

THE BUSINESS OF RESEARCH: YOUR FIRST IMPRESSION MIGHT BE YOUR LAST

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There are research firms from Anchorage to Tampa, from Providence to San Diego. All of them want business. Most of them are competing against other vendors in the same general location or area of expertise. Yet it's amazing sometimes how little thought research firms seem to put into getting the business of potential clients – even when that client is making the first contact.

Contact any five research companies, and the chances are that at least one of them will make a rather poor first impression. For many clients, this is the only impression that will be necessary, because the proposed business will go to a competitor.

Take it from someone who has made first contact with all too many companies: there are ways that vendors communicate very clearly the quality of the work they are likely to do, even in this first contact. As a client or as a vendor, here are some things to look for.

Knowledge of the client's expectations and needs. Vendors sometimes assume that all clients want the same thing, whether that is low price, in-house RDD sample, or great food during focus groups. While you spend your time hyping how low your costs are, your potential client may be wondering about the level of service she'll receive or your company's experience in her industry. I've been insulted by vendors who want to sell me on their focus group facility solely because they cater gourmet meals and are within 20 minutes of three championship golf courses. I'm there to do serious research, not to eat eggplant parmesan and play 18 holes! Yet other potential clients may find these aspects very important.

Like any good marketer, you need to find out what your target wants, and give it to him or her, whether it's details on your financial industry research experience or a list of local luxury resorts.

The quality of the communications. *What you say* is important, but *how you say it* and *how it looks* are also vital. I once rejected a bid from a potential vendor because it had a typographical error...in the letterhead! If the company could let something that major get through without noticing (or could notice it and not care), what are the chances that the work they do will show any attention to detail?

Open any edition of The GreenBook from the AMA and you'll see at least one or two advertisements that look as if they were designed by an eight-year-old and faxed in at low resolution. Promotional literature and advertising doesn't have to be four-color, glossy, and expensively produced to communicate that the research firm is a quality organization. But using poor grammar in a cover letter, spelling the client's name wrong, providing brochures that are yellowed, worn, or written on, or sending out something that just looks like poor quality clearly communicates the kind of work the client can expect. This applies to telephone communications, as well. A convoluted voicemail system or an unprofessional receptionist gives a very poor first impression. The last thing a client wants to hear is, "He's too busy to take your call. He'll have to call you back tomorrow."

The amount of information available. Some vendors seem to have a thoughtful answer to almost any question. Others apparently can't believe they're being asked questions. Clients will often want details. What tab package or statistical software is being used? What are the demographics of the area from which a focus group facility can recruit? What respondent incentives are necessary in this market? How many clients can fit comfortably in a viewing area? What is the interviewer-to-supervisor ratio of the field center? What are the focus group room sizes? These are all questions that should be relatively easy for a research company to answer. Yet all of them have, at one time or another, completely stymied the representative of a vendor with whom I've spoken. If the firm can't or won't easily answer questions such as these, a client is likely to go to another vendor that knows its business more completely.

The level of service the client can expect. One of the most important things research vendors are paid for is service: service in recruiting or interviewing, service in confirming respondents or validating interviews, service the night of the groups or the day of the presentation. Vendors that don't return calls, don't meet bid deadlines, are rude or indifferent on the phone, provide only partial information, are unwilling to follow the parameters of the request for proposal, or make sure to tell the client everything they can't do rather than what they can – all are supplying very strong hints of what the service will be like during the project. If a client sends an RFP that requests a bid, a timeline, a client list, and a local map, that is what she is expecting to receive. Either fulfill her request or tell her why you cannot. After being burned once by holding focus groups in what amounted to a closet, I've made a practice of asking for a facility layout and/or room sizes. It astounds me how many facility managers can't provide either, and aren't willing to take two minutes to pace off their rooms if they have to, in order to answer my question.

A focus group facility once provided me with a very nice reply to an RFP. Unfortunately, the reply came a week after the project had already been awarded and recruiting had started, even though the reply deadline was clearly noted in the RFP. I've even had vendors say, "Well, it would be a real hassle for us, but I guess we could work this into our schedule." By telling the client how busy you are, you run the risk of implying that you don't have time to do a good job on the project.

Research and market knowledge. Local or regional research specialists spend most of their time in Phoenix, or Pittsburgh, or New Haven – wherever their market happens to be. Clients often don't. Local vendors should know their market and know their business. If you don't know something, don't assume – ask the client, even if it's just in the bid process. I've had times when a vendor provided a bid that was twice as high as other bids on the same project, because they made an assumption about the population or the incidence. Had the vendor only called to ask a simple question, they might have had a reasonable opportunity to win the bid.

It's much better to ask a client questions every day than to have them show up at the facility and find a group of improperly recruited people munching on M&Ms and waiting to be interviewed. In a project for a religious organization, one vendor included Mormons, Catholics, Jehovah's Witnesses, agnostics, and other non-Protestant belief systems in a focus group that was supposed to be for evangelical and mainline Protestants only – just because the facility manager wasn't sure what "Protestant" meant and never bothered to ask.

Attitude about the project. Do you want the project? Then prove it! Don't be indifferent, condescending, unprofessional, or bothersome. Clients want calls returned promptly. They want questions answered accurately and succinctly. They want the vendor to be personable and easy to work with. They don't want to be bothered with calls every other day asking, "Have you awarded the project yet?"

I once had to send out an anonymous request for information on a highly confidential project. Vendors were provided only my personal name and fax number and asked to fax back general information on their firm (number of interviewers, industry experience, etc.). All but one vendor complied. The objector faxed back a snotty note informing me that if I provided my company name and a formal RFP, he would consider whether to fulfill my request. I was delighted to fax a reply that a formal RFP on about \$60,000 worth of research was being prepared and would be sent to all local companies that had provided the information – which was everyone but him.

Don't denigrate the competition. I sent a project out to bid once that received proposals with costs ranging from \$60,000 to \$80,000. One company faxed back a cost of \$110,000. When I called to make sure they had read the RFP correctly, I was informed rather condescendingly that, "We simply provide better service than your other vendors do. They aren't capable of doing this kind of work properly." The vendor didn't even know who my other vendors were. That will be the last RFP they receive from me. (Besides, for an extra \$30,000, I'd better be getting breakfast in bed every day as part of their "superior" service.) If you have an advantage over the competition, tell the client why you're so good – but not why other vendors are so bad.

Everyone works with service industries, from getting a mail survey done to having your car repaired. If you work at a research firm, think carefully about good and bad experiences you've had with service industries and salespeople. Try to emulate those you liked and avoid those you didn't when you are attempting to attract business from a new

client. If you are annoyed when your dentist's office doesn't return your calls promptly or when your real estate agent sends you a letter that includes three extra vowels in your last name, consider how much this annoys your clients when you do it to them.

There are scores of research companies out there. You're not always going to provide the lowest bid but you can always demonstrate to a potential client that you want his business and are willing to act as a high-quality service provider in order to get it.

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“Opportunity is missed by most people because it is dressed in overalls and looks like work.”

THOMAS EDISON



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