Integrated Insights for Today's Tough Questions

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Quick Introduction

Jessica Lopez

Director of Research and Consumer Insights
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Lead research in North America, while providing insights for our operations team in Switzerland

- Insights professional with 15+ years experience

- 5+ years as a VP on the supplier side

- Regular guest lecturer at University of Southern California

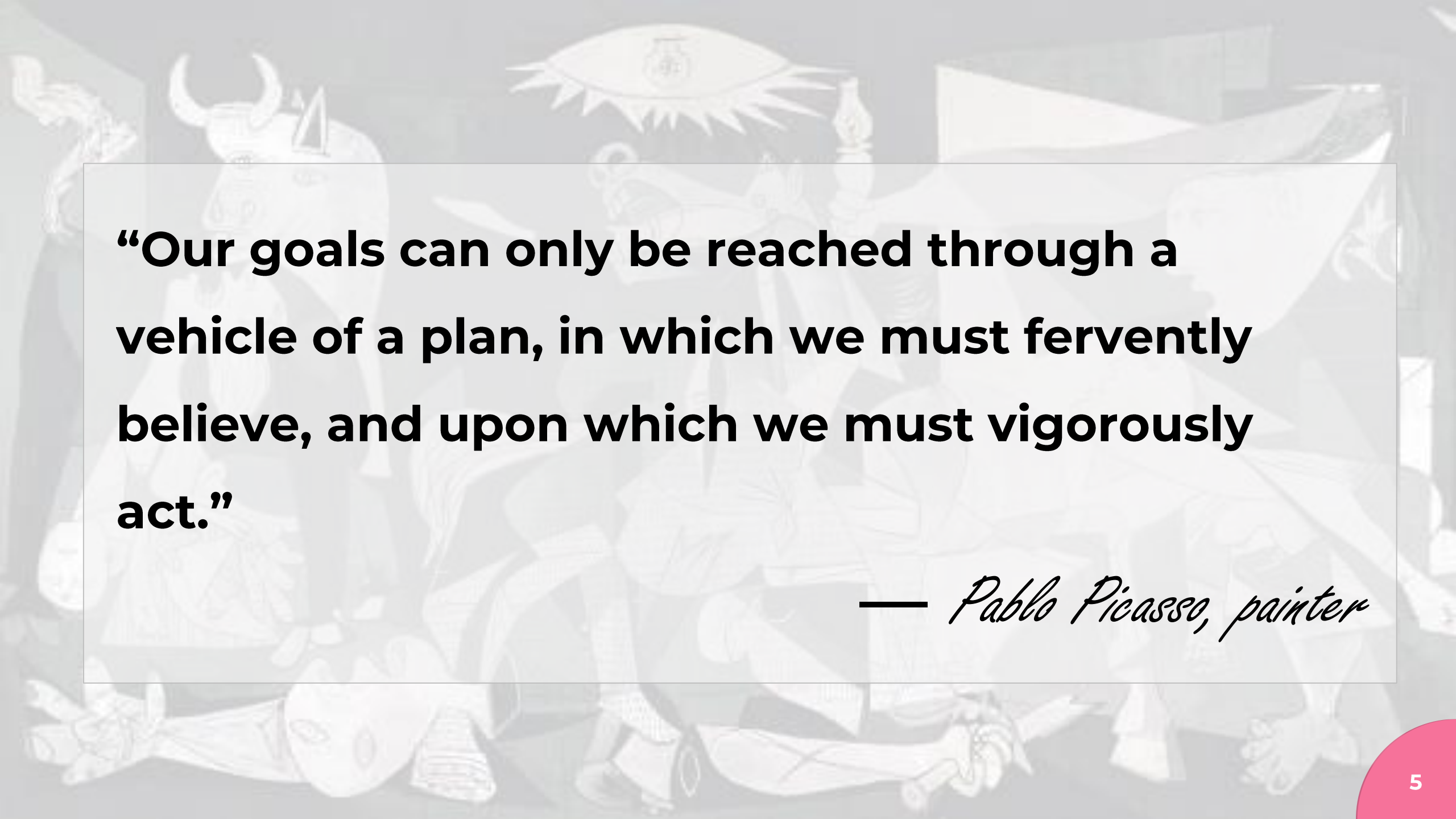- B.S. in Actuarial Science with an M.A. in Public Relations

Overview of Learning Objectives

For major strategic initiatives or long-term initiatives, a robust non-traditional research program design may be needed

- **Plan:** These designs don't have to be expensive, but they do require a detailed and thoughtful approach.

- **Map:** A successful approach will use a tight, yet robust list of questions mapped to the various information sources.

- **People:** A successful approach will involve a broad group of individuals, who contribute in the right ways at the right time.

"Our goals can only be reached through a vehicle of a plan, in which we must fervently believe, and upon which we must vigorously act."

— *Pablo Picasso, painter*
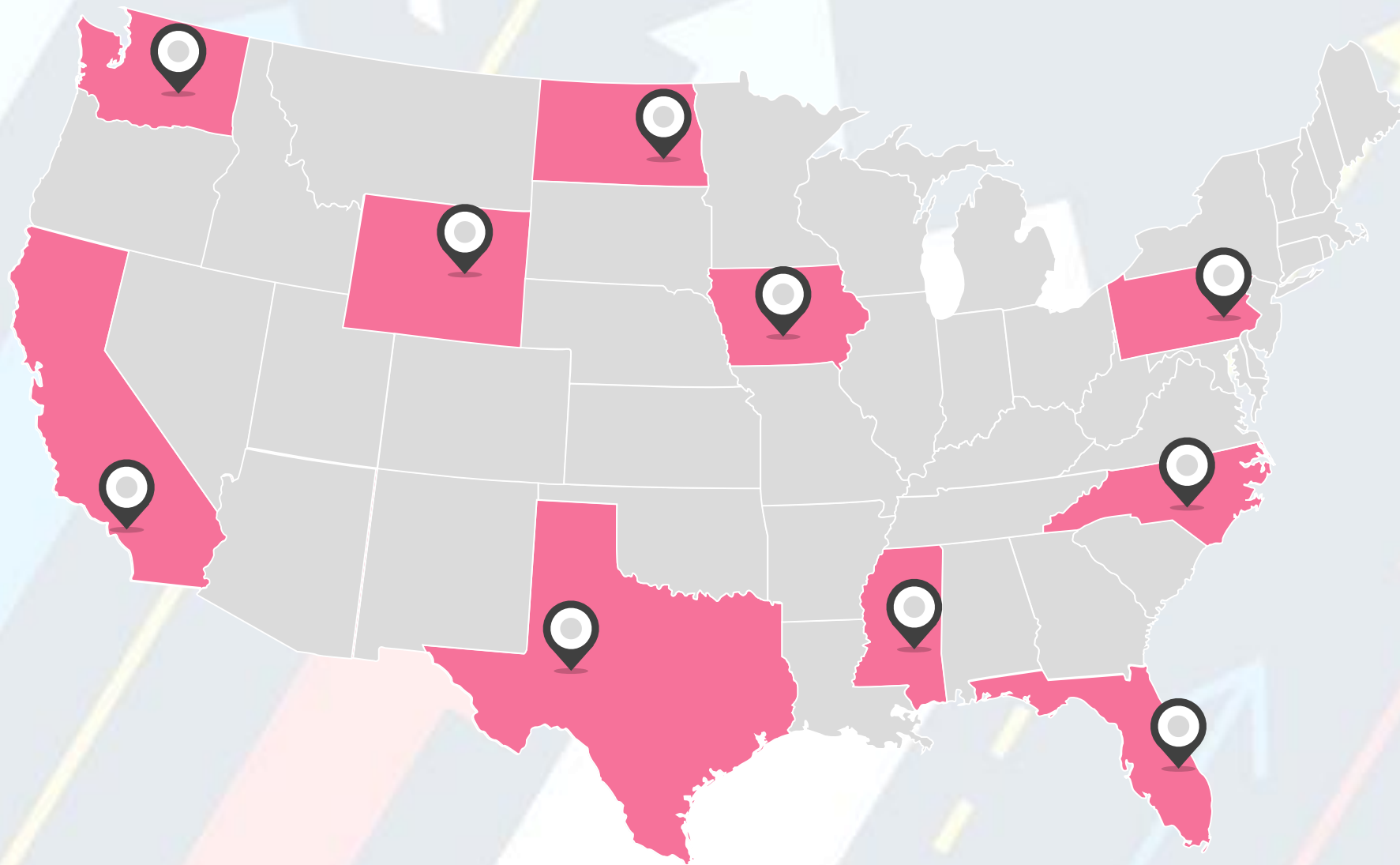
Planning

- Develop a list of key questions and document them

- Convert hypothesis into questions and add them to your list

- Organize and consolidate your list of questions

- Identify information we already have access to – industry publications, syndicated research, trackers and other pieces of research

- Identify knowledgeable people who may also provide insight

Developing a List of Questions

What do <u>you</u> need to know about a market in order to help your company grow?

What do <u>you</u> think will be barriers to growth?
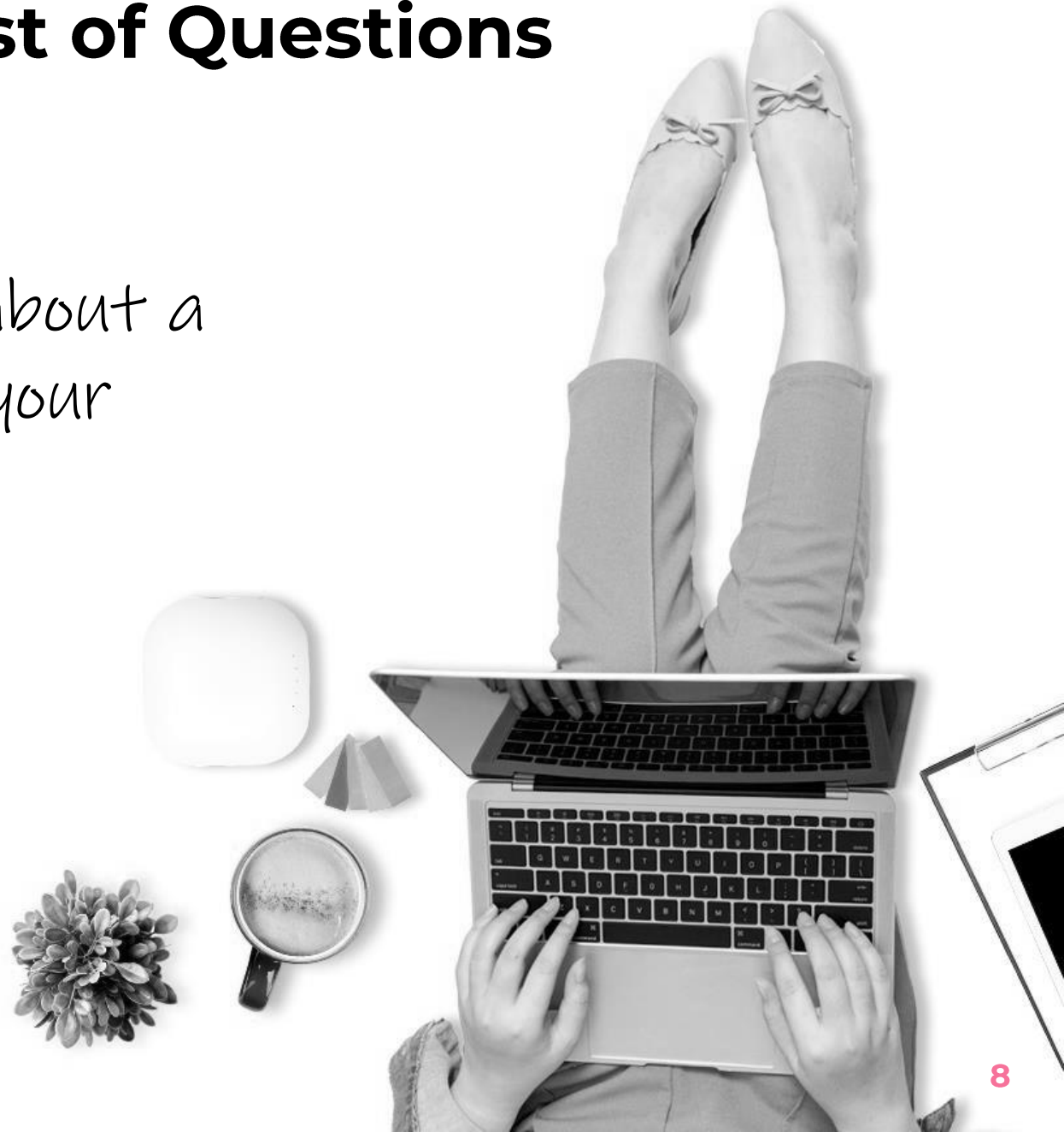
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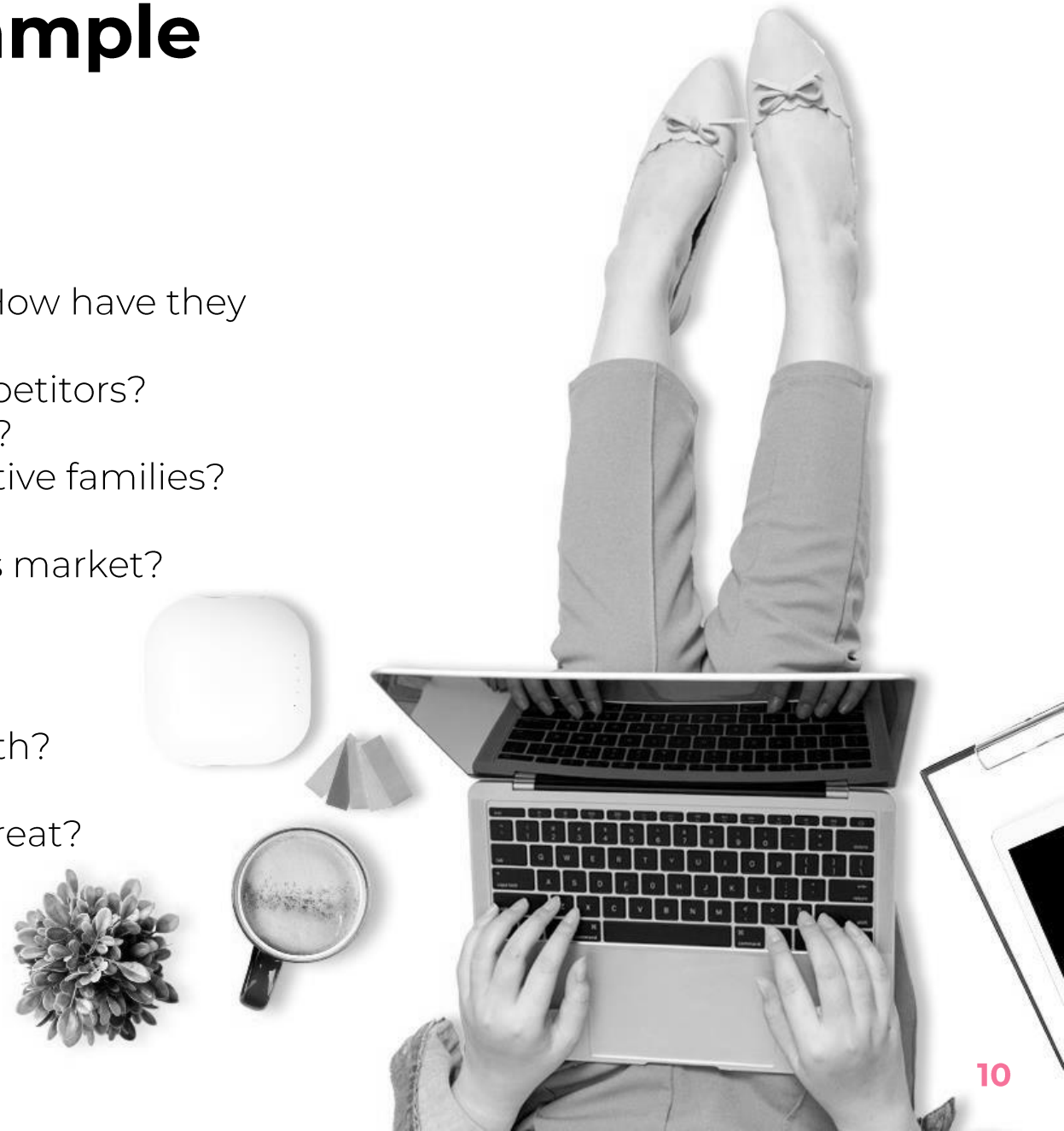
An Example

Questions that apply to all markets:

- What matters to parents in this market?
- Who are the competitors? How are they perceived? How have they positioned themselves?
- What do the brand funnels look like for us vs. our competitors?
- Where do parents in this market get their information?
- What are our strengths? Are those known by prospective families?
- What are our weaknesses? Can we overcome them?
- What if anything do we need to change to grow in this market?

Questions specific to a given market:

- City X: Is our reputation a barrier to growth?
- City X: Is the tenure of our employees a barrier to growth?
- City Y: Is there an issue with our real estate strategy?
- City Y: Does new competitor X present a formidable threat?

Remember

These designs don't have to be
expensive, but they do require a
detailed and thoughtful approach.

An Example

Questions that apply to all markets:

1. What matters to parents in this market?
2. Who are the competitors? How are they perceived? How have they positioned themselves?
3. What do the brand funnels look like for us vs. our competitors?
4. Where do parents in this market get their information?
5. What are our strengths? Are those known by prospective families?
6. What are our weaknesses? Can we overcome them?
7. What if anything do we need to change to grow in this market?

Questions specific to a given market:

8. City X: Is our reputation a barrier to growth?
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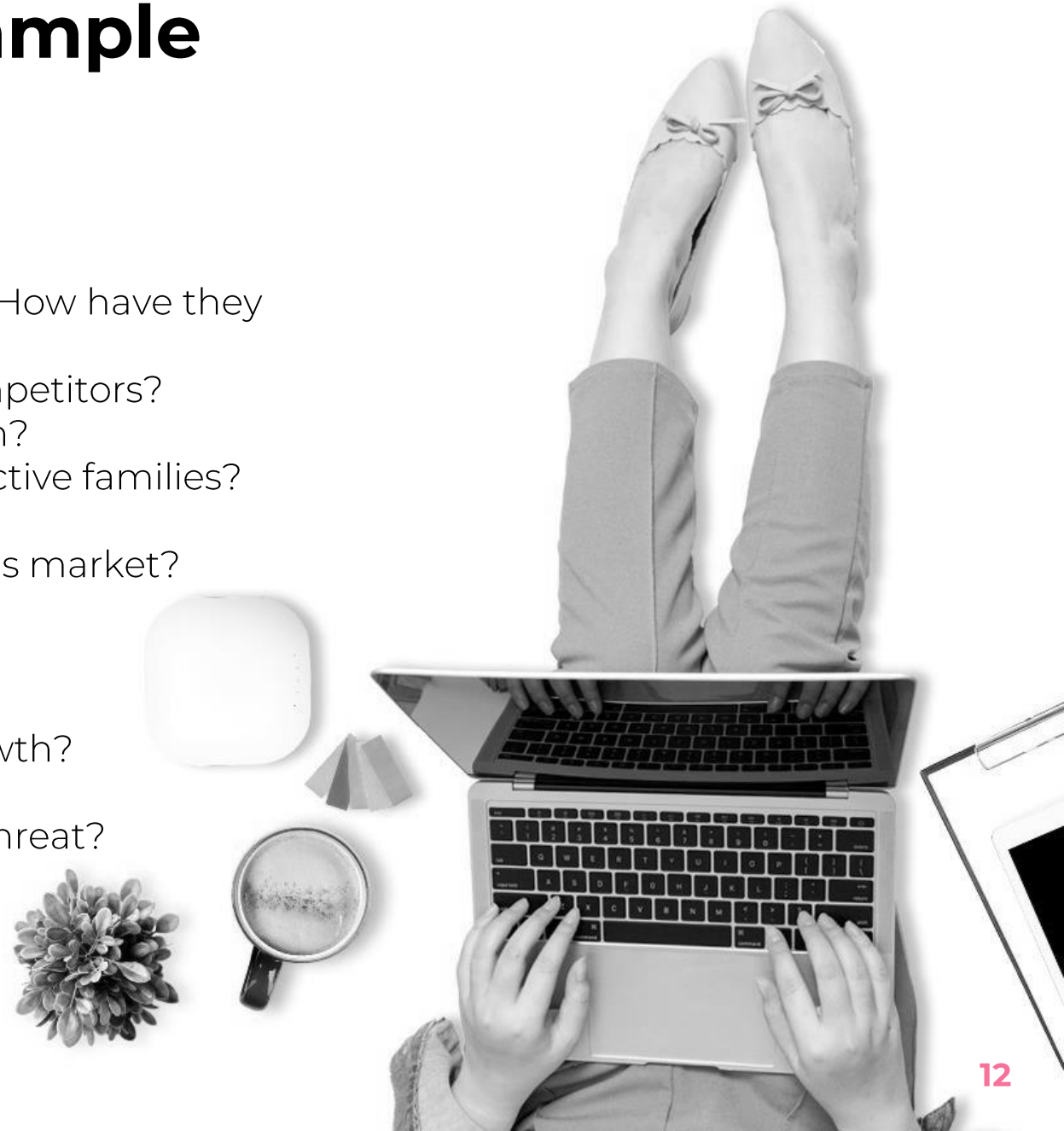
Remember

A successful approach will use a tight, yet robust list of questions mapped to the various information sources.

Mapping

- Create a tight, yet robust list of questions mapped to the various information sources, including knowledgeable people

- Share your research program design map with key stakeholders

- Ask key stakeholders to look at the list of questions one last time

  — Is everything they need to know represented?

  — Has anything changed?

  — Would they tweak any questions?

An Example

#4 Sources of info

Digital Ethnographies w/ quotas at the market level

#1 Drivers of Consideration

Brand Tracker w/ market level augments

#1 What parents are looking for

#2 Identify competitors & initial performance performance

#3 Brand funnel

#5 & 6 performance analysis

Shop-a-Longs w/ quotas at Market level

#4 sources of information

+ Desk Research
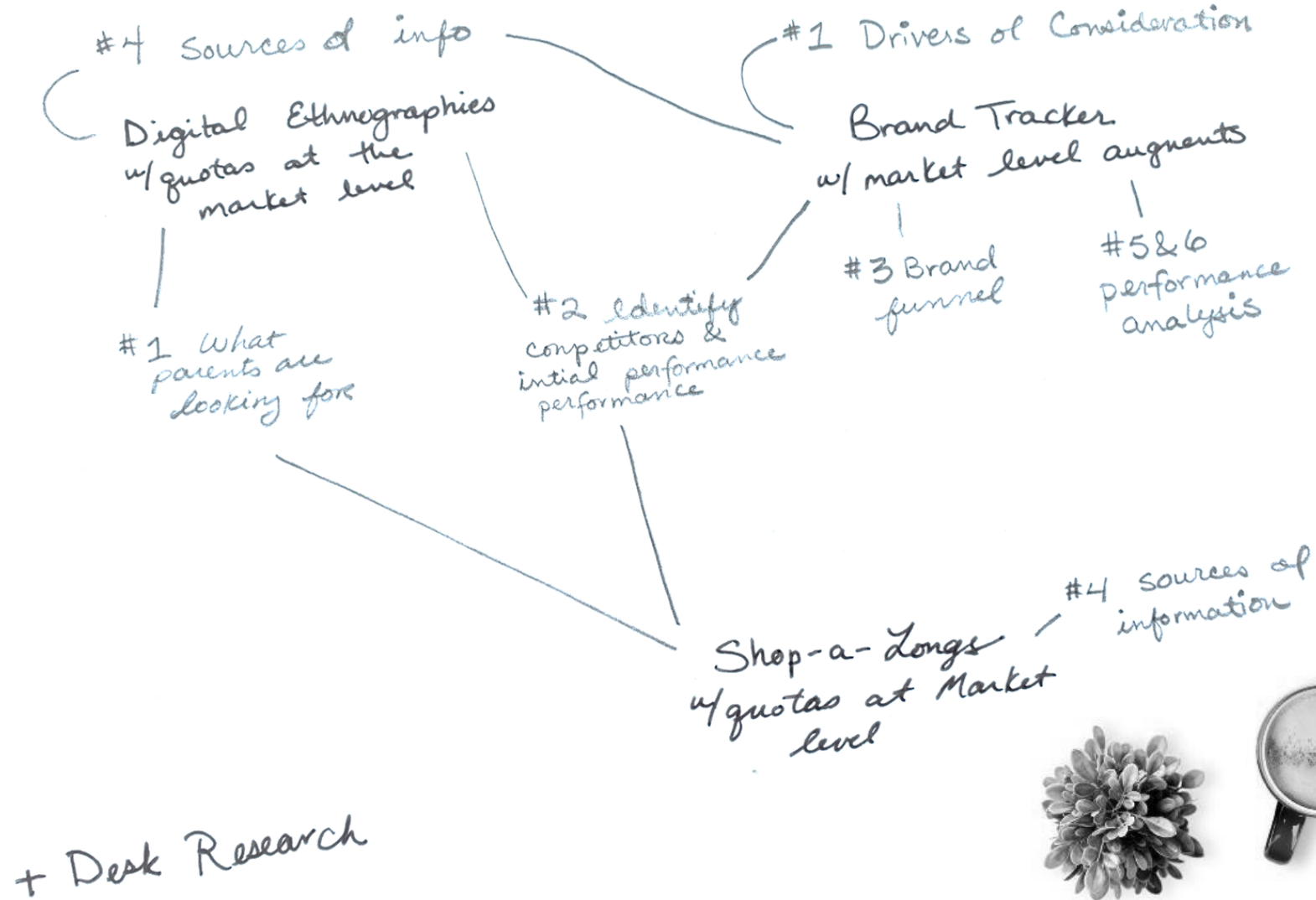
An Example

Approach / Information Sources	Objective
Digital Ethnographies w/ quotas at the market level	#1: What parents are looking for #2: Identify competitors & Initial performance #4: Sources of info
Brand Tracker w/market level augments	#1: Drivers of consideration #2: Evaluate performance across brands #3: Brand Funnel #4: Sources of info #5&6: Performance Analysis
Shop-a-Longs w/quotas at the market level	#1: What parents are looking for #4: Sources of info
Desk Research	Yelp Reviews Competitor websites Market statistics and trends
Annual Employee & Guest Satisfaction Survey	#5&6: Performance Analysis
Regional Directors	
Store hierarchy files	

Market Specific questions should be layered into the Market Specific Map

People

- Gather a robust list of questions and hypotheses from people at the beginning

- Get buy-in from people and input on the mapping

- Consider people as information sources during survey development, analysis and/or bringing the findings to life

"If you can dream it, you can do it."

— Enzo Ferrari; Italian designer

Client-Side

- Share your map with all your partners

- Share the big picture of what you're trying to accomplish

- See if they have any suggestions for enhancement

- Make it clear how their research fits into the plan

Supplier-Side

- You can be the creator of the map

- Take the lead on conversations with as many end-client stakeholders as possible

- Use an honest assessment of what your team can and cannot do

"**Analysis is the art of creation through destruction.**"
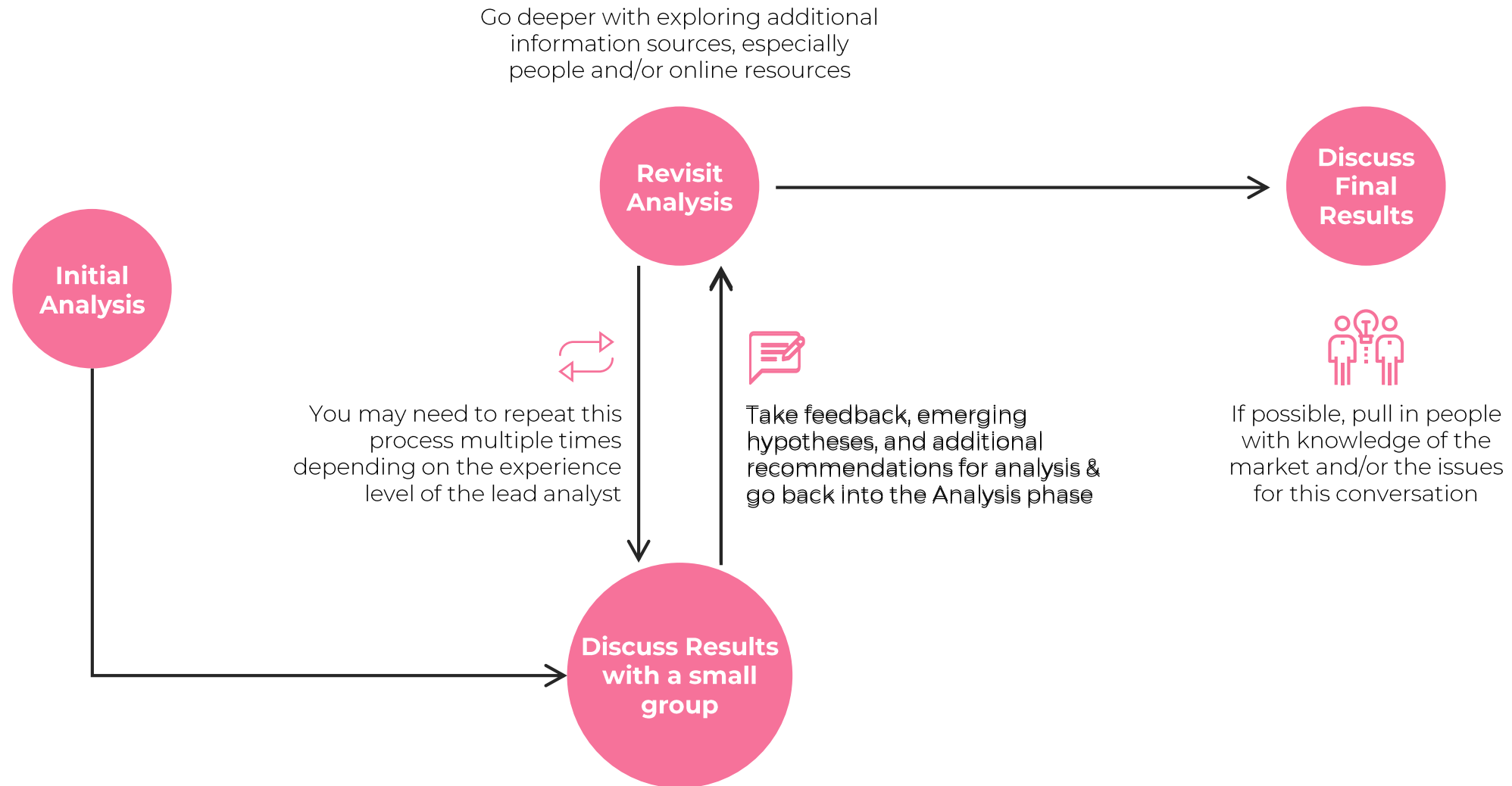
— *P.S. Baber, Author*

Analysis

This phase…

- is not linear

- Is not easy

- Uses a deconstruction-like approach to analyze the data

- Requires a team approach to story refinement

Analysis

Go deeper with exploring additional information sources, especially people and/or online resources

Initial Analysis

Revisit Analysis

Discuss Final Results

You may need to repeat this process multiple times depending on the experience level of the lead analyst

Take feedback, emerging hypotheses, and additional recommendations for analysis & go back into the Analysis phase

If possible, pull in people with knowledge of the market and/or the issues for this conversation

Discuss Results with a small group

Analysis Tips

- Let your original questions be your guide

- Remember people and online sources of information can be really helpful in developing the story

- **Use the Rule of Three:** It's easiest for people to remember things in groups of threes

- Be mindful of who the results are being communicated to

- Make sure recommendations are clear and practical

Reporting Tips

- Consider whether you can cover everything in a single report or whether there should be separate reports

- Use icons or something to subtly, but clearly indicate where findings are from as you're stitching them together.

- Set up the report flow to clearly align with your executive summary

- Consider creating or delivering "worksheets" with the report where team members who will need to act on the research can brainstorm their potential action steps

- Make sure the share out session is highly interactive

Final Success Tips

- Bring the research to life

- Think about the implications for the end user groups

- Stay focused on the questions and the story

- Avoid sharing results study by study

Thank you!

Please feel free to connect with me on LinkedIn and to reach out any time:

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