



Advanced Certificate in Market & Social Research Practice

AI in Research and Insight –

A guide to adoption, responsible practice and use across the
research lifecycle

*For researchers, insight teams, tutors, training providers and Advanced Certificate candidates
Product names are illustrative, not endorsements or approvals.*

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1. What AI adds to research, insights and analytics

AI can support repetitive, analytical and drafting tasks throughout a project, helping process information, explore options and communicate findings more efficiently. Its value depends on the 'professional practitioner in the loop', the research professional and their understanding of the research question, evidence, risk and organisational controls.

AI can support	Professional Practitioner expertise remains essential
Summarising documents and retrieving knowledge	Defining the business problem and research need
Drafting proposals, questionnaires and guides	Understanding research design and selecting and justifying the methodology Ensuring the question design and the overall questionnaire/guide are fit for purpose
Cleaning, coding and categorising data	Protecting participants and assessing research quality
Finding themes, patterns and sentiment	Interpreting context, nuance and contradictory evidence
Producing first drafts of reports and presentations	Approving claims, recommendations and final outputs

CORE PRINCIPLE

AI should enhance professional research expertise, not replace it. Research and insight professionals retain responsibility for purpose, method, evidence, ethics, interpretation and final decisions.

A simple capability model

Capability	What good practice looks like
Understand	Explain core concepts, realistic applications and limitations.
Apply	Use AI for a defined task with suitable data, instructions and tools.
Evaluate	Check accuracy, evidence, bias, relevance, validity and reliability.
Govern	Protect data, document material use and retain accountable professional practitioner review.

CORE PRINCIPLE

Start with the research objective, not the technology. Compare AI-assisted and non-AI options, then choose the approach that is fit for purpose and proportionate to the risk.

2. AI across the research lifecycle

The same quality, ethical and methodological standards apply whether work is manual, automated or AI-assisted.

Research stage	Possible AI contribution	Essential professional practitioner checks and responsibilities
1. Problem definition	Help to identify the business problem, help to define and refine the research problem, clarify objectives, research questions and hypotheses; surface knowledge gaps.	Understand and confirm context, strategic relevance and stakeholder priorities.
2. Research design	Help to decide on the structure of the research, the type of data, method of data collection, draft questionnaires, discussion guides, screeners and alternative wording; prompt bias checks.	Check design and method fit, validity, clarity, accessibility and participant experience.
3. Desk research	Retrieve, summarise and compare sources; extract themes and connect knowledge.	Verify provenance, currency, citations, evidence trail and missing perspectives.
4. Sampling and data collection	Help to identify and define the population of interest, recommend sampling design or approach or sampling plan, support recruitment, survey routing, chatbots, participant support and fieldwork monitoring.	Check sample design, review coverage, bias, consent, transparency, welfare, accessibility and escalation.
5. Data quality	Flag duplicates, suspicious patterns, speeding, fraud indicators and inconsistencies.	Treat flags as indicators; apply documented rules and review false positives before exclusion.
6. Qualitative data analysis	Support transcription, coding, theme extraction, sentiment and topic detection.	Preserve context, nuance, contradictions and minority views; validate against raw data.
7. Quantitative data analysis	Support pattern recognition, segmentation, forecasting and predictive modelling.	Check assumptions, statistical robustness, uncertainty and interpretability.
8. Insight generation	Draft summaries, findings, conclusions, opportunities, risks and recommendations.	Trace every claim to evidence; separate findings from interpretation and challenge conclusions.
9. Reporting	Draft reports, narratives, presentations and audience-specific versions.	Check narrative, numbers, labels, caveats, sources, disclosure, final story and sign-off.

10. Knowledge management	Search archives, retrieve prior work and connect evidence across projects.	Confirm permissions, provenance, relevance and appropriate reuse.
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3. Prompting and professional practitioner oversight

Prompting is structured briefing. It does not replace research design. A useful instruction makes the task, evidence boundary, method, constraints and review criteria explicit.

Prompt component	Include
Role and context	Research setting, audience and relevant background
Task	The exact work and output required
Evidence boundary	Permitted data or sources; require unsupported claims to be marked
Method or criteria	Coding approach, framework or quality tests
Output format	A usable table, checklist, code frame or summary
Challenge step	Uncertainty, missing evidence, bias risks and alternatives

EXAMPLE PROMPT

Using only the interview extracts supplied, propose a first-pass code frame. Define each code, cite the supporting extract, identify contradiction and uncertainty, and do not infer participant characteristics or motivations.

Control pattern

Workflow	Recommended sequence
Questionnaire drafting	Researcher defines objectives → AI proposes options → researcher reviews validity and bias → pilot → revise → approve
Qualitative coding	Researcher defines approach → AI proposes initial codes → test against data → revise code frame → validate themes → interpret
Data quality	Data quality rules agreed → system flags records → researcher reviews evidence → decision recorded → aggregate impact checked
Reporting	Researcher confirms findings → AI supports draft → evidence and tone checked → ethical or stakeholder review → sign-off

4. Responsible practice and governance

Responsible AI should be built into every stage, not treated as a separate final check.

Risk	Practical response
Hallucination	Inspect sources and verify facts, calculations and citations.
Bias and exclusion	Review representation, language, outcomes and different effects across groups.
Over-reliance	Use defined professional practitioner checkpoints and compare outputs with source material.
Privacy or confidentiality breach	Use approved environments, minimise data and follow permissions and policy.
Loss of context	Review raw material, contradiction, outliers and minority perspectives.
Weak transparency	Record purpose, tool, inputs, method or prompt, checks and material changes.
Automation error	Do not treat flags or classifications as final decisions; retain correction routes.

Minimum governance questions

- Which tools are approved for this data and task?
- What information may be shared, and under what permissions?
- Where will data and outputs be stored and processed?
- Be especially cautious if using Customer databases, Interview transcripts, Client information, Proprietary reports - i.e., analysis should always be done on a closed system.
- Which decisions require professional practitioner review?
- How will accuracy, bias, validity and reliability be checked?
- How will material AI use and changes be documented?
- What is the escalation route for unsafe, unsupported or inappropriate output?

EVIDENCE BEFORE FLUENCY

Polished wording is not evidence. Important claims must be traceable to source data or trusted references, with uncertainty and limitations made clear.

5. A practical adoption roadmap

Adopt AI through controlled learning, not wholesale transformation. Begin with low-risk tasks, measure value and strengthen governance before scaling.

Step	Action
1. Define purpose	Identify a real workflow problem and the result that matters.
2. Start small	Choose one or two low-risk uses, such as document summarisation, meeting notes or first-draft survey questions.
3. Build capability	Develop AI literacy, structured prompting, source checking and critical evaluation.
4. Set guardrails	Confirm approved tools, permitted data, storage, review and disclosure requirements.
5. Pilot	Compare AI-assisted and existing approaches for quality, efficiency, user experience and cost effectiveness.
6. Review and scale	Document learning, improve the workflow and expand only where controls remain effective.

Maturity model

Level	Characteristics
Exploring	Researchers learn core concepts and test individual low-risk use cases.
Adopting	Approved tools, documented workflows and team training are in place.
Embedding	AI is integrated across suitable processes with consistent governance.
Optimising	Knowledge systems, advanced analytics and continuous improvement are established.

6. Tool categories

Capabilities, terms, security and organisational approval can change. Verify current product information and policy before use with research data.

Category	Examples	Typical use
General AI assistants	Microsoft Copilot, ChatGPT, Claude, Gemini, Perplexity	Planning, drafting, summarisation, synthesis and first-pass analysis
Survey and research platforms	Qualtrics XM, SurveyMonkey, Genius, QuestionPro, Typeform, Forsta	Survey design, programming, routing, collection and automated insight
Qualitative and text analytics	Thematic, NVivo, Caplena, MeaningCloud	Coding, themes, sentiment, topics and open-ended analysis
Analysis and visualisation	Power BI, Tableau, Q, SPSS, Python	Statistical analysis, dashboards, segmentation and reporting
Data quality	Research Defender, Imperium, Forsta quality tools, Qualtrics quality features	Fraud, bots, duplicate responses, speeding and monitoring
Consumer and social intelligence	Brandwatch, Talkwalker, Meltwater, Sprinklr, Synthesio	Online conversation, media and customer perception analysis
Knowledge management	Stravito AI, Microsoft Copilot, Glean, Guru	Research retrieval, repository search and organisational learning
Automation and advanced development	Power Automate, Zapier AI, OpenAI API, Azure OpenAI, Hugging Face	Workflow automation and bespoke research applications

Product names above are illustrative examples. Inclusion should not be read as endorsement or approval for use with research data or for the completion of the MRS Advanced Certificate.

SELECTION OF AI CHECKLIST

Check tools for research fit, evidence needs, data classification, permissions, security, explainability, accessibility, cost, professional practitioner review and exit arrangements before selecting a tool.

7. Project checklist

Use this before approving an AI-assisted research activity or output.

Check area	Ready when
Purpose and fit	The AI contribution is linked to a defined business problem and its research objectives and compared with alternatives.
Design and methods	The underlying research design and methods are clear; the product is not treated as the method.
Data and permissions	Inputs are necessary, authorised and handled in an approved environment.
Evidence	Material claims can be traced to data or trusted sources.
Quality	Accuracy, validity, reliability, bias, uncertainty and relevance have been reviewed.
Professional practitioner oversight	Named suitably competent practitioners are responsible for research design, review consequential decisions and retain final accountability.
Transparency	Material AI use, checks, changes and limitations are documented appropriately.
Reporting	Numbers, labels, caveats, sources, confidentiality and audience fit are checked.
Assessment integrity	Where relevant, work remains independently produced and permitted AI use is acknowledged.

FIVE QUESTIONS TO CLOSE EVERY ACTIVITY

What did AI contribute? What could it not determine? What evidence supports the output?
What checks and safeguards were applied? Who remains accountable for the final decision?