

THE KEYS TO USABLE RESEARCH

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Why do some non-profit organizations invest heavily in marketing research, while others of the same size are virtually inactive in this area? How can research be so vital to organizations such as World Vision and the American Cancer Society, who have very active research departments, and at the same time have little perceived use to other large organizations? Why do some smaller organizations have a full-time marketing research manager, while other small organizations don't use research at all?

The organizations which rely on marketing research have found it to be a reliable way of saving money, avoiding mistakes, understanding donors, and helping to plan for the future. But other non-profits have ventured into the world of marketing research, with the opposite experience – the research cost money rather than saving it, and it didn't help them in concrete ways. How could the two types of experiences be so different?

There are many reasons why research efforts can fall short of expectations. If you're part of an organization that hasn't done much research, but is considering it, this may provide insight to make sure your research efforts pay dividends. If your organization has been disappointed with marketing research, what you're about to read may explain some of what happened.

Lack of support within the organization. Research won't by itself change any company or organization – it is simply the pipeline through which your current, lapsed, and potential donors communicate to you. Your organization still has to be prepared to act upon the findings. Some organizations have expressed dismay because they did donor research, but their donations haven't gone up as a result. Often times this is because the organization did little to implement the study results, due to lack of time, lack of funds, or lack of support for the research.

If you're going to use research to investigate ways your organization might change and improve, your organization has to be prepared to make those changes. This means the research has to have internal support. Don't assume that you can do research and *then* get a skeptical board or CEO to make changes. There has to be agreement within the organization that the research will be taken seriously and implemented. If it isn't used, research *is* a waste of money.

Lack of a clear objective. Research is sometimes commissioned "so we can understand our donors better." While this is a laudable overall goal, it's missing the necessary details to make the research specific and useful.

A few years back, a \$50 million international relief agency had a disappointing research experience. "First of all, I don't think we had a clear objective," their Marketing Director remembers about the research. When they tried to form one, "we came up with too many objectives. It was, 'oh, well, since we have the focus groups, let's do this, and ask them this, and have them look at these pictures,' so it got very fragmented. There were too many competing objectives." Lacking a clear objective, the research uncovered bits and pieces of interesting information, but nothing they could strategically implement.

Poor research. Sometimes poor research results from people who simply aren't qualified to undertake the task. Other times, good people aren't given the necessary tools (e.g. budget, time, or authority.). Either way, this is a sure road to wasting scarce resources.

Especially if your organization doesn't already have a research department in house, you'll most likely be working with an outside consultant or company to conduct the research. It is crucial that the outside support you get comes from qualified, experienced researchers. Many fundraisers, direct mail houses, advertising agencies, and other consultants offer research as part of their services, because they want to offer clients full-service help. Some of these agencies have a qualified research person on staff (or contract with one). Some of them don't.

DeWayne Herbrandson, president of the consulting firm Herbrandson Associates, Inc., says his organization will help non-profit clients with research, but only through contracting with a qualified research supplier. "I don't feel like we have the expertise in that field to see that the research is set up correctly to get the right information from the right group," Herbrandson says. He feels this approach gives him an advantage with clients. "You're talking about bringing to the table another organization that has skills and expertise in that area, and generally no agency can provide expertise in every area."

Using a marketing research company is not a guarantee of getting qualified help, because your organization is in a highly specialized industry. The company might be terrific at automotive or banking research, but have no clue when it comes to non-profits.

A good researcher for your project will understand the non-profit environment, have experience in the type of research you need (focus groups, tracking studies, product development, etc.), be willing to answer your questions and spend time with you, and concentrate on research as a specialty, not as a sideline.

Sometimes, management doesn't provide the necessary tools and support for research. Any project should be done as inexpensively and quickly as is reasonably possible – but when constraints in time, budget, or authority mean the research won't really accomplish its goals, then don't do the project. The only thing worse than no research is bad research.

Esoteric, non-actionable research. It may be interesting to know that your donors read a lot, or own cats, or tend to vote Republican. But is it useful? Will it change the way you are doing things? You have limited resources to spend – spend them collecting information that will make an impact.

This is a shared responsibility between the researcher and the client. Both should constantly ask, "Do we really need to know that? How will that change what we're doing?" If the name of the organization cannot and will not change, don't waste money doing research on whether people would prefer other names. This may seem like an obvious statement, but it's amazing how much research is done because someone in the organization says, "It would be interesting to know..." rather than "We *need* to know..."

Unreasonable expectations. Even good, useful research can be seen as a failure in your organization if expectations aren't managed carefully (especially among people who aren't familiar with using research). For instance, sometimes research helps determine that sweeping changes aren't necessary in your organization; that things are pretty well on track right now. Actually, that's very good news. You're doing things right, and it's important to know that to move forward in confidence. Research that shows this is often labeled a waste, which is unfortunate. Which is preferable: spending \$10,000 in research to assure you you're on the right path, or spending \$10,000 in research to show you the organization needs \$500,000 worth of changes?

Overzealous proponents of research (both employees and outside consultants) can also oversell the benefits of research. Research – even the best research – won't guarantee fundraising success, predict the exact response to a marketing effort, make decisions for you, or by itself turn around an otherwise moribund organization. Research is a tool to give your organization knowledge and wisdom, and to be used in conjunction with intelligent marketing and strategy to lead the way to success. As valuable as it is, it isn't a magical cure by itself. Overselling the benefits of research is a sure way to have an organization do one research project, and no more.

Lack of partnership. When a consultant rolls in, does a project, drops a thick report on your desk, and moves on to the next client, the research experience is often a disappointment. Partnership in the project between the researcher and the non-profit organization is a must if you don't have substantial in-house resources to develop, interpret, promote, and use the resulting information. Your organization and the research company working together will provide a much stronger product than if you pass off the project to an outside firm and simply wait for the final report.

This responsibility falls on both the researcher and the client – the researcher has to understand your objectives well enough to provide guidance for your research, but your organization needs to allow itself to be guided. The relief agency referenced earlier experienced this as another problem in their prior research work. "There was some back-and-forth with the vendor, but not with conviction on their part," their Marketing Director recalled. "Essentially, we dictated what we wanted, and they put it into a format which resembled focus groups, but nobody from the vendor ever said, 'no, stop, that won't

work.'" Consequently, he says, the organization took the research methodology in directions they shouldn't have, without the vendor applying the brakes before the project careened off course.

As part of the partnership, also consider bringing the researcher in to meet with key end users of the information for a strategy and implementation session once the results are in. This is when managers can ask for further interpretation of the results, and discuss with the research expert and with each other how to make full use of the findings to have a positive impact on your organization. There is far greater value in this type of working session than in a formal presentation of the data. Managers can read the results

Questions to ask when selecting a research partner:

- Who will actually be working on your project? (Speak with this person, not with a sales representative.)
- What's their experience in the non-profit world? (Do they understand your industry?)
- What's their specific experience in the types of methodologies you're considering (or that they're recommending)?
- What is their research training, experience, and daily involvement
- What's included in their pricing? (You don't want to find out at the end that their quote didn't include travel, long-distance phone calls, copying, or a presentation.)
- What is their view of the role of a research consultant, and are you comfortable with their desired role?
- Are there references you can speak with regarding the firm and its work? (Make sure the references can discuss the same type of work you're seeking, so you don't get references discussing a customer service survey when you need to find a focus group moderator.)
- Can they provide success stories of similar types of work or similar clients they've served? (It's okay if they can't tell you the name of the client when relating project specifics – this is often proprietary information.)
- Do you feel comfortable with the firm and the people you'll work with? (A partnership means trusting them – if you're not comfortable with this, keep looking.)

themselves, and be prepared with a battery of questions and ideas to discuss with their peers and the researcher. Again, this is only likely to happen if there is support for the project in the organization.

When organizations have had a disappointing experience with marketing research, it's good to consider why many charitable organizations consider it invaluable. As Herbrandson says, an unfulfilling experience doesn't mean the organization should be done with research. "I think you can turn the negative perception around by talking in a very concrete way about why you feel the research is necessary, what questions you need answers for, and how the research can help answer those questions."

Whether it's a first foray into research, or a return trip, help ensure the best result possible by forming a clear objective, gathering internal support, choosing the right

researcher, partnering with the researcher to find the best way to get the information you need, and making sure expectations are managed properly. In this manner, you'll get a true view of the power of information for your organization.

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