AMANDA:

Quick show of hands, how many of you have had 100% of your research recommendations implemented from 100% of your studies? I didn’t think so…
The challenge of keeping research relevant

AMANDA:
As an industry, we all strive to ensure that research remains *relevant* to business decision-making.

It’s easy to get caught up in the logistics of pulling a research project together. As researchers, we know it’s our job to get the research done right, but it can be a struggle to get the people engaged and excited to go on an exploration, particularly the VIPs of the process – the research participants and the stakeholders.

Today’s story is about how Jacki and her team have successfully engaged these VIPs to make research relevant and impactful at Dell. I’ve had the privilege of being along for the ride over the past 5 years.
JACKI:

First, I have to share that one of the most important elements to conduct a successful, impactful research project is to find an agency/partner such as I have found with Amanda - who becomes like an extension to your team.

I have been in research for quite a few years, at Dell for 25 years and part of the Commercial product group for the past six years… I have experienced more challenges with conducting authentic, actionable research in the past three years than at any other period in my career.

Two of the most critical challenge areas relate to acquiring valuable “insights” and ensuring “stakeholder engagement”:

1. Insights
   • Finding the right decision makers, especially IT Decision Makers, has become increasingly hard. How can I trust they are who they say they are (for qual or quant research)? This is the biggest challenge I face and the one I am most passionate about solving.
   • We have “insights” flowing in from different parts of the business, we have different channels or paths for talking with ITDMs and customers that sometimes contradict one another. Research doesn’t always align with what our largest customers are sharing with us.

2. Stakeholder Engagement
   • It takes significant time on the part of our planners to work with me and Amanda to conduct the larger portfolio-level studies we have found to be so impactful.
   • We work closely with our planners to ensure they are able to share with us the key “business decisions” they need to make, not just the more tactical research objectives… we need them to share the most strategic issues/decisions they need to make.
   • We need to ensure confidence that we understand their business and can put ourselves in their shoes (however with an unbiased perspective)... and this helps hold them accountable (level of commitment) and engaged throughout the process.
   • At the end of the day, this helps us arrive at the end of our research journey (once you and I are standing up there) with recommendations they pay attention to and take action on. And that sometimes means we recommend they don’t proceed with designing a new product.
JACKI:
I’d like to share with you how we addressed some of these challenges conducting research for our very important Latitude product line – that we are hoping will help you approach/think about your projects with a fresh perspective..

Our Latitude line of mobile devices includes standard laptops, 360s and detachables designed for the commercial space. Our direct customer is typically the IT Decision Maker but we know it is critical to talk with and learn about the challenges their End Users face as well.

After conducting a combination of quant surveys and focus groups as separate projects, I reached a point where I realized I needed to radically change my approach. Many of you can likely relate to the need to share “numbers” based on large sample sizes to add credibility to your research. However I got to a point where the insights from our online surveys weren’t making intuitive sense and often conflicted with market information. When the decision makers were unable to see/touch/compare our products side by side - we received learnings such as weight didn’t really matter within a half pound range or thinness of the product was not so important either. I knew this wasn’t true! How could I believe these insights? I knew something was wrong… was changing.

The culprits of this challenge varied whether I was conducting a quant or qual project. For quant studies, the two main issues were the inability to show the actual product to ITDMs and End Users and the lack of “authentic” sample, we were often not talking to true IT Decision Makers. For qual studies, the biggest challenge was the smaller base size – and sometimes the limited scope of what we could cover in our already extended 2.5 hour groups.
AMANDA:
In order to evolve, we had to first be bold and throw out the rules.

Jacki is a clever researcher, as the popular British artist Banksy, whose framed mural, “Girl with Balloon” shown here, is a clever artist. He put a shredder inside his art piece. He installed it back in 2006 in case his painting ever sold at auction, and got to execute on it last year. Now, he might have come up with the idea, but he probably needed a little help from his friends to make it happen. He most likely brainstormed different ideas and his team likely had fun experimenting with it until they had their plan dialed in.

We didn’t shred a laptop at Dell, but Jacki knew she needed to try a different approach to get the attention of research stakeholders and research participants. She had an idea in mind, but wanted a thought partner. This is where I and my colleagues entered in.

We were brought in to execute on the research – to design research materials, find the right participants, moderate the sessions and package the insights in a compelling way. Jacki invited us in immediately, sharing everything she knew, and introducing us to her stakeholders so we became a part of her extended team.
JACKI:
In order to get accurate feedback, we knew we needed to get as final as possible laptop models in front of IT Decision Makers and End Users. Only way to do this was in person. But if we conducted in person, we knew we needed to approach differently than with traditional focus groups.

• We needed to talk with a larger number of ITDMs and End Users.
• We needed to give them time to review our models before talking with us.
• We wanted to deploy both a survey and conduct a qual discussion.
• We knew this meant holding longer than “ever done before” sessions.
• And I knew this meant I had to sell this new hybrid approach internally, especially to my planners as I knew I would need their help and engagement more than ever… to design realistic/accurately weighted models, to shaping the research materials – both the survey and the discussion guide, workbooks and spec sheets.
• This all meant we needed to devote a greater amount of time and money to conduct this new hybrid approach.

So what does this new “hybrid quant-qual” approach look like?
In essence, we invite 18-20 ITDMs or End Users per session to potentially spend up to 4 hours with us. The first two hours are spent conducting a lab-like product evaluation (where they review the models, take notes in a workbook) - this is followed by them sitting down in a separate room and taking a 20-minute survey. We then ask a subset of the 18-20 to stay and spend an additional 2 hours with us for a discussion. What we have found with these qual discussions is that they are much more efficient since they have already reviewed all the models – and we cover so much more territory with this time.

At the end of the day, this new approach has been a success. I think a real game-changer. Because I have greater confidence in what we are learning and because of this approach, our planners and executives have confidence to take action on the insights and recommendations we bring back.
AMANDA:
What were the key ingredients of our success?

• **Ingredient #1: Our researcher partnership.** Jacki welcomed us as part of her extended research team and allowed us to immerse ourselves in the Latitude team’s business and get to know them.

• **Ingredient #2: Participant engagement.** We made sure to think of our research participants in a more collaborative light. They became something more than numbers, data points, and quote sources. We were honest and candid with them, disclosing Dell sponsorship, asking for feedback on new ideas. We asked them to work hard on our sessions, yet we consistently got feedback that our discussions felt like an inviting learning experience. Participants saw it as chance to meet others in their specialty field, see new products before they are released and learn about new technologies rather “being part of a research study.” This gave us permission to structure more of an interactive workshop environment: Allowing for longer sessions, interacting with models, and engaging them in creative activities to tap into their emotional motivation.

• **Ingredient #3: Stakeholder participation.** Meeting with stakeholders early on to help craft the research materials meant they could have more of a say and buy-in to what we set out to learn. When the team travels with us they don’t just observe, but help shape the insights through regular debrief sessions. They live and evolve the insights with us, so that final presentation voice of the customer and video became a co-created conclusion that we were all proud of.
JACKI:
A note about stakeholders. We realize that we are fortunate to have a strong internal partnership. Different organizational structures can sometimes get in the way of these relationships. And I had to earn my credibility as a trusted partner who can deliver fair, unbiased, strategic recommendations. This could be a whole separate presentation in itself.

What we will say, based on our experience, is that it’s critical to engage them as much as you can, because the payoff is so high. In our case, because the main stakeholders travel with us for this research, it means they are able to immerse themselves in research. We approach them as if we are taking them on a journey:

• Start with a research kick-off meeting and subsequent check-ins as you prepare.
• They are responsible for creating the research stimuli (models, spec sheets).
• Encourage as many as possible to be present at all sessions. We have 6 planners traveling around the world with us for two weeks next month.
• Hold debriefs after every city – so insights can be surfaced and evolve, socialized in conversations and emails with colleagues and managers…by the time we do a global report, it's simply a matter of aligning and getting on the same page. Even spending 15-20 minutes at the end of a city getting a “top 10” list of ideas up on chart paper goes a long way.
• Because we’ve all been involved in the process of discovery, developing the report can then focus on storytelling and visualization, less on synthesis.

Because of this highly involved, highly engaged process, everyone involved has more confidence in decision-making. And critical decisions are really made – based on this research!
AMANDA:
So, how do *you* get started?

Here are some steps you might take:

1. **Realize when it’s time for a fresh approach.** Are participants and stakeholders engaged and paying attention? Does your gut make you question insights? If so, maybe it’s time for a new approach.

2. **Identify non-negotiable business objectives.** What will make your research study a success? Work backward and brainstorm creative approaches to meet these goals.

3. **Learn from your recent studies.** Go back and evaluate a few recent projects. Grade them. What kept the project from an A+ in your mind? What would you do differently?

4. **Take stakeholders on your research journey.** Make them step into their customer’s shoes. Get them to verbalize as they’re processing the new information. When you develop new insights together, they will be more invested because they’ve contributed to the thinking. You’re not trying to tell them something they don’t know.

5. **Mix together your magic ingredients for engagement.** For us, it was our strong partnership, creating an engaging environment for participants, and involving stakeholders each step of the research journey. The whole process feels less like work by infusing curiosity and discovery.

JACKI:
Greatest measure of success of this new approach is that key strategic decisions have been made based on our research…and we have are deploying this same approach across more of our product lines. Amanda and I are now in the planning phase for our third year of conducting this new hybrid approach, refining it a bit each year.

We hope this will help spark new ideas for you to achieve the same! We’ll take a few questions now – and then it’s time for lunch!
Keep the conversation going...

linkedin.com/in/jackirahr/
linkedin.com/in/amandadurkee/
amanda@cognito-inc.com
+1-503-706-4999