So, the very first thing a marketing researcher should do is work with the client to identify and specify research objectives. Research objectives are statements generally describing the types and categories of information you want to obtain, from what target population and an explanation of the comparisons you want to make. As the project progresses through its stages, the research objectives guide and inform the project team.

Exploring or measuring. Research objectives need to specify whether you want to explore or to measure. Exploration leads to qualitative methodologies such as focus groups or in-depth interviews. If you know nothing about the market, it is important to explore it and obtain ideas before proceeding to a quantified measurement phase. A measurement objective leads to quantitative research methods yielding numerical data. When measurement is your objective, you need to specify what you want to measure. If a company is going to make a large, expensive or risky decision, it is particularly important to quantify market data for the purpose of minimizing the risk.

Categories of data. Research objectives are summary statements describing the categories of data you want to obtain. Market research objectives might include learning about buyer behaviors, attitudes, brand awareness, brand image, product satisfaction, product likes and dislikes, good and bad experiences, likelihood to consider, likelihood to purchase and so forth. In each case, these objectives need to be tailored to the specific project.

Definition of the target population. Research objectives need to be tied to one or more target populations. A target population must be able to provide the data you want.

For example, you can't ask technical questions to respondents who don't understand the technical jargon. You can't ask people to talk about their experience with a product if they have no experience in that category.

Comparisons. Often researchers want to compare segments of the population to each other or measure year-to-year changes.

Triggered that need

Research objectives are not invented out of thin air. When you have

snapshot

Defining research objectives at the beginning of a project can serve as a guiding light throughout the research process and help ensure that client needs are satisfied by asking the right questions to the right people the right way.



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a need for market research, some marketing, business, strategy or communications problem or objective has triggered that need. When you conduct research, you should know how the findings will eventually be used, particularly if a decision is going to be made or an action taken based on the findings.

For example, a marketing objective might be to sell more of your product. You could conduct research among three target populations: 1) your customers, 2) customers of competing brands, and 3) people who potentially need your product.

Customer research. Your research objectives for customers would be to find out how they are using your product; what would motivate them to use more of your product; what other brands they are using; problems or dissatisfactions they might have with your brand; and other obstacles to more frequent usage.

Here is a simple example: A company produced and sold a unique over-the-counter health product that people used orally in liquid form. Sales had been declining over the past couple of years. A research project was designed with the objectives of learning the reasons for the decline and how to increase sales. By conducting interviews with customers, the company learned that customers did not like the taste of the product and used it less than they needed it. The solution was to reformulate the product so it would taste better. As a result, sales increased.

Users of competing brands. Research objectives for users of competing brands would be to seek to discover their opinions of that brand; what they like and dislike about that brand; dissatisfactions or problems they have with that brand; perceptions of your brand; and what would motivate them to try your brand.

For both sets of respondents, you could find out how they use the product and whether they have additional needs.

Potential users of your product. You could hypothesize a target population with a potential or latent need for your product. (They need it but they don't yet know it.) Your research objective would be to identify the

problems or needs that population is having for which your product provides a solution. Another objective could be to test your product concept to get respondents' opinions, likes and dislikes and likelihood to purchase.

Other sources of research objectives

Other starting points for market research might be the information needs for a strategic plan; an investment or acquisition; a new product launch; a new delivery or communication channel; or some other major company decision.

A review of published market research studies can assist you in defining appropriate research objectives. For example, a company wanted to measure employees' satisfaction with its communication program. From published research, they learned that other companies were measuring employees' trust in communications, a key element in defining satisfaction. Trust was then considered as an option for an additional research objective.

Limiting and prioritizing research objectives

How many research objectives is the right number? Time limits the number of questions that can be included in a focus group or an individual interview. If an interview is too long, respondents will become fatigued, rush through their responses and/or terminate early. In a focus group, time may run out before you have covered all topics. Unless you are going to pay an enormous incentive to get participants to answer a huge questionnaire, you need to limit your questions. In order to do that, you need to prioritize your objectives. Those that are less important may need to be omitted.

However, if you have a lot of important objectives - too many for one questionnaire - an option is to split your sample randomly and conduct two research projects, each with a different set of objectives and a shorter questionnaire. Assuming the split samples have the same characteristics, you should meet all your research objectives.

Exploring or measuring

Are you trying to explore a topic or

are you trying to measure something? The best approach is to explore first and then measure. You can miss a lot of information if you skip the exploratory stage. In many instances where exploratory research was skipped, the questionnaire for the measurement phase neglected to ask the most important questions. In addition, the multiple response choices did not include some of the most important answers.

As an example, a company had just installed an employee software platform and wanted to measure employee satisfaction with it. The IT managers were about to jump in and ask people how satisfied they were with different elements of the software and postpone asking any questions about training and support. Luckily the marketing research team was able to persuade the IT managers to conduct some exploratory in-depth interviews first.

Findings from these exploratory interviews showed that training and support were primary concerns. The quantitative research phase was then designed to measure satisfaction with those two elements and to uncover any suggestions for improvement. Eventually, the findings led to greatly improved levels of support and more tailored training methods for segments of the employee population.

Target population and recruiting

The recruiting of eligible and appropriate respondents should be based on the research objectives. Depending on the objectives, respondents may need to have prior knowledge or experience to enable them to voice an opinion. For example, if you want to find out details about customers' complaints, don't ask the CEO, ask the call-center staff. The CEO will know about the customers' complaints only when they reach high levels of magnitude.

In many cases, it is necessary to hypothesize the definition of the most appropriate audience, especially for the exploratory phase of the research. A company was considering offering an assistance plan that helps people find medical resources, legal resources, alternative transportation, hotels and even burial assistance or transportation

of a deceased person. The product manager neglected to think about who would be the most likely type of person who would be interested in this service and did not specify requirements to the recruiter. It turned out that none of the participants recruited were travelers, visitors or newcomers; they had never left their hometown. They were totally bored with the ideas and couldn't see why they wouldn't just ask their family and friends for advice.

Another organization wanted research as input to its strategic plan, one element of which was to include how to win against its competitors. Unfortunately, the project manager neglected to specify that some of the participants in the research should either currently use or previously have used a competitor's brand - not just the client's brand. It turned out that the list source contained no one who used or had used a competitor's brand and therefore researchers were unable to obtain any data on opinions about competitors.

Methodology for comparisons

If you plan to compare current data to a previous year's data, you need to collect the data in a consistent manner. For example, if you have been using a telephone survey, you need to continue the telephone survey method. Many marketing researchers are switching to online methods. A switch in data collection method can be accomplished as a test, simultaneously with the original method. In that way, you will accomplish the objective of correct comparison, while at the same time testing the new method for future comparisons.

If you plan to make a comparison of current data with the previous year's data, you also need to use the same questionnaire as the previous year, although new questions can also be added.

Writing questions to meet research objectives

Questions should be written to meet the research objectives. I

have seen questionnaires with questions in them that did not seem to meet any of the research objectives, and conversely I have seen questionnaires where there were no questions at all for certain objectives. Either way, you have a problem. This mismatch is common, especially when a questionnaire is heavily edited by multiple people within an organization.

The easiest way to ensure you do not have a mismatch is to head each series of questions with the appropriate research objective. Don't remove the research objectives from the final questionnaire; they will assist the moderators or interviewers in focusing their questioning appropriately.

For example, if a key objective is to obtain competitor information, have a section titled "Competitor Information." Ask respondents which competitors they have heard of; which ones they use; what they think of them; how satisfied they are with them; and so on. Of course, if you have not properly recruited respondents who can answer these questions, you will not have data to meet that objective.

Lately, it seems that clients want longer questionnaires and shorter reports. By focusing on the research objectives, questionnaires and reports can be better aligned.

Choosing a moderator or interviewer

A moderator or interviewer needs to be matched to the type of data collection and type of respondent. For a relatively simple structured questionnaire administered by telephone, the requirements may be a good speaking voice, ability to read and some basic interviewing training. For specialized populations such as business or technical respondents, particularly in qualitative research, a moderator or interviewer who sounds knowledgeable about the subject matter will be able to obtain more information from the respondents by probing intelligently. The research findings will be richer as a result.

Analysis plan

The analysis plan should be based on the research objectives. For a quantitative study, tabulating everything by everything is a common procedure but unnecessary. Using the research objectives, you can think ahead about what kinds of tabulations and other analysis you will need. You should write the analysis plan prior to finalizing the questionnaire. You may find that you have neglected to ask a certain question that would provide useful data to analyze and you still have time to add it to the questionnaire.

Writing the report to meet objectives

The easiest way to write the report is to list the objectives and then take each one and write to that objective. Pretend you are writing a college exam with an open book. Write what you think you have found and then go back to check the data. I have seen reports with lots of data, but at the end you did not know if the research objectives were met because the objectives were not the focus of the report. A reader should not have to work too hard to obtain the necessary answers.

Whether your report is written in traditional style or presentation format, it is important to include the research objectives, description of the respondents and methodology. Keep in mind that some clients keep reports on file for a long time and eventually other people in the company may use them, so each report needs to be self-explanatory and self-contained.

A continuous cycle

If research objectives are defined correctly in the beginning and threaded through all elements of the research project, then at the end of the project, you will have useful findings that meet the research objectives. Market research is a continuous cycle; findings from each research project can be used to inform the research objectives for subsequent projects. | Q