

The Great Change Accelerator

Client & Partner Perspectives on the Future of Insights

Global Client & Partner Series of Roundtables hosted by:





As part of a newly formalized partnership, the UK's MRS (Market Research Society), The Research Society (Australia), and US-based Insights Association recently hosted roundtable discussions with leaders on the provider and client side to talk candidly about the many critical issues they face.



These virtual roundtables were conducted in two separate sessions and included a diverse set of 30 leaders from amongst the most innovative and influential brands and agencies. They discussed their challenges in 2020 and their thoughts on what lies ahead.

Many themes emerged as insights leaders on the provider and client side shared their goals and the demands they face.

Let's dive in - beginning on the **Client Side...**

Client Themes

As for all of us, it has been a time of rapid change and quick adaptation for those working within corporate insights departments. When the COVID-19 pandemic hit, brands were awash in uncertainty and desperately needed to get a handle on the mood of their customers and on what and how to communicate with them. It was a stressful time. Corporate insights teams were extremely busy. But they were in demand - and that's not a bad place to be.



CLIENT THEME 1

Insights Has a New Seat at the Table - *Can we keep it?*

Seemingly overnight, the insights function was considered the window to the world - a place where elusive visibility might be gained. Not just marketing, but the entire C-suite in organizations clamored for information: real-time data and insight about customers and their mindset. Intelligence also was sought for specific markets - how was the competition responding to this unprecedented time?

Some corporate insights leaders in our roundtables reported that research became the center of their organization rather than an adjunct to marketing. Insights was viewed as crucial and a focal point in the business. Corporate insights leaders soon found that not only did they need to secure current, essential data for departments across the organization, but they also must prevent executives from drowning in the waves of information that soon began to flow about the pandemic.

They needed to ensure leaders were not distracted; ensure the business continued with essential tasks and direction. They needed to filter out the noise, to curate - often with the help of providers - the information that required urgent attention and could inform immediate decision making.

Appreciation for their expertise surged and insights teams began getting more questions, different questions. Requests to help with operations or sales predictions, for example. Things that were not brought to them in the past.

By providing this help, insights teams enabled the rest of the organization to forge ahead with regular work. This has not gone unnoticed. Clients report feeling valued and empowered.

"As a team, we feel we can push back when being asked questions that are off topic," one researcher said. "We're not feeling like order takers."

So, it appears that inside some brands, insights has secured its coveted "seat at the table". But as they say, be careful what you wish for. It's not going to be easy to keep that seat. Like a game of musical chairs, it can get frantic when the music stops - especially when you're not paying attention, when you're out of step or out of touch. *Can we keep our seat at the table?* Yes - if we keep our ears and eyes open, go that extra mile to recommend tangible action and not simply data, and be willing to reach beyond our traditional scope of work.

The Move to Strategic Foresight

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JOIN THE CONVERSATION
TELL US WHAT YOU THINK

CLIENT THEME 2

The Move to Strategic Foresight

Evolving to provide different kinds of insights is what this pandemic has forced many to do. Corporate researchers we heard from are being challenged more now to consider what the brand should do tomorrow and next year, rather than report on what happened yesterday.

Research and insight have too often been focused on past behavior; they say. For the past 18 months we have seen a shift of focus to looking forward. This was disrupted to a degree during the early stages of the pandemic, as you can imagine, but this has only proved temporary.

Strategic foresight has once again been brought forward as a priority.

In fact, the pandemic has accelerated some of this work. General business plans, for example, something that had been years off on timelines, have been implemented fully within three months. In several organizations, there has been a drive to couple strategic foresight with present-day insights.

Agility is important, researchers note, but strategic planning is essential.

So, insights leaders are being asked to use data as a dynamic forecasting tool to help the organization scenario plan around growth and investment planning. Important decisions about when to spend, where to spend, and how to spend. Researchers are actively reviewing behavior change models. Looking at change motivators is a key aspect of current work. Overall, insights must perform at the speed of decision making in the board rooms – that's the only way they can keep their seat there.

An Understanding of the Agility Goal: Cooperative Iteration

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CLIENT THEME 3

An Understanding of the Agility Goal: Cooperative Iteration

What is driving successful insights teams to evolve is the need to deliver answers quickly – and to do that, they take pride in being agile and working in concert with others in their organizations. The pandemic has amplified the need for both agility and speed.

This was most obvious with the quick pivot to online tools when face-to-face research and focus groups were suddenly not available. Researchers report doing more digital ethnographies and video qual now. They also have been forced to find creative solutions to do other work online – mocking up products, for example. Success with this quick adoption of online qual tools has led clients to be more willing overall to try new technologies. Rapid iteration and agile ways of working is not necessarily about the “sprint”, but more about collaboration.

The time and resource crunch forces quick decisions. What requires rapid iteration and when is more time needed? It has been a challenge to focus on priorities and what will in fact make a difference. With planning cycles shortened – when is “good enough” enough?

There is need to encourage stakeholders to accept alternate types of evidence – including less robust evidence – but still evidence none the less, according to some of the corporate researchers in our groups.

Organizationally, the push to quickly gather insights has broken down silos as teams work more often together with a more company-wide view. In some corporate departments, teams were split to focus on immediate, medium- and long-term projects to feed the pipeline. Learning and iterating together is a positive development noted by many.

A Demand for Continuous Learning

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CLIENT THEME 4

A Demand for Continuous Learning

Agile iteration is resulting in a new world of continuous learning. This new normal is more fluid, as is the role of insights, and so, too, researchers must be open to changing what they do and how they do it. Insights professionals may wish to be viewed as the “voice of truth” but are realizing it’s okay to change their mind when more information is made available.

Corporate researchers noted a recent change from being the “Oracle” to the “Music Conductor”. They mentioned that sometimes there is a need to retrain team members and partners to deliver the “quick and the strategic”; that some of the resistance against speed is from within. To get into a new mindset we have to change our own fundamental core professional roots – research does not need to be traditional; long and academic is not always needed. What do you need to know now? – that is paramount. This move to an experimental mindset is fascinating. And we are curious to see if it will become a new norm.

A Need to Know Which Changes Will Stick

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CLIENT THEME 5

A Need to Know Which Changes Will Stick

We heard from all clients that they have a real need to separate the temporary from the permanent. What consumer changes are forced and will revert? What changes are embraced and will stick?

They are looking for behavioral expertise that will guide them in their strategic foresight planning based on changes that will last. Where should they invest lightly to solve short-term customer needs, and where should they invest heavily in long-term improved experiences prompted by new habits that will endure?

These are complex questions that require evidence and clarity. And our industry must be up to the challenge. The mindset and behavior of consumers has changed – that’s no secret. But for each product and service those changes – and the motivations behind them, be that fear or convenience, vary widely.

Understanding which behaviors will manifest in permanent change is among the top priorities of many brands. The drive to understand consumers – to be consumer or people-centric – has intensified as organizations seek their place in the “new normal”.

This has corporate researchers looking closely at things like authenticity. With the pandemic taking a toll on the financial, physical, and mental health of some customers much more than others, how do brands strike a balance? Deliver messages in an understanding, considerate tone? How do they design customer experiences, map customer journeys, and position the brand in ways that are authentic and instill trust?

Managing the brand requires a human connection. This has moved the insight function to a more central point within the business. Empathy for the customer has become much more important and a more complex task. Especially when we are now interacting at a distance – how do you better understand your customer when you don’t have proximity to them?

Partner Themes

Much has changed on the client side and yet many ongoing challenges remain. They have always been stretched thin and are asked to do more with limited resources. This has only accelerated during the pandemic. In seeking help, they are relying more on their service partners. Let's take a look at what partners are seeing in their world...



PARTNER THEME 1

Highly Consultative Engagements

Research service providers note that clients are leaning on them more during the past several months, asking them to truly work as part of their teams. This is especially true at organizations where the insights function has been reduced due to the economic strain. In some cases, partners are located within the client's businesses and attend meetings with client-side stakeholders.

Partners are being asked to engage earlier and more intensely in the research process. Getting involved at the outset to help their clients determine what to ask, when, and how to rethink staying connected to consumers is viewed as a welcome change. This will prevent missteps later in the process, increase speed of delivery, and result in higher quality data.

The client-supplier relationship could have become very transactional as a result of COVID-19, but the need for partnerships has in many cases strengthened the bond. Research service providers with existing relationships stand to benefit from this trend.

Existing vendors, who are trusted and know the client business, know when the client is out of their comfort zone and can act accordingly. Working with established partners also limits training, allows for quicker turnaround and often more comfortable, deeper consultive engagements.

Clients are looking for partners that help with ideation, have deep industry knowledge, are flexible, reasonable and up front with pricing, and think ahead about what they will need. They keep them informed about news in their industry and abreast of larger market trends.



PARTNER THEME 2

Organic Business Processes

Committed to existing structures, clients need partners that can help them optimize their current resources and existing data. They also benefit from candid assessment of ongoing or planned research projects - what is sensible to continue and what isn't?

Part of the collaborative process for partners is the ability to point out and leverage value and opportunity within the established structure. The ability to summarize large volumes of data to achieve insight.

Evidence: It Comes from Everywhere and All Types of Data

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PARTNER THEME 3

Evidence: It Comes from Everywhere and All Types of Data

Dumping more data on clients doesn't add value. Evidence is what matters and that means working in more secondary and non-survey data, using social media insights in a supporting, not starring role, and leveraging existing data.

Other areas gaining traction that were noted: Providing digestible, bite-sized data that internal business partners can take away and use in tangible ways.

Trackers were already becoming less relevant. This trend will accelerate with the move to real-time, bite-sized data for different users within brands and businesses.

Providers also say they are focusing on what clients can specifically do with the data and delivering it in compelling, easy-to-understand ways.

Time to Rebuild the Models

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PARTNER THEME 4

Time to Rebuild the Models

The pandemic has impacted service providers to the extreme - those specializing in online qual technology for example, grew quickly and have needed to scramble to staff up and service clients. Meanwhile, those focused more on in-person qual have needed to pivot and partner to provide clients with the remote connection and solutions they require.

Some providers are working to rebuild their models by developing products and services to help curate insights from the data deluge; adjusting to shorter planning cycles by doing small tests, more frequently, which can be implemented immediately. Providers also are embracing the move to DIY, providing clients with more robust self-serve options, such as dashboards, that can be managed and customized by clients to meet their evolving needs.

Keeping Talent "Plugged In" to Changes with Clients & Consumers

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PARTNER THEME 5

Keeping Talent "Plugged In" to Changes with Clients & Consumers

Looking internally at their teams, service providers say they have rethought employee mentoring, training, and skill building based on the move to virtual work and all of the changes in client needs. Losing client connection was a real concern when the pandemic began, but that has eased. Providers report that they have gotten to know their clients in a much more personal way via video conferencing. Working through common challenges such as working from home and the isolation of lockdowns have enabled more personal connections.

Providers also report there is no time to do big projects - therefore there is more focus on deconstructions of existing segmentations, building upon existing knowledge and trends, and adding customized elements.

Tracking studies and other research relying on past behaviour to predict future action has been completely upended with the "hard reset" brought on by the pandemic.

Shared Concerns

There was much overlap in the areas of discussion from providers and clients. That was good to hear as it bodes well for continued cooperation and collaboration – much needed to tackle the challenges they share.



SHARED THEME 1

COVID-19: The Change Accelerator

Everyone agreed that while not many completely new trends and themes emerged, COVID became a change accelerator, dramatically speeding up the evolution of their products, services, strategies, and technologies.

Among the topics noted in the “Change Accelerator” – The need for insights professionals to let go of some of their core requirements. To not always focus on “the nugget” but also look for and highlight the “signals” in the data which can provide a 360-degree of what is happening.

SHARED THEME 2

Industry Language Barrier

Clients and Partners also agreed that we have an industry-wide language and lexicon barrier. Proving ROI, defining agility, defining quality, and talking about the role of insights professionals and the tools used can create more ambiguity than clarity.

Clients shared with providers areas where communication and understanding can improve:

- There is a gap between supplier’s offering and client’s needs; those that are being used are those that have adapted to the client’s insight needs.
- Learn when it’s best not to respond – giving a wrong answer does not help in the long term; just say you don’t know yet.
- Don’t merely focus on the “hottest new trends”, consider the client’s wider corporate strategy and whether these trends fit that strategy. Leading with a pitch for new research tools will fall on deaf ears.
- Expectations of clients has increased. Basic and solid research is not what is needed – adaption and value added is what is wanted.
- Suppliers who ask the question “what is it that you need us to do” – are the best partners to work with.



SHARED THEME 3

Do More with Less

Everyone, no matter the role, company, or approach, is faced with the challenge of accomplishing and delivering more with less time, money and resources. The drive to achieve more with finite resources appears universal across the business world. Providers understand their clients are working toward that goal.

Clients, too, must understand the stress on their providers and must realize that data quality or speed may suffer if pricing is to be reduced.

Some advice from clients for their peers...To better prioritize resources, determine what is transactional and what is strategic. Farm out transactional and focus internal resources on strategic, more important work. DIY is not the golden key, it is a tradeoff. It gives you flexibility, but it sucks time from our team.



SHARED THEME 5

Improved Data Technology, Stacks & Protocols

Finally, to accomplish all of these discrete and shared goals, we have to improve our data ecosystems, improve the utility of data, and ensure strong governance and privacy. Before starting a project, ask stakeholders how the data will be used and stored internally, and what data already exists and can be brought in rather than asked. New technology needs to integrate with what the client already has. Providers and clients must recognize the need to better understand integrations, tools, and protocols to speed up the adoption and utility of data.



SHARED THEME 4

Broaden Our Voice and Reach

There was a deep alignment on the need to broaden the voice of research. Broadening both the kinds of voices heard, and the impact of those voices. Diversity is needed across teammates and partners with insight as the “conductor”. We need more inclusive research, data and evidence. We also need insights that more accurately reflect the entirety of society. Broadening the types of research, data, and teams will increase our industry’s impact.



Final Thoughts...

The demand for businesses to quickly transform themselves, to track the consumer mindset “in the moment” and adapt messaging accordingly has required real-time data and insight. With that, insights will be elevated to an essential function if executed correctly.

With the potential to contribute to the organization in so many meaningful ways, the temptation is to try to do it all – to have your team take it on and own it.

Sage advice from a researcher in our forum: it requires a lot of discipline not to try and do everything but instead to organize and structure what needs to be done, by whom and what this will deliver to the business. Spreading the wings of your team, challenging them to excel and contribute in new ways is great. But be careful not to overreach.

As we enjoy a greater appreciation for insights. Let us not forget to quantify as best we can the value of insights. Measure ROI and communicate it across the organization. This is the only way to protect the budgets, demonstrate relevance and the vital role of the insights function within a brand and a business.

Roundtable Participants

ROUNDTABLE 1

Facilitator:

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From MRS UK:

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Greg Clayton: Ipsos MORI

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Jackie Chan: Prudential

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Khary Campbell: L'Oreal

Gary Laben: Dynata

Stacy Bereck: GfK

Melanie Courtright: Insights Association

From The Research Society Australia:

Melissa Pellegrini: Coles

Peter Harris: Potentiate

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ROUNDTABLE 2

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From MRS UK:

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Georgie White, BT

Steve Phillips, Zappi

Vanella Jackson, Hall & Partners

James Endersby, Opinium

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