

I'm a Researcher – get me outta here! (4)

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Are we on the cusp of a golden era?

Across a broad spectrum of industries, heads of insights departments are reporting that their services are more in demand than ever before. What's more, they are being asked not for snapshots of the Covid era but for strategic insights with which to plan for potential scenarios in the *post*-Covid era. In other words, insights – including market research and data analytics – are at the centre of strategic decision-making.

Where this is happening, the implications are – for the moment at least – profound. Insights have become indispensable to good decision-making. They are having actual, material business impact. Research in these organizations has ceased to be a line item under marketing and is being recognized as an investment. This, in turn, paves the way for bigger budgets, more resources and greater respect.

The big question, though, is can this be sustained once the crisis has passed? Will insights continue to hold centre stage? Will the function still be regarded as an indispensable investment and will it retain the respect earned in times of stress and mayhem? More to the point, what do these same insights leaders need to do to ensure that this progress is maintained and built upon?

The answer lies in a series of actions that need to be taken now – not after the storm has blown over.

Build a vision.

Every insights leader will need to build and articulate a clear, simple and powerful vision for what role they want their function to have, how they want it to behave and how they want it perceived in the wider organization. Without my wanting to be prescriptive, this vision needs to have at its core the *impact* that insights leaders want their departments to have on the business as a whole.

Decide what your core values are – and stick to them.

A vision is mere aspiration without a profound understanding, shared by the whole team, of what drives it. This comes down to the values that the team holds close and to which it adheres. For example, if a value commonly held by the team is that research is there to deliver impartial information on which others can make decisions, then it is unlikely that the function will ever be something other than a marketing line item. But if the core values include impacting the business as a whole, taking a stand and owning the outcomes, then it is more than likely that the insights function will end up being viewed as a vital investment. Work out

now what those core values are and ensure that they become embedded in all decisions relating to how the team works, is structured and behaves.

Build a plan.

Once the vision and core values are articulated and in place, it becomes easier to plan what actions need to happen to achieve the end goal. As Lee Carter, in her book *Persuasion*, points out, unless you have a specific (not general) vision of what you want to achieve, it is very difficult to know the precise actions that are necessary to get there. These will include the types of work you will take on, what you will stop doing, the stakeholders to whom you will become partners, the people you need to hire, and the training you will need to offer them. All of these need to tie back to the vision and to incorporate the values that you hold dear.

Communicate. Communicate. Communicate.

Obviously, your vision, values and plan will need to be communicated very clearly and persuasively to those to whom you report and who ultimately hold your fate in their hands. But it is equally, if not more, important to communicate all of this – repeatedly – to your team. Ultimately, they will have to be the ones who deliver, so they will need to believe to the core of their very being in the vision that is being articulated. People who cannot or will not will have to move on. In all the work that I and my colleagues have done in studying team effectiveness, three things have stood out time and time again as presaging success: inspirational leadership (articulating and living the vision), a clear strategy (the plan), and clear communication – repeated over and over.

Measure and be accountable.

Between 2015 and 2017, BCG, Cambiar, Yale and GRBN executed the most in-depth set of studies ever undertaken on the management of insights within major corporations. One thing that stood out as a key indicator of likely strategic success for an insights function was its preparedness to actually measure the business impact of everything it does. This does not necessarily mean in direct financial terms (although it helps) - surrogate measures can always be used (for example, reduction in customer churn, increase in brand awareness, improvement in customer satisfaction). The important thing is to do it! And then to learn from what worked and what did not, and to use that learning to improve. An insights function, however it is structured, needs to hold itself accountable for what it contributes to the success of the wider business. Only then will it earn, sustain and improve on its role as a strategic partner.

Market yourself!

Insights professionals stereotypically are shy and retiring types. I say stereotypically because you only to have know a few and interact with them at any conference to know that this is not actually true. But we are not good at letting those who count know just how much we contribute to the success of the business. And when I say “those who count”, I am including

those who actually do the counting – make sure the CFO knows the return on investment that he or she is getting! I assure you they will be blown away.

Similarly, during this crisis it is probable that the insights you are sharing are being distributed much more widely throughout the organization than was ever the case before. This too needs to be sustained. The marketing agency Keen as Mustard has done some ground-breaking work on this with Coca-Cola and others. Their joint paper to ESOMAR's 2019 Congress is well worth reading on how effectively to disseminate insights not only widely but in a manner in which they gain attention and lead to action.

I strongly believe that insights as a discipline and a corporate function can indeed sustain the progress it has made during the current crisis. To do so, insights leaders will need to act now with these six key principles: Vision. Values. Planning. Communication. Measurement and Accountability. Marketing.

Let the golden age dawn!