





# Project Management Training Series

Module One  
Addressing Client Problems

# LOGISTICS

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# Today's Presenter

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**Marketplace Measurement Worldwide**



# I. Addressing Client Problems

- Why do companies conduct and commission marketing research?



# I. Addressing Client Problems

- Why do companies conduct and commission marketing research?
  - To improve decision making by
    - Reducing Risks
    - Identifying Opportunities
- Most of the effort is toward risk reduction
- What separates the great from the good is opportunity identification!





# I. Addressing Client Problems

- Types of Client Departments – There's a lot in a name
  - Market(ing) Research
  - Market(ing) Information
  - Market(ing) Knowledge
  - Market(ing) Planning
  - Market(ing) Insight
  - Market(ing) Intelligence
- Some combination of the above

# I. Addressing Client Problems

- Name gives clues to department's orientation
  - Market focus vs. Marketing focus
  - Active (Research, Planning, Insight, Intelligence ) vs. Passive (Information, Knowledge)
  - Strategic (Planning)
  - Episodic (Insight)
  - Continuous (Intelligence)



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- Client research departments can be centralized, decentralized or hybrids (e.g., central function but decentralized deployment.)
  - Can report to marketing or a staff function
  - Some emphasize objectivity (centralized / staff function), others involvement (decentralized / marketing). Most say they do both?
  - All are involved in design, analysis and reporting of results but in varying degrees with varying demands on research companies
  - Tend to undertake only a small amount of their own data collection and processing and rely heavily on research companies.

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- While it varies somewhat by industry, typically primary research is only one department activity to help improve decisions
  - Marketing Information Systems (MIS) - syndicated and secondary data sources
  - Modeling & Advanced Analytics
  - Qualitative Research
  - Survey Research



# I. Addressing Client Problems

- What are some of the questions that client research departments must answer for their constituencies?
  - Who are my customers/prospects and how/why are they using my products and my competitors'?
  - Are all my customers the same? Do they have different needs? Are some more valuable than others?
  - How valuable is my brand? Do people know it and like it? What attributes and benefits do they associate with the brand? How does this compare to competition?
  - How can I differentiate my brand most effectively?



# I. Addressing Client Problems

- What are some of the questions that client research departments must answer for their constituencies?
  - What are my opportunities to introduce new products into the market? Which ones will be most successful? How successful?
  - How well is my advertising working? Is it memorable, understandable and persuasive? How does it perform vis-a-vis competitors?
  - Are my customers satisfied? Are they loyal? Will they recommend my products/services?



# I. Addressing Client Problems

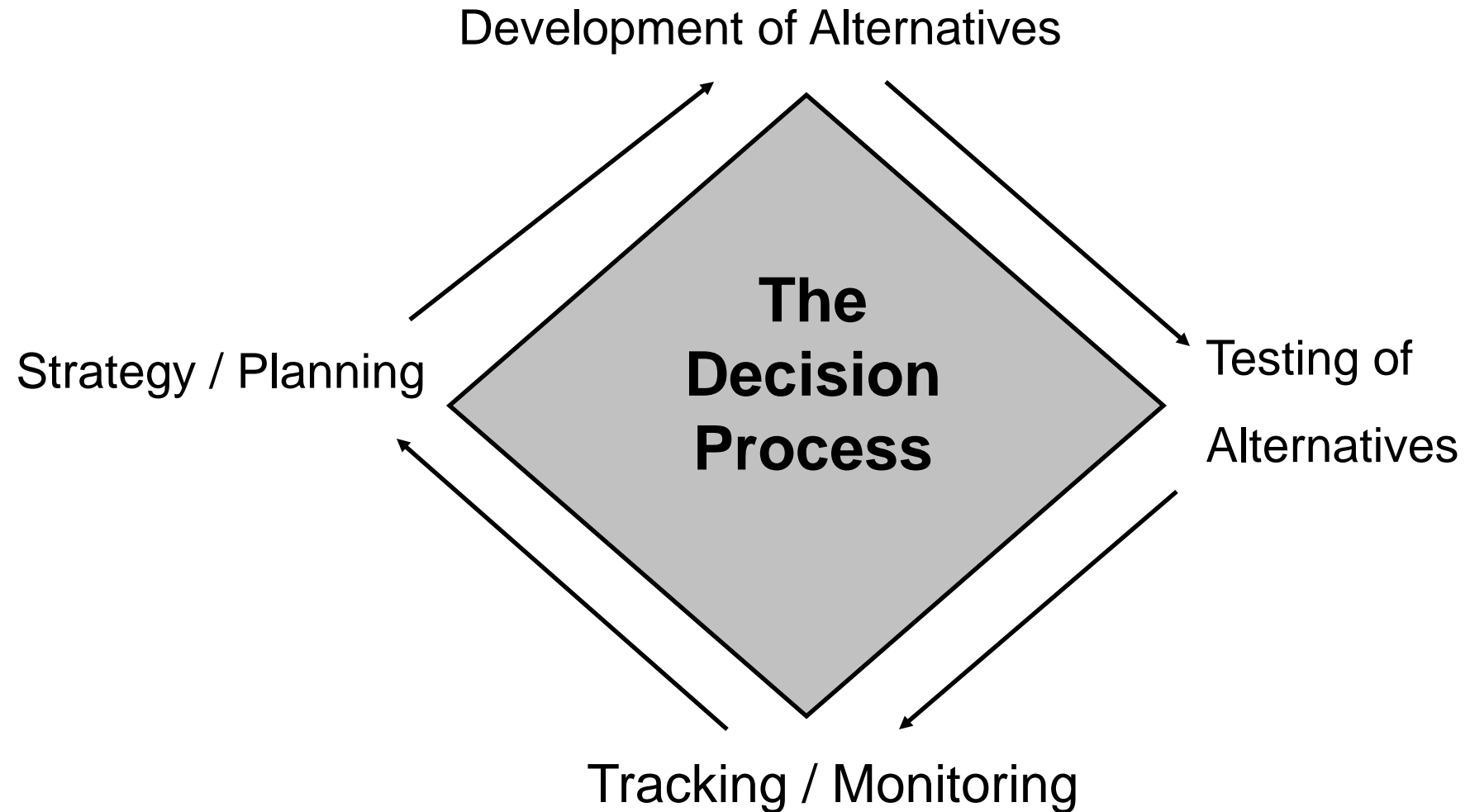
- How do you need to think about these questions? What context needs to be applied so that they can be systematically addressed?



# I. Addressing Client Problems

- How do you need to think about these questions? What context needs to be applied so that they can be systematically addressed?
- Regardless of industry, marketing research tends to be applied at a series of junctures in the decision process?
  - Strategy / Planning
  - Development of Alternatives
  - Testing
  - Tracking / Monitoring
- This decision process is ongoing and sometimes a little like “chasing your tail.”
- It serves as a convenient way to deal with and address the questions which get posed to the client researchers and their research companies.

# Research Interaction with Marketing Decisions





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- Strategy / Planning
  - Shapes the “in going intentions of the Marketer.” How they are going to approach the market?
    - Source of Business – Expand the category or cultivate users of other brands
    - Market Target – Paint a picture of who you are addressing. Focus on their ABC’s (Attitudes, Behavior, Characteristics)
    - Frame of Reference – How do we want to be perceived? How do we define our competitive milieu? May be broader than a category definition.
    - Point of Difference – What advantages do we have over alternatives? May be attributes, functional benefits or emotional end benefits.



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- Which types of studies are intended to answer these strategic questions?

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- Which types of studies are intended to answer these strategic questions. They may go by somewhat different names but the essence is the same.
  - Attitude and Usage (A&U, U&A)
  - Market Segmentation
  - Brand Equity
  - Brand Positioning
- They each, however, take a slightly different tack at addressing the strategic issues.
- Often the strategic studies conducted are a composite of these orientations.

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- Attitude and Usage studies – key questions:
  - Who buys the brand?
  - Who uses the brand?
  - When is the brand used – occasions, frequency?
  - How is the brand used – by itself, in conjunction with other things?
  - Why is the brand used – needs?
  - What does the brand deliver – utility, cost saving, prestige, safety, etc.?
  - How does the brand compare with competitors?
  - Demographics

Deliverable: Understanding of how customers interact with the brand

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- Market Segmentation – key questions:
  - Brand awareness and familiarity
  - Brand spending
  - Brand usage
  - Needs fulfilled by brands
  - Brand imagery
  - Demographics
  - Psychographics
  - Media usage

Deliverable: Marketing segmentation scheme that will drive messaging strategy, media buys and new product development.

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- Brand Equity – key questions:
  - Brand awareness (unaided and aided) and familiarity
  - Brand ratings – overall
  - Brand loyalty
  - Likelihood to recommend brand
  - Brand evaluations on benefits delivered vs. competitors
  - Demographics

Deliverable: Understanding of brand stature in the competitive marketplace.



# I. Addressing Client Problems

- Brand Positioning – key questions:
  - Brand awareness and familiarity
  - Brand ratings – overall
  - Importance of brand attributes and benefits (tangible and Intangible)
  - Evaluations of brand and competitors on all attributes and benefits
  - Demographics

Deliverable: Understanding of how to communicate brand's differentiating competitive strengths and address important competitive weaknesses.





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- New product research is a specialty that has multiple steps:
  - Idea Generation
  - Screening
  - Evaluation/Forecasting
  - Communications Testing

# I. Addressing Client Problems

- Development of Alternative Product Concepts:
  - Generation of ideas – usually brainstorming techniques or qualitative research (focus groups and individual depth interviews)
  - Screening – multiple judgments per respondent (sort and rank ideas, round robins, balanced incomplete block designs)
    - Control for carry over and sequence effects either analytically or by rotating first position
  - Evaluation – typically monadic concept and concept/ product tests.
    - Pre Test Market Volume Forecasting – trial and repeat estimation

Deliverable: Specific guidance on which new products to introduce and estimates of potential sales volume.



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- Testing
  - Product / Service
    - New Products
    - Cost Reduction
    - Product Improvement
    - Competitive
  - Choice of technique relates to the decision at hand
    - Cost reduction – risk to current franchise suggests a very sensitive paired comparison type of test
    - Product improvement – often involves increased cost. Therefore you want to be sure the product is superior. This suggests a monadic design
  - Balance errors of commission and omission ( Type I & Type II errors)
    - Learn, brush up on your stat!

# I. Addressing Client Problems

- Testing
  - Communications pre /post
    - Concepts
    - Ads / Commercials
    - Websites / Display Ads
  - Criteria
    - Memorability - Is it remembered?
    - Communication – Is it understood?
    - Persuasion – Is it 'moving the needle'
      - Overall
      - On key strategic benefits
    - Affect – How well liked is the ad/ concept / commercial itself?

Deliverable: Recommendations to maximize effectiveness of advertising

# I. Addressing Client Problems

- Tracking / Monitoring – “Knowing where you’ve been helps you plan where you are going.”
  - Concepts
  - Ads / Commercials
  - Websites / Display Ads
- Communications and Customer Satisfaction.
  - Both a report card and a strategic assessment tool
  - Your brand only or vis-a-vis competition
  - Continuous or point-in-time
  - Integrate spending information in the analysis
  - Model the relationships



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- You have to “look through the rear view mirror” for a while to understand where you are and what is achievable.
- The “acid test” is when you start using the study to set planning and performance goals for communications decision making and in the case of customer satisfaction compensation.

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- Communications Tracking – key questions:
  - Unaided and aided brand awareness
  - Unaided and aided ad recall
  - Message recall
  - Media recall
  - Brand familiarity
  - Evaluations of brand and competitors on attributes and benefits tied into message strategy
  - Likelihood to consider/buy/recommend brand
  - Demographics

Deliverable: Understanding the effectiveness of brand communications in driving sales.



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- Customer Satisfaction/Loyalty/Advocacy– key questions:
  - Confirmation of customer status/most recent contact/purchasing volume
  - Overall satisfaction with the brand
  - Overall satisfaction with the brand experience
  - Importance of brand purchasing and customer experience variables
  - Brand delivery on these variables
  - Likelihood to repurchase and recommend brand
  - Demographics

Deliverable: Prioritization of actions that will increase satisfaction, loyalty and advocacy.



# I. Addressing Client Problems

- Closing thoughts
  - Keep focused on client's needs. A research firm's products and processes mean nothing if they are not addressing client problems.
  - Opposite tensions always exist between what is best for the client and what is best for the research firm. For close calls, doing what is right for the client is seldom the wrong choice.
  - Sometimes clients are not clear about what they want. We hope the frameworks discussed today will help in probing for clarification.
  - Even difficult clients are fundamentally smart. They chose you.



# Project Management Series

Addressing Client Problems