

••• research careers

Living up to the name

From 'marketing researcher' to 'insights professional'

| By Carol Shea



snapshot

The author draws from an industry study to propose five behaviors that will help researchers evolve with the needs of their end clients.

While many corporate marketing research professionals have begun referring to themselves and their industry using the term “insights” (or, at the very least, they have increased their emphasis on delivering insights and not just data), a Boston Consulting Group study found that business leadership doesn’t think that their insights personnel understand business issues. Further, these leaders think their researchers don’t consistently answer the “so what” about the data they provide and don’t translate research results into actionable business recommendations.

In addition, the 2016 Quirk’s Corporate Researcher Report identified the pain points and challenges facing client-side insights professionals. The three top issues were: “too many projects for our staff,” “too many projects for our budget” and, most critically, “not being able to get insights acted on.” Research results not being acted on is an incredible waste of resources that torpedoes ROI in an environment where budget and staffing is already tight.

These critical problems require us to rethink not just what we call ourselves and the industry but how we conceptualize our roles and our departments in order to increase the value of the insights function and protect budgets. This article provides background into why these problems exist and share our vision for addressing them.

Critical pivot point

A quick historical recap of the marketing research profession identifies how we reached this critical pivot point.

Era 1: Pioneer era – 1900 to 1950

The birth of the marketing research field began at the turn of the 20th century with pioneers like George Gallup and Elmo Roper bringing door-to-door survey research methods to connect marketers to consumers.

Era 2: Survey era – 1950 to early 2000s

This era brought scientific rigor in sampling and new analytical techniques. Phone became the mainstream way to reach consumers and online research and qualitative research were born. The



quirks.com/articles/2017/20170808.aspx

marketing research function within companies became well established and grew.

Throughout these first two eras, marketing research's role was to answer questions as they arose within the organization: How should we price this product? Are consumers satisfied with our service? Why is the competition growing while we are not?

Thus, the management of the research function was largely focused on the management of research projects to answer these questions. Research directors sought to optimize each phase of the process: designing, conducting, analyzing and presenting research studies. They sought better analytical (e.g., multivariate methods), consumer connection (from door-to-door to online) and logistical (e.g., sampling, field recruiting) techniques.

Overall, the research function's role was to deliver knowledge to management.

Era 3: Insights era – 2010 to now

Rapid technological and societal change bring us closer to the consumer than ever with online panels, mobile and social research techniques. Studies that used to take months in Era 2 now take weeks. Simultaneously, the growing recognition of the importance of and the ability to collect and analyze large consumer behavioral data begins to overshadow our reliance on traditional research techniques. Big data is the "knight in shining armor" for many companies and corporate research departments have shrunk.

In Era 3, management still needs questions answered but they have new partners and tools to provide insights. They are awash in information and frustrated that they don't often enough understand the "so what" about the data nor receive actionable business recommendations.

The expectation about the research department deliverable has changed. Knowledge is no longer enough. Management expects insights departments to recommend actions as well.

Yet, the management of the marketing research function is still research study-focused and based on methods created during the first two eras where our management role was best described as project direction.

Profession has made strides

It's important to note that in the last decade or so the insights profession has made strides in becoming strategic, con-

sultative partners with business clients versus simply project managers. Some of the positive trends include:

- In the early 2000s, researchers recognized the need to be more strategic and consultative. Industry articles envisioned researchers as knowledge curators, moving from reporting results to pulling together insights from many sources to create a well-rounded understanding of consumers that our clients require. Corporate marketing research departments and job descriptions started changing their names to include "insights."
- However, it wasn't until about 2010 that the term insights became the mainstream way to refer to our field. In that year, Forrester Research industry predictions began referring to the marketing research function as the insights function. The American Marketing Association changed *Marketing Research* magazine to *Insights* magazine in 2013 and the Marketing Research Association/CASRO merger has brought us the new Insights Association.

Having conducted over 30 in-depth interviews with senior insights leaders from a wide variety of Fortune 500 corporate teams in CPG, health care, finance, technology, services and others, our firm, InsightsCentral, learned that throughout this last decade, many researchers have successfully elevated their organizational roles to strategic insights partners. They have done so based on years of experience with a wide variety of management challenges, multiple research methods and great mentorship. These insights leaders shared their proven techniques for building strategic skills among their staff and they tended to fall into three camps – as exemplified in these quotes:

- The first quote emphasizes understanding and aligning with the business drivers – *"Prioritization and focus on key business questions by partnering with stakeholders before, during and after research to create alignment on approach, insights and recommendations."*
- The second quote emphasizes the need to synthesize data and not be overly primary research focused to the exclusion of other techniques. It's not either/or it's AND. *"We have an emphasis on integrated analysis, going past the primary*

data and drawing on other sources of information in our analyses."

- The third quote emphasizes a theme of hiring the right talent – *"If you hire based on strategic thinking and curiosity, the rest should take care of itself."* While we agree that you need baseline talents and motivations to succeed in any job, we shouldn't undervalue the human capacity to learn, which this third philosophy appears to do.

While these techniques work to slowly build strategic and consultative insights departments, they do not work fast enough for a profession facing the problems and pressures identified at the start of this article. Lean (staff and budget) insights departments mean that leadership doesn't have much time to mentor and quickly build these skills among new researchers and company management is not patient.

Too many insights departments are still functioning with an Era 2 mind-set. New researchers are well trained in research methods but lack an understanding of how to be strategic and consultative.

Of course, it is essential to effectively manage projects, but how can one be strategic when the primary goal is moving from one phase of a study to another? There is no clear and comprehensive development path for moving an Era 2 project management-focused research department to an Era 3 consultative, strategically-focused insights department.

New model needed

A new management model for strategic skills-building is needed to help directors train staff and help individual researchers build these new skills more quickly. So, our firm's team collaborated with sharp-minded, big-thinking insights and marketing professionals from successful Fortune 500 companies to define the specific skills and behaviors required for insights professionals to be more consultative and strategic as is required in Era 3.

To validate the specific behaviors and skills identified through our qualitative process, we designed and fielded a validation study in partnership with the Insights Association. Over 300 corporate insights professionals, the majority of whom were in management, participated in the study in 2016.

First, we asked all 300-plus corporate insights professionals the importance of

Figure 1: The Era 3 Model

Behaviors		Skill Qualities
	EXPLORE – Brings an “open-eyes” approach to the hypothesis and discovery process, allowing insights professionals and those around us to find new approaches, opportunities and solutions.	<ul style="list-style-type: none"> • Perpetually curious vision. • Eyes-wide-open attitude.
	REFINE – More keenly apply critical thinking skills to sharply focus on a stakeholder strategy that profitably attunes to the business’s marketplace conditions.	<ul style="list-style-type: none"> • Think globally, act locally. • Follow-the-money focus. • Less-is-more discipline. • Knowledge-is-power perspective. • Start with the end in mind.
	ALIGN – Intertwine multiple stakeholder perspectives to improve the quality of and confidence in your end results as well as establish you as a full team partner.	<ul style="list-style-type: none"> • Define your position on the team. • Incorporate all internal considerations. • Create reasons to believe.
	HARVEST – Express and elevate the customer and marketplace voice in the decision-making process to influence the business ecosystem.	<ul style="list-style-type: none"> • Ensure that insights are absorbed. • Elevate insights so that they are used in decisions.
	EVALUATE – Evaluate your work. Be accountable for using the right methods, prioritize learnings and company needs and comply with your company’s existing standard of performance measurements, their KPI’s, to ensure you can prove and increase your value to the company.	<ul style="list-style-type: none"> • Don’t bring a knife to a gun fight. • Avoid penny-wise, pound-foolish. • New tools should increase effectiveness. • Uphold a visionary perspective. • Maintain a “What is important now?” focus. • Grow from within while expecting change. • Help steer the ship to customer-friendly waters. • Help decision-makers be more resource efficient.

being strategic. After all, we had assumed this to be the case from the large amount of secondary and qualitative research we conducted but we wanted to ensure we weren’t overstating the need. Based on the response, there isn’t any overstatement. Every participant, all 100 percent of the insights professionals, agreed that being more strategic was important to the profession (when was the last time you saw 100 percent in ANY result?).

In addition, nine out of 10 respondents agreed that improving strategic skills is important. But how can that happen more quickly?

Even with the methods described in the quoted statements above, corporate research professionals told us that improving the strategic skills of researchers is a tough job, as evidenced by the agreement levels to these statements:

Improving researcher/insights personnel strategic skill performance is challenging: 73 percent

Your current methods for developing researcher/insights professional actionable strategic skills are NOT adequate: 61 percent

Your organization does NOT provide the support (e.g., time, budget, resources) to build and apply strategic thinking skills: 48 percent

In essence, many professionals agree that we don’t have the support

or techniques in place to rapidly build these skills. InsightsCentral contends that one fundamental barrier is a lack of clarity around the definition and expectations of performing strategically. The professional literature describes qualities such as being “consultative,” “proactive” and “better storytellers” as contributing to strategic skills. However, these vague qualities make it difficult for insights leaders to improve the strategic abilities of their staff.

Our team concluded that a better definition of Era 3 strategic skills and a path for building strategic skills that will move all insights professionals firmly into that era were critically needed. Therefore, based on the results of our qualitative and quantitative research, we developed the Era 3 model for managers to use to develop their staff and individuals to use to improve their skills.

The Era 3 model (Figure 1) is composed of five primary behaviors and over 150 specific skills and competencies. The five behaviors are defined as shown in the chart, along with the skill qualities that would be exhibited by a strategic, consultative insights professional.

In the last decade, the insights profession has made some progress from being viewed as project managers to consultative partners. But, as indicated by the

facts shared at the start of this article and the results of our own analysis, there is a long way to go for us to live up to the name of “insights professionals.” Too many executives have low confidence in marketing insights and don’t consistently act on our deliverables. While it’s true that business leaders and the insights team need to align on business objectives and how best to use research learnings, the onus is on insights professionals to make that happen or we’ll continue to see our departments and budgets cut.

As an industry, we need to develop new ways of speeding up the strategic skills development of insights professionals and shift how the organization views the department’s role towards being a strategic partner.

Management models that incorporate structured processes and job aids, such as the balanced business scorecard, the BCG Matrix and Deming’s PDSA cycle, are established tools that shape the way we think, manage and run our organizations. The Era 3 model likewise provides a framework for working smart as insights professionals by: defining best-in-class strategic skills so that insights directors can more objectively assess and develop their team members; and providing individual insights professionals with a blueprint for building their own strategic abilities.

Models, structured processes and job aids can provide the blueprint individuals need to achieve excellence by being more strategic. These types of tools can reduce training time and build sustainable learning by allowing employees to learn more efficiently on-the-job. For insights management, these tools streamline processes and makes delegating easier.

By incorporating new management models, structured processes and job aids that support the ability to be more strategic and consultative in our roles, insights professionals can reduce the risk of research results sitting on a shelf unused and effectively bring the voice of the customer to critical business decisions. ¹

Carol L. Shea is president of InsightsCentral Inc., a Cincinnati marketing technology software provider. She can be reached at 513-321-1261 or at carol@insightscentral.com.

REFERENCES

¹ Amended from *A Nation of Numbers: The Development of Marketing Research in America* by Paul Scipione.