Part Five

Background Building Blocks

Annex 1
The Research Brief

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INTRODUCTION

This chapter deals with the information exchanged between research buyer, or client, and supplier before consummating the agreement to initiate a project. As used here, the term "brief" or "briefing" encompasses both the request for proposal (RFP) issued by a buyer to one or more research suppliers, as well as the proposal prepared by the firms in response to the request. For clarity's sake, the terms "RFP" and "proposal" will be used to distinguish between the two.

Moreover, while primarily devoted to the preparation of written documents, the subject is treated very broadly here to cover all relevant communications, including phone discussions, meetings and correspondence back and forth between the parties.

Wide variation can be found in current practices for both RFPs and proposals, reflecting accepted norms in different countries and across various industries, the expectations of individual companies, research firms and their personnel, and the nature of the assignment.

Other variables that shape both content and form include the formality required in the bidding and/or purchasing processes – for example, to assure that all bidders receive the same information – and the degree to which the proposal serves as a legal contract.

No single "best practice" model can suit all these situations, and would inevitably be considered insufficiently rigorous by some and overkill by others. The emphasis, then, is more on the *nature* of the information to be exchanged than on the structure of the two types of documents. At the same time, a basic format will be suggested with the understanding that individual companies and firms will shape this to meet their own requirements.

Readers may also wish to consult the ESOMAR guidelines on "How to Commission Research".

The remainder of this section will be devoted to the two types of briefs, considered in turn, and then provide some additional guidance on the quality of the on-going information exchange. Hypothetical examples will also be provided to illustrate the points made.

FOCUS ON THE CUSTOMER BRIEF (RFP)

The request for proposal functions as a statement of *expectations* of the supplier. It provides a meaningful context and details requirements regarding both the process (beginning with the proposal and continuing through the project) and outcomes. As such, it should provide all the necessary and relevant information for the supplier to be able to design a response that will indeed fulfil these expectations.

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The sections generally covered in the RFP include:

- Background
- Research Objectives
- Proposed Methodology
- Deliverables
- Timing Requirements
- Budget (sometimes)
- Other requirements

Background

The background and objectives sections represent the most critical components of the proposal. The background should provide the historical context of the request, which might include the following:

- Brief description of the company, including primary lines and/or brands.
- Recent developments, such as a new acquisition, change in management, rise of a new competitor, etc.
- Relevant issues confronting the company, such as loss of share, commoditisation of the category, low brand recognition, poor coverage in business press, etc.
- The specific issue or circumstances that have led to the need to do research.
- Any prior research or consulting work related to the topic, and their conclusions.

Two things should be readily apparent from this list. The first is that in many circumstances, much of this background information will be unnecessary, either because the company is well known, or the supplier has worked with the company before. The second is some of this information may be quite confidential, and the customer is not willing to broadcast it, at least not at this stage.

Addressing the first concern is relatively simple – the depth of general information about the company provided depends on the audience. If the RFP is sent to suppliers with whom the client has not worked before, providing more of a general backdrop is reasonable and helpful. If, however, the RFP is only circulated among suppliers with prior experience of working for the company, much of this information can be trimmed back or eliminated completely.

The second concern is far trickier to deal with. Eventually, the successful bidder needs a detailed understanding of the objectives (see the discussion on the Continuous Briefing below). The question is, how much do the firms need to know to prepare the proposal, and at what stage of the process? As a general rule, the amount of "confidential" information imparted will depend on how widely the RFP is distributed (number of companies) and whether or not all of these companies have an established relationship with the client.

It will also depend on the stage of the process. In the initial stages a company may be screening through a larger number of firms and may want to limit the amount of information it provides. However, after selecting a few to submit more formal proposals, it may choose to provide a more detailed briefing to these "survivors". This need not necessarily be in writing, but more likely take place in a meeting with the supplier agreeing to respect the confidentiality of what he/she learns.

In fact, in may be good practice for companies to insist on a signed confidentiality agreement before sending any such information to potential suppliers. This need not be onerous or overly legalistic – just a form that states that suppliers will not divulge any information imparted by the company in preparation of the proposal to others, limit its distribution internally to those who need to know, and destroy or return any materials received if the contract is not awarded.

While the background section might well include some fairly general information about the company, its history, business and current situation, the thrust of the section should be on identifying the question, issue or need that has generated the desire for research. In some cases, this may mean delineating a real problem (such as declining share); in others, simply a pro forma statement of usual practice for that company. For example, an agency that always outsources copy tests for new creative does not have to spend much ink explaining this need, only state that it plans to launch three new 30-second ads in the coming season and requires copy tests be conducted on a certain schedule.

Research Objectives

Objectives should flow directly from the background – knowing the need. What does the company expect to learn from the research? While the single most critical aspect of the RFP, this section is often treated as if the answers were obvious or even redundant with the background section of an RFP. Without an accurate sense of what the research is intended to accomplish, the supplier can only really focus on the more mechanical/methodological aspects. Neglecting to clarify these objectives can even lead to serious consequences if the supplier takes an abbreviated version too literally and builds a design to address what he/she thinks the objectives are, only to learn in the end that the buyer really was getting at something else.

For example, a client asking for research to test a new product concept should explain the stage of development and expected output. This will have a profound impact on whether the appropriate method is a concept screen, concept test, conjoint or discrete choice optimisation, or a forecast.

In some cases, a flaccid objectives section may actually reflect the buyer's lack of clarity about the purpose of the project, or may serve as a cover for multiple agendas among internal stakeholders that have failed to form consensus before issuing the RFP, and are, in effect, dumping their failure in the lap of an unsuspecting supplier.

What *is* required is a clear and concise description of the expected *impact and output* of the research. Ideally, this should be presented as a series of statements or questions organised as a funnel, beginning with the broadest and ending with the most specific. This description should include, or even begin with, a statement of what decision(s) might be made on the basis of the research.

The emphasis should really be on *learning* rather than on answers to specific questions, and the buyer should avoid the temptation to start writing the questionnaire in the process.

An objectives section might be structured as follows:

- Decision to be made on the basis of the learning.
- Learning/understanding required to make that decision.
- Types of information required to achieve that learning.
- Scope of the inquiry (specific informational needs).
- Examples of questions that need to be answered.

ILLUSTRATION OF A HYPOTHETICAL OBJECTIVES SECTION

[Note: The Background section of this hypothetical RFP has already explained ABC Company's desire to introduce a new product in to the market that it hopes will reverse recent customer losses, and its decision to develop the "X-Thing" for that purpose.]

- ABC must decide whether or not to continue developing X-Thing or identify an alternative.
- To make that decision, it must understand basic unmet needs in the category, and the degree to which X-Thing is seen to address these needs.
- To get there, it must have a firmer grasp of the marketplace situation, dynamics, and motivation.
- Also, an objective reading of basic appeal of X-Thing in its current form:
  - If basically sound, can it be improved?
  - If basically weak, can the idea be salvaged or should it be abandoned?
- This requires in-depth information on:
  - key reasons consumers own this type of product;
  - penetration of current offerings;
  - drivers of selection and loyalty;
  - satisfaction with current offerings;
  - identifying areas of opportunity – dissatisfaction with current offerings;
  - interest in the X-Thing solution;
  - drivers of interest in X-Thing;
  - profile of acceptors.
- Among the questions that should be answered by the research are:
  - How involved are consumers in this category?
  - What brands do they own, prefer, know about?
  - How long have they owned their present brand?
  - What features or benefits resonate most with various target audiences?
  - How satisfied are they with what they own? What might they change?
  - How appealing is the X-Thing concept? Likes, dislikes?
  - How could the concept be improved?
  - Likelihood of acquiring at different price points?

Methodology

Many RFPs include a methodology section, either as a suggested approach or a mandatory guide. In fact, many documents contain considerable detail on anticipated method. Typically included in a methods section are:

- study design;
- analysis;
- universe definition (sample frame);
- sample size, structure, incidence, and source;
- means of data collection;
- location and language (sometimes).

As noted earlier, many factors may influence the complexity and flexibility offered in this section of the brief. These include the following:

- *Uniqueness vs. generality of the project*. A buyer may be more open to suggestions for a one-off ad hoc project as opposed to one that conforms to many done in the past.

- *Need to compare*. Far less flexibility in design may be allowed if the results of this study have to be compared to others done in other markets, or tracked with earlier studies.
- *Desire to maintain a level playing field*. A buyer may wish to have everyone bid on the same specs in order to be able to compare the proposed budgets on an apples-to-apples basis. This desire may also be affected by company policies.
- *Sophistication of the research buyer*. Some buyers are experienced research professionals who have a strong understanding of various approaches and informed opinions on what really serves their needs best. Others may be less experienced or not research professionals at all and may not even be aware of alternative approaches.

Study design refers to the overall structure of the research, such as the proposed number of cells or focus groups, the general nature of the inquiry (concept test, awareness and usage study, ideation session, etc.), and will inevitably flow into other aspects such as sample, analysis and data collection method. Examples:

> We envision a concept test among three monadic cells, two seeing the two new products under consideration, the third a control cell evaluating our current offering . . .

> The study involves a series of two-dozen in-depth interviews among recent or likely visitors to our theme park regarding their general desires for a family destination; sources relied on in selecting a family vacation; and experiences and/or expectations of our park . . .

> To meet the objectives stated above requires a segmentation study of the entire Columbian market for recorded classical music, with the various segments distinguished by their relative profitability. . . A sample of at least 1200 such consumers is envisioned . . .

An RFP may list *analyses or procedures* desired, either in general terms or more specifically. For example, the brief may simply state that the research will determine the drivers of usage in a category, anticipating each supplier will recommend their own approach or model – or suggest an alternative. Or the brief may list specific multivariate analyses expected to meet this end.

In many cases, it is probably best to limit the analytic requirements to a general statement incorporated within the design description, and focus on the desired output of the analysis in the discussion of deliverables discussed below.

Universe definition or sample frame. Suppliers should be told what audiences are to be included in the study, precisely how they are defined, and what their estimated incidence is among the general population.

Buyers often mistake descriptions or profiles of target audiences for definitions. For example, they may say something like, "Prior research indicates the target audience for this study is predominantly male, between 40 and 45 years old, mid- to upper income, with a strong interest in the latest technology." While an accurate description of the "typical" target, the actual audience to be included in the study may be much broader and has to be spelled out. In this case it might be, "Adults 30–65, full-time employed with at least $ 50K annual income who have purchased at least one of the following high-tech products within the past 3 years . . . ".

For B2B studies it is necessary to define both the qualifications of companies to be included as well as those of the respondents. For example, "Executives of mid-sized businesses, defined as having annual revenues of $ 10–100 million, have more than one facility, and have been in business for at least one year. Qualified respondents will have primary company-wide responsibility for the purchase or lease of telephone systems."

Incidence is often a critical aspect of pricing, so data on the proportion of qualified respondents within a population, whether as broad as the general population or as narrow as customer lists, should be shared. (Where not available, suppliers will provide bids based on either their or the client's estimates, but will probably include a contingency in case these estimates are off the mark.)

Sample Structure. If the client wishes to establish any *sample quotas*, these should be clearly spelled out in the brief. This is true both for straight quota samples (to make sure specific groups actually are captured in the final sample in their true proportions) as well as stratified samples in which over-samples or augments of specific groups are desired.

The brief should also state that the final sample should be weighted to match the specified sample universe.

Desired *sample source* may or may not be left to the supplier, unless the client intends to provide lists, such as those of customers (see below). Some buyers may choose to specify the specific source or type of source to be used, such as an Internet panel with certain characteristics, random phone numbers for RDD or published lists of businesses or professionals for B2B studies.

In the case where the client is providing list sample, the nature, origin, size, accuracy and other relevant information about the list should be provided, along with the relevant fields available. Key is contact information, including name, address, phone number(s) and email addresses. Any other information that might relate to screening criteria, such as how long someone has been a customer, size of purchases, number of times called customer service, etc., should also be included if known.

Besides the types of fields available on the list, the supplier should get a sense of the presumed incidence of qualified respondents, and an honest sense of the "goodness" of the list. This would include information regarding the proportion of cases in which specific fields are actually populated (for example, while a field for email address is provided, it may only be filled in one of four cases); and the recency of these data (for example, phone numbers may be collected when a customer relationship is established, but rarely updated).

The proposal should also make clear who will be pulling the actual list to be used for sample from the data source, and whether any efforts would be made before providing the list to increase its effectiveness, such as only providing listings with complete contact information. If phone numbers are to be matched to published phone records, the responsibility for that should also be clear.

In all cases, but especially in those using customer lists, the RFP should clearly state whether or not the survey will be blind.

The RFP may specify or suggest the *data collection method* to be used, which generally stems from the overall design. The expected length of the interview or focus groups should also be provided, since that too can have a significant impact on cost, and should be tied to the data collection method. In many countries a personal interview can last far longer than a phone interview, while the maximum length of an Internet survey may be even shorter.

Location. Qualitative and quantitative studies requiring personal interviews will generally specify the cities in which research is to be conducted. Some studies may even require more precise information, such as in-home interviews, store or mall intercepts, recruitment to a downtown central-location, or secret shopping locations.

For international studies or those among ethnic groups, *language* requirements and translation responsibilities should also be clearly spelled out for survey instruments, stimuli, and

deliverables. For example, an RFP for a qualitative study in the US might specify that six focus groups are to be conducted in English and two in Spanish; that the client will provide stimuli in both languages but the supplier will have to translate the English versions of the final screeners and guides into Spanish; and that transcripts of the Spanish audiotapes will have to be translated into English.

In general, it might be said that too many companies overemphasise certain methodological requirements in their RFPs, especially when it comes to ad hoc studies conducted to address what might be termed "occasional" issues or larger strategic questions. But these are precisely the areas in which good suppliers can make substantial contributions to the impact of a research effort, delivering the "added value" so often demanded.

This applies most particularly to the research design. In cases where the solution is not bound by the need to conform to other research, inventiveness should be encouraged. Thoughtfulness in designing a study to meet the stated objectives can, in fact, be a major differentiator among bidders. It may also challenge a buyer to re-think the nature of the inquiry or some of the underlying assumptions. At the very least, having the option of evaluating a number of competing approaches provides the buyer with the best thinking of a number of experienced, outside professionals as opposed to that limited to internal participants.

Other aspects where companies tend to over-prescribe include the number and size of sample cells, data collection methods and questions to be asked. These, of course, may be determined by the overall approach under consideration, but an individual supplier may also have recommendations to make in these more specific areas as well. For example, an RFP may cite 200 online interviews among small business owners using an Internet panel. A supplier may believe that none of the small business panels currently available in that country are truly representative, and recommend an alternative method.

The issue of the hallowed "level playing field" may still have to be dealt with in many companies. While conceived to ensure fairness and equal opportunity in the bidding process, this policy practically forces a decision on price. It can be held chiefly responsible for the mediocrity in output, as well as the over-reliance by firms on branded products. The underlying assumption of this policy is that research is essentially a commodity and fails to recognise that suppliers are anything but equal. It makes no allowances for the wide variation in quality of sampling, field, tabulation, and coding activities, and provides no space for the intellectual and creative contributions suppliers can make to the success of a project – and the larger enterprise which it serves.

Buyers are strongly urged to place sufficient weight in their RFPs on the methodological input of the bidders even when required to adhere to a totally equitable bidding process. The simplest solution is to provide a suggested method and ask all suppliers to provide a bid for that design, but also encourage them to offer alternatives and the opportunity to express the reasons for these.

At the same time, there are methodological aspects that should be more carefully delineated than is often the case, particularly those that relate to universe definition and sample structure, incidence and source.

Deliverables

Deliverables refers to the entire range of materials and other things the supplier is expected to deliver. Often suppliers and buyers may find themselves divided by a common language without hard definitions, where terms such as top-lines, reports, presentations, tables, findings, etc., may convey different meanings. It is essentially up to the buyer to state what he/she wants,

and clarify exactly what the terms used imply. And this must be done in the RFP, since price, among other things, will be significantly affected by this.

Deliverables may include:

- Survey instruments including screeners, questionnaires, and moderator's guides;
- Sample plans;
- Field reports;
- Cross-tabulations (tables);
- Multivariate analyses;
- Qualitative output;
- Preliminary or top-line reports;
- Final reports;
- Presentations.

Some of these items may be generated by the supplier but not desired by the client.

The brief should specify the number of *survey instruments* and expected variants or versions. For example, a study among three separate audiences may require a very similar questionnaire with 80 % overlap among them. On the other hand, a study that involves interviews with both customers and prospects might require two relatively distinct questionnaires with a completely different line of questioning and only a 20 % overlap.

The number of open-ended questions that have to be coded should also be specified.

Sample plans include both source and type of sample as discussed above, but also may require more specific documentation once the study has begun. For example, a B2B study in Brazil may require a detailed plan indicating the number of businesses to be interviewed in three specific regions broken into cells by company size and industry category.

Field reports are generally provided by field departments or services to the supplier team. Buyers should indicate their desire to receive them as well if interested.

Most quantitative studies generate *cross-tabulations*, and the decisions regarding these data are generally left to the supplier. (Cross-tabs are often referred to as "tables", but should not be confused with those shown in a report document.) However, it is good practice for a buyer to indicate the anticipated number of banners to be produced, since this not only affects cost but indicates the amount of "slicing and dicing" desired. Some buyers may also wish to specify the level of statistical testing or other features.

In addition, if a client expects to review materials that may not be common practice, such as the tab or banner plan, coding frame, or receive a hard or soft copy of the raw data or tabs, this too should be clearly stated in the brief. This also applies to the raw output of *multivariate analyses*.

Essentially, a client's request to receive such data is a strong indication of the desire to be directly involved in the analytic process.

For *qualitative* projects, a different set of potential deliverables arise, and the desire to receive these should also be spelled out. These include audio and videotapes, and whether a stationary or manned camera is preferred; transcripts; need for remote access (via videoconferencing, video streaming, telephone, or other media); and whether video clips from the groups are to be inserted into the report. (There are also legal and ethical restrictions in many countries concerning the use of films of groups or individual respondents. Buyers should make themselves aware of these restrictions before finalising a brief.)

If interviews or groups involve more than one language, or another language from that spoken by the research buyer, the need for simultaneous translation and possibly the translation of all deliverables should be specified.

Reporting. The terms top-line report, final report, and presentation can mean different things to different professionals and are best clearly spelled out in the RFP. The brief should indicate the preferred format, nature and even expected length of these documents. Format includes type of file (Word, PowerPoint, etc.). Nature is a more general term that should indicate the relative extent of non-verbal materials (tables, charts, graphs, etc.), the degree to which verbiage is desired and the preferred form (full sentences or simple bullets), and the relationship between verbal and graphic elements.

(Since there is such a wide diversity of practice and preference, a buyer is well served by providing actual examples to the supplier after the project is awarded, especially if they haven't worked together before.)

- A *top-line* or *preliminary report* is generally an initial assessment of key findings, often restricted to total. It may or may not offer any interpretation or summary judgments.
- A *final report* is usually the most comprehensive statement of the research findings and implications, and may include tables, charts, graphs, and explanatory text. It often includes a summary of findings and some kind of assessment of the meaning of the findings to the client.
- A *presentation* can refer either to the act of the supplier presenting the results to the client, the document that is presented, or the final report itself (which is often but not always the same as the document presented).

Timing, Budget, and Other Requirements

Buyers should provide realistic parameters for both timing and budget in their briefs so the suppliers can build designs appropriate to both. Unfortunately, these are often the areas of the brief where open communication breaks down.

Schedule. Clients often set stringent timing requirements quite arbitrarily, to avoid giving the supplier too much latitude, in the process potentially eliminating better approaches that might require a longer duration to complete. If there is no hard deadline, it is best if the RFP suggest a timeframe for completion but keep it open for discussion.

In fact, timings often reflect the eagerness to receive the results rather than a true understanding of the time it may require to "do it right" or even at all. If the buyer takes too strong a stand on the time allowed, less than optimal sample sizes, data gathering methods and analyses may be used, and quality controls may slip.

If, in fact, timing is linked to a fixed delivery date, such as the need to present the findings at a meeting already scheduled for a specific date, or to launch a campaign at a certain time, that deadline should be clearly indicated in the brief. In such cases, the anticipated awarding of the project should also be provided, so the supplier knows how much time he/she has to finish the project.

There is generally no need to dictate a detailed schedule for the supplier, which could border on micromanagement, unless there are, again, real milestones before the end of the project that have to be observed, such as a review of preliminary findings by senior management by a certain date.

Budget. Many buyers hesitate to provide any budgetary parameters, even if the budget is already fixed, out of fear that all the bidders will simply put this price tag on their proposals regardless of true cost or value of what they propose. This is short-sighted and often self-defeating. A set of objectives can be met at different levels of completeness or rigour and it does no one any good if the supplier proposes a comprehensive solution to the research purpose which far exceeds the (hidden) budget. In fact, stated objectives may be overly ambitious for the monies allowed, and a supplier may come back with a suggestion that the objectives be pared back in order to fit the budget.

It is generally far better for a proposal to state the anticipated budget range, and also indicate how much, if any, flexibility there might be. This way suppliers can build their best designs within the budget allowed, but also know whether it is worthwhile to suggest a more costly alternative.

Other requirements. The brief should provide a clear statement of basic information that the suppliers should be aware of in preparing the document. This should include contact information, the delivery due date, acceptable or required form of delivery (electronic file, mail, courier, etc.) which may be fixed in terms of a sealed bid, number of copies required, and anticipated date of awarding the contract. It may also be a good idea to let the bidders know what the selection process involves, and if an in-person presentation of the proposal is anticipated.

In addition, the client may wish to spell out the decision criteria to be used in evaluating the proposals received. This is a good way of letting the bidders know if their offerings are going to be judged primarily on originality of design or on cost, for example.

ILLUSTRATION OF A COMPLETE RFP

The following is a hypothetical example of a fairly extensive RFP for a large-scale ad hoc study sent to suppliers not expected to be very familiar with the company, if at all:

Background

JHF Corp. is a leading Canadian manufacturer of hardwood furniture. Founded in 1923 by Jack Hudson, Sr., the company has grown from a small family-based operation employing less than a dozen craftsmen and serving the local Calgary market to a global player with plants in six countries employing over 10 000 people. The company remained a fairly small enterprise until after World War II, when demand for quality furniture, especially in the US, jumped dramatically. Global expansion was fuelled in subsequent decades by a rising world economy, reduction of tariff and other trade barriers, and the development of machinery that allowed the widespread reliance on workmen in cheaper labour markets without sacrificing product quality.

Today the company enjoys a leading position in the high-end furniture market in North America, and is increasing its share of the market in Western Europe, South America, and the Far East. Historically, it has relied on independent furniture stores as its primary distribution channel. A number of its lower-priced lines, however, have been available in a few Canadian furniture chains since the 1940s.

The company remained family-owned and managed through three generations, until Jack Hudson III decided to bring the company public in 2003. He still serves as CEO and is the majority shareholder. Going public has, however, brought the company a new set of

stakeholders, including the financial community, an expanded business press, and investors and consumers in over 30 countries.

Some recent press coverage and analyst assessments of the company have not been particularly positive. A few questioned the long-term strategy of the company and the current leadership's ability to abandon its traditional ways and adapt to a rapidly changing global environment.

In 2003, JHF engaged Booz-Allen to assess the company's position vis-à-vis competitors around the world. Their findings indicated that while the company was well regarded within the category and among the furniture trade press, it was hardly known among many other key audiences. BA also suggested that the traditional distribution system might become increasingly outmoded with the increasing dominance of mass market outlets.

Objectives

In light of these findings, JHF wishes to carry out a large-scale multi-country quantitative research programme among professional and consumer audiences. The primary objective of this initiative is to provide a sound basis for a number of decisions regarding the company's corporate positioning and communications efforts to multiple audiences, as well as the viability of the company's channel strategy. Decisions likely to be made based on the research include:

- Whether or not to develop a new corporate positioning strategy, and if so, what key messages should be emphasised.
- How best to meet the needs for information about the company and its products of specific audiences.
- Whether to place greater emphasis on consumer vs. professional audiences in marketing the company's products.
- Whether to continue the historic reliance on the independent high-end retail channel, or develop alternative channels, especially outside of North America.

Specific objectives include:

- Determine the overall reputation of the company among key audiences.
- Evaluate the impact of the company's current communications in terms of building brand awareness and associations with quality.
- Evaluate the relative position of the brand vis-à-vis competitors on a market-by-market basis.
- Evaluate the perceived effectiveness of its reliance on independent retailers.

Areas of inquiry are likely to include:

- Awareness, familiarity, and specific knowledge about the company and its competitors.
- Reputation of the company and competitors in general and on a battery of attributes.
- Sources of information about the company, including advertising recall.
- Among professional audiences:
  - awareness/perceptions of the recent public offering;
  - experiences with the company, its products, and with those of competitors;
  - key trends affecting the industry.

- Among buyers:
  - where they shop for furniture;
  - sources of information relied on in the process;
  - pieces/brands purchased recently and why chosen.

Proposed Methodology

The research will consist of a series of quantitative surveys among multiple audiences in five countries – Canada, the US, the UK, Germany, Japan and Brazil. The audiences include the investment community (both buy-side and sell-side), general business media, furniture trade press, furniture retailers and recent buyers of high-quality furniture.

Each audience will be analysed separately and, wherever possible, compared to the others. For larger groups, responses will also be analysed on a country-by-country basis. Inherently smaller groups, such as the trade press, will be evaluated in aggregate with only directional differences among countries reported.

Sample description:
The proposed sample for each country is as follows:

- Analysts – 100
- General business media – 100
- Furniture trade press – 25
- Independent furniture retailers – 50
- Recent purchases of high-quality furniture – 200

(One-quarter of the Canadian interviews should be conducted among the French-speaking population, and at least some of the interviews among the professionals should also be conducted in French.)

Suggested descriptions of each audience follow. However, local variants will arise, and recommendations from the supplier are welcomed:

- Analysts – professionals employed either by investment firms or institutions to evaluate manufacturing stocks.
- General business media – editors, reporters, and columnists employed in the print, electronic, and online media with primary responsibility for business.
- Furniture trade press – editors, reporters, and columnists employed by publications targeted to the furniture and allied trades.
- Furniture dealers – a cross-section of owners, managers, and buyers for wholesale and retail outlets primarily devoted to furniture.
- Recent purchasers – Consumers who have purchased at least one piece of high-quality furniture costing at least US $1000 including a bed, chest, table, chair, sofa, breakfront, etc. within the past 12 months.
  - Incidence will vary across the countries but is expected to range from 5 to 8 % based on trade data

Sample sources: Suppliers are expected to generate their own sources of sample for each audience. JHF will provide lists of trade publications and major wholesale and retail outlets, but these should not be considered exhaustive.

Data collection method: It is suggested that all interviews be conducted by phone, but alternative methods, especially for the professional audiences, may be suggested. Interviews

are expected to last about 20 minutes and contain six to eight open-ended questions requiring coding.

Deliverables

The study is expected to require two basic questionnaires – one for the professional audiences, with about an 80 % overlap among the four groups, and another for the consumers that will have only about 30 % overlap with the other versions.

It is suggested that a basic English version be developed and then modified for individual countries if necessary before being translated into Portuguese, French, German and Japanese.

The supplier will be expected to develop a sample plan for each country, noting the source(s) used for each audience, which must be approved prior to commencing field work. The supplier will also provide a weekly summary of the status of field work by audience by country, and report on any issues that may arise during the interviewing.

Each audience will have its own set of cross-tabulations with at least two banners including breaks for the individual markets. No weighting of the data is expected.

Reporting: The agency will provide top-line reports for each audience as all the interviews are tabulated. These will consist of summaries of key findings based on totals in word format without charts or tables approximately eight to ten pages in length.

The final report will consist of a full analysis of the entire data, broken down by audience and, where possible, by country within audience. The report will contain charts, tables, and graphs and explanatory text in a PowerPoint format, along with an executive summary, and a set of implications and recommendations.

The supplier will be invited to present the results at JHF Headquarters in Calgary.

Timing, Budget and Other Information

We assume the study will last between four and five months considering the number of audiences and countries involved. The proposal should contain a detailed timetable as well as any efficiencies that might speed up the timing required.

The proposal will also provide a budget break down of costs by country and audience, as well as indicating the approximate proportion of the total accounted for by direct or out-of-pocket costs and those accounted for by professional time and other fees including overhead and profit.

JHF envisions this project will cost approximately $ 300,000 Canadian.

Besides the information cited above, proposals should contain the following:

- Age and size of the firm (in terms of full-time employees).
- Relevant experience and references.
- List of key members of the team who will be handling the project and their respective roles.
- Relationships with field services in the various countries (whether owned by the firm, part of a preferred network, or independent sub-contractors).
- Full description of any proprietary models recommended.

Responses to this RFP are due by 25 November 2006. Any questions should be directed to Sheila Jones, Research Director, at the contact information listed below. JHF expects to award the project by year end.

FOCUS ON THE SUPPLIER PROPOSAL

The proposal generally serves two overlapping needs – as the response to a specific request and as a sales piece. Balancing these purposes is one of the greatest challenges facing the supplier, and will, of course, be affected by the degree to which the buyer already knows the supplier.

As noted at the start of this chapter, tremendous variation exists in terms of the length, style, detail and content of proposals, reflecting both the common practice of the firm as well as the expectations for a specific project. It can be said, however, that many proposals over-emphasise certain aspects, tending to lean too heavily on the sales side while failing to focus sufficiently on the project at hand.

A few general principles that should guide the writing of proposals are writing to the audience, relevance, responsiveness, clarity, brevity, organisation and accuracy.

- **Writing to the audience**. As much as possible, the proposal should be customised to the primary reader(s) of the document. If the supplier has not worked for a client before, it is a fair question to ask the buyer's preferences in terms of length, format, etc., as well as the level of research sophistication of the recipient. Some buyers will judge a proposal on their originality, others on the graphics.
- **Relevance**. As much as possible, the proposal should focus on the project in question. Establishing the credentials of the firm is important, but should relate as much as possible to what is being requested. For a French firm, proposing on four food product focus groups in Paris on behalf of a French client, it is hardly necessary to cite the agency's 20 overseas offices, expertise in eight product categories, or list of proprietary quantitative models.
- **Responsiveness**. Remember that the proposal is a response to a request, and all the elements requested should be addressed. Err on the side of completeness. If certain aspects cannot be answered, that should be stated. Similarly, if the supplier decides to offer an alternative approach, the original idea should be acknowledged before it is rejected. ("While the RFP calls for an evaluation of the equity of a series of brands, we believe the objectives really call for a line optimization study. . . ")
- **Clarity**. The buyer is looking for specific information, often to compare one proposal to another, and these are best communicated in straightforward statements without ambiguity.
- **Brevity**. Relevance and clarity should lead to shorter sections and (hopefully) shorter proposals.
- **Organisation**. The structure of a proposal can not only support its persuasiveness, but also assist the buyer's ability to evaluate and compare it to others. Less critical sections can often be placed in an appendix rather than interrupt the flow.
- **Accuracy**. While speed may often be required to prepare a proposal, there is no excuse for misstatements, typos, misspellings (especially of the client's brand names) or other errors. If cutting and pasting from an earlier document, make sure no inadvertent baggage is carried over – such as a sudden mention of dog biscuits in a banking proposal.

The sections most often included in a more formal proposal include the following:

- Introduction and overview of the company.
- Understanding of study background and objectives.
- Proposed methodology.
- Deliverables.

- Supplier and team credentials.
- Timing and budget.

Introduction and Overview of the Company

A proposal often begins with a brief statement declaring exactly what it is, referencing the specific request to which it is a response.

Illustration

> ABC Research is pleased to present this proposal in response to Halfwit Corporation's Request for a Research Proposal dated 31 October, 2006. Our proposal is based on that document and on follow-up discussions with Jill Knowles, Halfwit VP for Intelligence.

While this may appear to be a statement of the obvious, it may eliminate any ambiguity in case the client has more than one RFP outstanding, or if the RFP in question has been amended a number of times. In addition, it establishes the precise basis for information and puts assumptions governing the proposal clearly in the client's court.

A brief description of the supplier often follows which should serve to establish its basic credentials and a meaningful context for the proposal that follows. It is generally *not* the best place to pitch the company itself. Remember, the primary subject of a proposal is how best to meet the needs of the client, not the curriculum vitae of the supplier. Forcing a prospect to read through pages of self-praise before getting to the matter at hand may create a dissonance.

Key topics that may be included in this part of the introduction are age, size, and relevant experience of the firm; special or unique capabilities; and something about the character of the firm. The last item is often the most challenging since so many agencies today make such similar claims to adding value, providing insights or actionable results, shaping decision-making, etc., that differentiation has become exceedingly difficult.

ILLUSTRATION OF A HYPOTHETICAL INTRODUCTION AND OVERVIEW SECTION

> ABC is a well-established Swiss firm serving the pharmaceutical industry globally since 1978. Based in Basle, the firm offers a highly experienced professional staff of 25, complemented by a support staff of 18. In addition, ABC owns and operations its own physician panel and multi-lingual field operation dedicated to interviewing hard-to-reach healthcare professionals, as well as consumers and patients.
>
> ABC prides itself on designing and executing research studies customised to meet the objectives of our clients, and delivering concrete recommendations for marketing, product, and communications decisions.

Understanding of Study Background and Objectives

This section generally comprises a level-setting exercise, demonstrating that the supplier understands the task at hand, often repeating verbatim the comparable sections in the RFP. While parroting back objectives is almost inevitable, suppliers should remember their audience when reviewing the background information. A buyer hardly needs to be told what business they're in or other facts about their own company. The only background information worth

citing is that directly related to the research request, such as a problem that has emerged or a decision that has to be made. A quick summary should suffice.

Since this section is nearly totally derivative, it is best introduced with words to the effect, "As we understand it, . . . ". However, if the supplier wishes to (diplomatically) question any assumptions underlying the objectives, these should follow a recap of those stated in the RFP. (It is assumed that any unintentional ambiguities or omissions in the objectives will have been clarified before drafting the proposal.)

For example

> The objectives as provided in the RFP appear to assume that the loss of market share is directly attributable to the rise of a new competitor. While certainly possible, we recommend testing this hypothesis directly in the research, making the identification of the cause of brand erosion one of the primary objectives of this effort.

Proposed Methodology and Analysis

This is the first section in which suppliers can truly shine, and they should take this opportunity to demonstrate their creativity, methodological sophistication, and understanding of the larger business issues at stake – assuming the buyer allows this.

If the RFP recommends or even mandates a study method, that must be acknowledged and at least considered. If the supplier essentially agrees with this solution, then opportunities to elaborate on specific aspects covered in less detail should be taken, demonstrating thoughtfulness by filling in the blanks. For example, a supplier might offer a more precise definition of the sample frame, offer a specific sample source, offer a questionnaire outline, etc. Slight modifications might also be offered in this vein – "While the RFP calls for balanced cells of 150, we believe the minimum size should be at least 200 per cell to allow for a comparison of male/female responses within each cell."

More radical departures from what was requested require more elaborate explanations, especially if the supplier is, in effect, not only rejecting the buyer's approach but refusing to bid on what was asked.

Illustration

> While the RFP calls for a series of focus groups with former customers, we do not believe this approach can effectively meet the primary objective to provide concrete guidance to build retention. We believe that meeting that goal requires a full understanding of why most customers remain loyal while others decide to leave. The real task is to identify the key expectations and how well they are being met among the customer base as a whole, including recent attriters. We believe this can only be done through a large-scale quantitative survey . . .

This is also the section where suppliers can explain the benefits of their proprietary models. Firms can be justifiably proud of the tools they have developed to address specific research needs, and buyers are often beneficiaries of the work that has gone into these models. Suppliers should take care to link them to the objectives and keep the discussion relevant. A proprietary system may be able to do five things, but if only two are really called for in this study, those two alone should be addressed. The point is to customise the boilerplate or at least delete unnecessary sections. (This can be especially true if the standard presentations have been developed with a particular audience in mind. For example, some model descriptions are

written to convince statisticians that they are technically superior to competing approaches. But that may be totally inappropriate for a general marketing or even research audience not versed in the technicalities of the issue.)

Deliverables

This section, like Background and Objectives, often entails repeating what has been requested. If is often worthwhile to elaborate these items to prevent any misunderstanding around expectations at a late stage in the process, stating what the supplier means by terms such as top-line, presentation, etc.

The primary exception, of course, is the output from any proprietary models, or other material that may not be called for in the brief. Model output may best be incorporated in the prior section in which the models are introduced, and the same might be true for other ways of illustrating findings, such as perceptual maps or profiles of segments. Providing illustrations with clear descriptions can be very helpful.

Supplier and Team Credentials

While the firm generally introduces itself early on, it is recommended that a more detailed description be held until later in the proposal. Primarily, this shifts the weight of the sales pitch toward the back, when the buyer will hopefully be more inclined to hear it based on the preceding sections. It also produces a better flow: "We understand what has to be done, now we'll tell you why we are the right people to do it" often works better than "We really are terrific, now we'll review your assignment".

Often included here are a more detailed profile of the company, its philosophy or mission, history, principals, relevant experience, clients served, case histories, awards received and credentials of the team if the project is awarded. The great bugaboo is irrelevant boilerplate. Many buyers *do* want assurances that their suppliers are not only legitimate but can claim a solid position and enjoy a reputation within the research profession. (This can be especially true if an in-house researcher has to "sell" a supplier to a non-research audience unfamiliar with all but a handful of supplier names.)

But while conveying some sense of the breadth of the firm's activity is appropriate as a means of establishing its size or stature, long descriptions of specialties, tools or geographies not called for in the proposal should be avoided. Additional information on a firm can always be slipped into an appendix.

Perhaps more relevant, this is the place to refer to the firm's adherence to international or other ethical codes of conduct, and to meeting other standards, such as ISO. Such statements underscore the professionalism of the firm and the seriousness with which they take their responsibilities – to their clients, their respondents and to their profession itself.

Experience – particularly that with the client itself or in the category – can be very persuasive, since one of the biggest concerns buyers have is a supplier's lack of understanding for their business. Experience with a similar kind of assignment in another category can (or at least should be) equally compelling, since it demonstrates the proven ability to address a similar marketing or other problem successfully. Case histories are often powerful tools in demonstrating both understanding as well as ability to solve problems.

Providing lists of clients within or outside the category has become widely expected, but alone may not be as impressive as suppliers often think and may connote little more than name

dropping. On the other hand, a description, however brief, of what was done for a specific company, the size of the project and results take on a whole new dimension. (Suppliers must, of course, obtain a company's permission to provide such details.)

A list might include items such as the following:

> **Ergo Frozen Foods**. Carried out a major brand equity evaluation of an entire line of frozen potato products, leading to the consolidation of existing brands and the company's development of an entirely new area of frozen snacks.

Providing former client names as references is sometimes done but not mandatory unless requested.

The purchase of research is similar to that of many other professional services, where clients often buy the services of a person or persons, not the organisation for which they work. Including the names and credentials of the key team members who will handle the project can personalise the proposal while adding substantially to its credibility. It is most valuable to list not only the people but their roles within the team. It is especially important for the client to know who the primary or day-to-day contact will be, and who has ultimate responsibility for the success of the project.

Presenting the team in the proposal also creates an obligation on behalf of the supplier too often ignored. If the individuals are important enough to cite in the sales process, they are certainly important when the project is awarded. Substituting personnel to meet the supplier's needs amounts to little more than "bait and switch". (This practice raises even more ethical issues when carried out during the project itself.)

Timing and Budget

This section – often the first read by the buyer – should be kept brief and to the point. A detailed schedule by stage is recommended. Often it is best to write this in terms of duration – elapsed time from authorisation in days or weeks – than calendar days, since a schedule tied to a specific start date will immediately become outdated if the project start is delayed.

If the time required is different from that anticipated in the RFP, the reasons for the longer time required should be spelled out.

It is customary in many cases to provide only the total costs for a project, or totals for various scenarios. For example, if the RFP requests bids on two sample sizes, both numbers would be given. Many firms resist providing detailed breakdowns of their costs since it opens them up to pressure to cut non-direct costs such as professional costs, overhead, or profit. If clients insist on a more detailed breakdown of costs, suppliers have to consider whether or not they wish to provide this.

ILLUSTRATION OF A PROPOSAL

The following is a hypothetical, somewhat abbreviated example of a fairly formal proposal:

> <u>Introduction</u>
>
> Insights Unlimited GmbH, is pleased to present this proposal in response to the RFP issued by Sauber Plus for a New Kitchen Product Test dated 1 October, 2006. We appreciate being given this opportunity and believe we are particularly well suited to carry out this project.

Since its inception 25 years ago, Insights Unlimited GmbH (IUG) has devoted its energies to wedding the most sophisticated research techniques to the practical marketing requirements of its clients. Above all, the firm is committed to the success of its clients where it really counts – the marketplace.

Originally established in Munich, IUG now has offices in London, New York, and Seoul. Despite its growth as a leading supplier in three continents with over 75 full-time research professionals, the firm retains the same high standards of client service and customised attention that it did when it was a five-person operation.

Background and Objectives

As we understand it, Sauber Plus, a leading manufacturer of kitchen cleaning products based in Düsseldorf, is in the process of developing a new scouring pad product. Historically, the company has dominated this category in the Northern German market and has, over recent years, made sizeable inroads into the rest of Germany, France, Spain, and Poland.

However, competition from leading US, British and Italian brands has intensified in these markets and even begun to challenge Sauber Plus's primacy in its core area. Moreover, low-cost products from former members of the Soviet bloc countries are starting to win share, especially among lower-income households.

In response to these circumstances, Sauber Plus has decided to develop a new generation of products that offer greater durability and more effective cleaning agents without increasing retail prices. The first of these innovative items likely to be launched is a new scouring pad for heavy-duty cleaning of cast iron and stainless steel pots and pans.

Before investing more heavily in R&D, the company wishes to conduct quantitative research to confirm its hypothesis that this type of product will be well received by German housewives and other buyers.

The primary objective cited in the RFP is to provide an objective basis for the development of this new product. Specifically, the research will:

- Determine the level of interest in the product among a broad cross-section of German housewives and others;
- Identify the features, benefits, and product attributes that drive appeal;
- Identify any potential ways in which the product could be improved, or aspects that take away from its appeal;
- Establish a hierarchy of needs when it comes to kitchen cleaning products in general, the satisfaction with current product offerings, and the degree to which the new pad is expected to meet critical needs;
- Identify and profile the most attractive target(s) for this new pad.

Study Method and Analysis

The RFP calls for a concept test carried out in a number of central locations (hall test) throughout Germany. Sample size and markets (with the exception of Düsseldorf) are left to the supplier. Stimuli provided would consist of printed descriptions of the product and illustrations showing its use, but no prototypes would be available.

Based on the RFP and subsequent discussions with Jörg Finsster, Director of New Product Marketing, we recommend the following study design:

General – A concept test using personal interviews conducted in five central locations across Germany – Düsseldorf, Berlin, Frankfurt, Munich and Freiberg.

Sample size and description – 500 interviews, 100 in each location, consisting of housewives, single men and single women. Specifically, in each market:

- 60 housewives aged 25–65, currently married;
- 20 single, divorced, or widowed women, 20–65;
- 20 single, divorced, or widowed men, 20–65;
- No quotas for size of household or presence of children are needed.

Additional qualifications:

- All respondents will be in the scouring pad category and the primary purchaser of kitchen cleaning products in their household.
  - To be in the category, respondents must buy at least one box of scouring pads a year.
  - Incidence estimated at 80 %.
- Minimum annual household income of 12 000 Euros.
- All interviews will be conducted in German, but no ethnic qualifications will be established.

Respondents will be recruited by phone and/or street intercept depending on the city.

Questionnaire length – the interview is expected to last 40 minutes using a CAPI system. At least six open ended questions are expected to be asked and coded.

IUG has developed a highly successful method for concept testing that combines certain qualitative techniques with rigorous quantitative measures called CapSize. This approach begins with a less structured inquiry focused on the feelings surrounding the tasks involving a specific type of product type, associations with the products themselves and the current brand offerings before collecting more concrete usage data. This process increases the engagement of the respondent in the interview before being exposed to the new concept and other stimuli.

All the data will be cross-tabulated using two banners.

Deliverables

The deliverables will consist of a top-line report, based on total only, to be provided two weeks after the end of the field work. This brief document will summarise key findings in no more than ten pages, and will contain at most four to five tables.

The final report, in PowerPoint format, will consist of a full description of the findings using charts, graphs, and tables with explanatory text relying on bullets rather than full paragraphs. The report will also contain an executive summary of findings and a set of conclusions and recommendations.

We will be pleased to present the findings in the Sauber Plus headquarters at your convenience.

Company Profile

Insights Unlimited GmbH was founded in 1978 by Prof. Hermann Deutsch of the Economics Dept. of the University of Munich and Philip Dreiser, then serving as head of

research for a leading German confectionery firm. Both believed there was a pressing need to bridge the gap between the highly sophisticated but "ivory tower" statistical tools being developed in academia and the practical, business-oriented demands of real-world marketing organisations. IUG was established to fill this gap, and soon became well-known as a proponent of innovative solutions to packaged goods companies throughout Germany.

Over the next decade, the firm expanded its range of services into other categories, including pharmaceutical, durables, financial services, and telecommunications, at the same time extended its activities to all of Western Europe and North America. Thirty years later it boasts offices on three continents but proudly maintains its independence and dedication to customer service.

IUG has pioneered a number of innovative solutions for positioning, copy-testing, ad tracking, new product development, and brand equity. Of particular relevance for this proposal is our CapSize model for new product evaluation cited above. A more complete description follows . . .

***

If awarded this project, IUG would assign a team of professionals including Rolf Jäger, head of our FMCG division; Susan Dwight, VP, who heads one of our FMCG groups; and Lori Cohen, Coordinator. In addition, members of our sampling, field, and data processing sections would be assigned to the project.

Mr. Jäger would have overall responsibility for the project and would be instrumental in designing the study and interpreting the findings. Ms. Dwight would be the day-to-day project manager and primary contact. She would be supported by Ms. Cohen who would serve as a back-up contact.

Credentials of all three individuals can be found in the Appendix.

Timing and Budget

We estimate the project will take about 12 weeks to complete and is expected to follow this series of steps:

Task		Elapsed Time
Finalise project design and sample specs	1 week	1 week
Draft screener and questionnaire	2 weeks	3 weeks
Program CAPI questionnaire, receive final stimuli	1 week	4 weeks
Pre-test, recruit, and conduct interviews	3 weeks	7 weeks
Coding and data processing	1 week	8 weeks
Analysis and report presentation	3 weeks	11 weeks
– Delivery of top-line report (1 week)	1 week	
– Delivery of final report (2 weeks)	2 weeks	
Presentation	1 week	12 weeks

The total cost of this project, based on the assumptions expressed in the RFP and this proposal, is € 57 000, and comes with a 10 % contingency. This figure includes all fees and expenses including travel, incentives, and other out-of-pocket expenses.

Payment terms are 40 % upon authorisation, 30 % upon completing field work, and the remaining 30 % upon submission of the final report.

THE CONTINUAL BRIEF

As noted at the beginning of this chapter, the degree of variation in both RFPs and proposals is huge, and the only things that are really critical is that the client communicates its needs clearly and the supplier's response meets the expectations of the buyer. Most of the chapter has been devoted to written documents between the two sides, and has emphasised completeness and a somewhat formal style as might be exchanged between parties that have never worked together before. In many cases where the company and firm know each other well, certain sections might be omitted or greatly abbreviated and shorthand bullets be substituted for sentences. Content, not form, should be the ultimate guide.

But the term "brief" can also be extended to the entire interchange between client and prospective supplier, much of which will be verbal such as phone discussions and meetings, or informal notes or e-mail messages passed back and forth. Here, too, the quality of information exchanged is far more critical than the form, and can be as important if not more so than the formal documents to the ultimate success of the project.

The underlying assumption is that the best research results from true partnerships between buyers and suppliers, and that open communications are an essential ingredient in establishing and maintaining such a relationship. Open dialogue between client and supplier before the project is awarded can initiate the partnership (with the winning supplier) early on, and provide the buyer with an additional method for evaluating all the bidders. This dialogue (or series of dialogues between buyer and various bidders) may be initiated before the proposals are delivered – maybe even before the RFP is sent out – and may last until the project is awarded.

Each party has one primary type of information to impart. If the background and objectives are the most important part of the RFP, these represent the most meaningful insights the client can convey. For the supplier to deliver a solution that truly meets the needs of the client, he/she really has to understand what those needs are. Often this requires an understanding of developments in the business, internal politics or other confidential situations that the buyer may be reluctant to put in writing. However, since this knowledge may affect the execution of a project in terms of its focus, analysis, interpretation, and even tone, the in-house researcher or commissioning agent may wish to fill the supplier in ahead of time – at least as soon as a project is awarded.

But it can even be helpful to make such information available before that, assuming a genuine need and level of trust in the supplier(s) since "hidden" agendas can also impact study design. For example, a supplier may bid on what appears to be a straightforward new product test assuming standard cell sizes and margins of error. However, if he/she learns that the test in question is anything but straightforward but a showdown between a brand manager who has already invested heavily in the idea and a marketing manager who doesn't believe in it, the design may be upgraded. Understanding the stakes, the test may become far more rigorous.

Suppliers in turn can utilise these less-formal channels to enhance the quality of their solutions by asking probing questions and making constructive suggestions. The buyer will benefit from a genuine give-and-take with his suppliers, even learning things that can improve

the study from those not selected. And the supplier will be able to enhance his/her credibility by demonstrating how well they can think "on their feet" and get on the same wavelength as the client.

Ultimately, the goal of the entire briefing process is a smooth transition into the next stage – the project itself – with as little of a disconnect as possible. Continuous interchange between the two parties is often the best way of achieving this goal.

REFERENCE

Esomar (2005) World Research Codes & Guidelines "How to Commission Research".