CLIENT CHECKLIST

Wondering whether one of your agency clients or prospects is a good fit for research? Here's a short checklist that can help.

Checklist:

- ☐ Can you reach your client's audience with a survey?
- ☐ Is their audience large enough for research?
- ☐ Does limited geography affect your ability to reach enough respondents?
- ☐ Are they engaged in marketing activities that could benefit from the research?
- ☐ Do they have an email database of customers or prospects?
- ☐ Can they accommodate research fees in their budget?
- ☐ Can they accommodate the associated agency fees?
- ☐ Will they need to plan for additional respondent fees?
- ☐ Do they have sufficient budget to pursue other marketing activities once the research is done?
- ☐ Will the research timeline meet their needs?
- ☐ Are they willing to hear and accept findings that may not agree with their own assumptions?
- ☐ Are they ready and willing to incorporate the research into their marketing activities?
- ☐ How can your research provider help you plan and sell a client project?

Read on for more insight into why these questions are so important when considering a research project for a particular client.

CLIENT CHECKLIST

Familiarizing yourself with the questions discussed below can help you determine if your client is a good fit for an Audience Audit.

TARGET AUDIENCE

WHO is their audience?

Audience type is an important think to consider when planning research. B2B organizations may have a smaller target audience than a B2C company, which can make it more challenging (and costly) to get the number of responses you'll want for your research.

Even a project researching customers can be hard if your client doesn't have very many or if they're hard to get to participate.

You may be able to access the respondents your client wants even if they don't have a database of email addresses, but you should discuss this with your research provider to ensure they feel confident about reaching their audience before you pitch the research — that way you don't have to come back to an interested client and tell them it's a no-go.

How LARGE is their audience?

Some research approaches seek to provide statistically reliable insights. If so, you're probably looking for at least 300-400 participants, and maybe more.

Other approaches, such as focus groups or interviews, are aiming to get deep feedback or perspective from a smaller group and not seeking statistical reliability.

B2B organizations may have a smaller target audience than a B2C company, which may make it more challenging (and costly) to get the number of responses you'll want for your research.

For a survey, a good rule of thumb is to consider that you might gain completed responses from 5% of respondents from a quality email list of current customers — so if you want 400 respondents, you probably need a list of about 8,000 good emails.

If your client doesn't have a list, or has a small list, you should discuss other potential respondent sources with your research provider before proposing the work. You may get far better response rates with an engaged list used to hearing from you, but doing a quick 5% calculation gives you a pretty realistic low end.

WHERE is their audience?

Clients operating in a very small geography (such as in a single town or a short list of zip codes) may have difficulty sourcing enough respondents to make quantitive research worth pursuing.

If you're considering in-person focus groups or interviews, geography is critical. If your participants are across the country, you may need to run groups in multiple cities, or consider online or phone options. If you want to include participants in another country, or who speak another language, that's important to consider in the early stages as there may be additional fees for access, translation, etc.

Regardless of your client's geographical footprint, it's best to chat with your research provider before proposing anything so you know the pros and cons and the costs involved.

MARKETING ACTIVITY

Which marketing activities are they using or considering?

Regardless of the type of research you're considering, it will ultimately be of value only if it's used to develop or improve marketing. As an agency, if you recommend research that doesn't get used, you're going to face some tough questions from your client.

If your client doesn't anticipate doing any marketing or product development in the next year or two, you should consider waiting until they're closer to that point before they pursue audience research. Sometimes things can happen in the news, in your client's industry or in the world that can change how people feel about products and services.

If they ARE doing marketing, some of their efforts can be made considerably more effective and efficient with the benefit of research:

- **Website development** is much easier when it's clear which audiences are the best targets, which challenges are the most pressing for them, and which content they most value;

- **Content marketing** becomes much more efficient when the attitudes, needs, challenges and preferences of each audience are detailed in the research;
- **Email marketing** is much more strategic when particular segments are targeted with relevant content;
- **Marketing automation** is designed to achieve tremendous benefits from engaging with specific segments based on their needs and preferences, but clients often lack the segment-based insights necessary to utilize the software's full range of capabilities.

Do they have an email database?

Depending on the initiative you are pursing, your client's email database can be a convenient and cost-effective source of respondents. Their list can be used to send an invitation to an online survey, or for recruiting participants in focus groups or interviews.

If your client does not have an email database, respondents can be sourced through other means — from a professional panel provider, for example, or through online ads targeted at the appropriate group — but these will add costs which will be passed along to your client.

And depending on your goals, even if your client has a robust customer list you may want to include people outside of their customer and prospect base. Otherwise you risk getting skewed results that can't be used to project how well the company's products or services might appeal to people who don't already have contact with them.

BUDGET AND TIMING

Research fees

Can your client's budget accommodate research fees? These can range widely depending on what you're doing, how your research provider determines their fee and how you're sourcing respondents.

Some providers charge flat fees regardless of how many respondents you get. Others may charge you based on the number of participants. The number of focus groups, how many you're doing and where they are can have a large impact on provider fees.

Talk to your favorite research provider before proposing research to your client — they should be happy to provide you cost estimates based on various assumptions.

As an agency, it's important to remember that research is only one line item in the budget your client has entrusted to. Nobody — not you, and not the client — will be happy if research uses up so much that they have to wait until next year to do anything with the results.

Agency compensation

You and your agency are key participants in any research process. You will manage the interaction with the client, work with the provider during the research development process, and participate in meetings.

In addition, you may be designing email invitations, strategizing and executing social media campaigns, placing ads to reach potential respondents or traveling to attend focus groups.

Ensure that your agency's activity during the research process is appropriately scoped when considering what your client's budget may allow in terms of research.

Respondent fees

If your client doesn't have an email database, or is interested in the views of participants outside of their current customer base, additional fees will typically be necessary to secure appropriate respondents. Your research provider should be able to help you understand these costs.

Marketing budget

It doesn't make sense to spend money on research and have nothing left to actually develop and implement the marketing programs based on its findings. Don't forget to budget time for this important step!

Timing

When do you and your client need the research results?

Understanding critical deadlines (an upcoming conference or sales meeting, coordinating with an existing rebranding initiative or website redevelopment, etc.) is a key considering when thinking about research.

Some initiatives, like a straightforward survey, may be done fairly quickly. A 15-city focus group project may take a while to pull together. Different providers will have different timelines depending on their own process and the work you need done. Rush charges may apply in some situations. Talking to your research partner about project timing is critical.

DATA FRIENDLINESS

Open-minded

Your client undoubtedly has existing opinions about their customers and prospects. It would be surprising to find a client that didn't.

Part of the work of research is to determine whether these assumptions are true — or not. While research may validate some aspects of your client's perceptions, it will often find results that defy your client's expectations — and even your agency's.

Your research provider's job is to find the truth in the data they collect. They should report what they find without judgment.

But as the messenger, sometimes researchers are forced to deliver news that isn't comfortable to hear. As long as you and your client are comfortable with that, everything should be fine.

Ready to Use the Data

Are you and your client prepared to use the data to develop marketing initiatives? Nothing is more frustrating — for researchers, for agencies and for clients — than to spend time, effort and budget resources on an initiative that doesn't get utilized.

Make sure before you start that everyone is ready to find out what's most important to your client's best audiences, and use that information to build more effective programs.

MORE QUESTIONS

How can we help?

If you have other questions, feel free to submit them at FunwithResearch.com. We'd love to answer them for you!