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15

2024

Why a great briefing matters – and what you need to know to have a good one

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WHY A GREAT BRIEFING MATTERS –AND WHAT YOU NEED TO KNOW TO HAVE A GOOD ONE

"Life moves pretty fast. If you don't stop and look around once in a while, you could miss it."

Ferris **Bueller**

"The 'right answer' is never as right at the outset as it is after it has evolved, informed by inquiry."

The Trusted Advisor (David H. **Maister**, Charles H. **Green**, and Robert M. **Galford**)

The Ferris Bueller quote resonates with many of us in the insights (or any other) space. Timelines are compressed, efficiencies are important, and results are needed yesterday. And, while we may not just **"stop & look around once in a while,"** we do have to remember to stop and make sure we know where we need to best add value.

For many of our clients, by the time an RFP has been reviewed & vetted internally, recipients selected, and the RFP formally approved, the schedule is already compressed. Often, the need for expedited proposals can lead to a temptation on the part of research vendors to myopically focus on action: make some assumptions, write the proposal, and deliver it on time. And, once a partner has been chosen, let's go!

But yielding to this temptation can have disastrous consequences for both clients & agencies.

When we don't take time to intentionally & thoughtfully brief the RFP, we start a potentially transformative journey with an incomplete map and limited understanding of the destination. And when we start an engagement without a briefing to ensure that everyone is on the same page and operating from the same playbook, **we risk uncovering insights that have little relevance to the actual problem and missing the ones that do,** or worse, **operating with different understandings or assumptions** of what the problem actually is.

As Maister & team note, the **"right answer"** is always better after it's evolved. A premature proposal and an expedited project start can mean **that clients' research dollars are misspent, important time is lost, and credibility is fractured.**

WE OWE IT TO OUR CLIENTS.

At Ahzul,
we believe that we have an obligation to both current and potential new clients to take this step. It's our best practice to schedule an in-depth discussion with a client to fully understand all the facets of their need before writing a proposal.

And, when we win and kick off engagements, we schedule a briefing with key stakeholders to ensure alignment, capture a thorough understanding of the business challenge, define success, and set the stage for groups to collaborate efficiently and effectively. **Again — we owe it to our clients to approach their challenges thoroughly, thoughtfully, and with curiosity that best prepares us all to succeed.** Often, we find that this is mutually beneficial, as a good briefing helps us considerably **and** can help our clients think through new aspects of their request that haven't been considered.

We do this out of a desire to be trusted advisors to our clients, focused on their success & on making the most positive impact possible on their businesses. ↗

THE FOUR PRINCIPLES THAT DRIVE OUR BRIEFINGS

— and what they mean for clients

Over its 15+ year history, Ahzul has implemented & refined a set of principles for an **effective & productive** briefing both at RFP and project kickoff stages.

DO YOUR HOMEWORK.

We approach each briefing call with an open mind — **and an awareness of the client, their business, and any prior work we have done for them.** This can mean researching stakeholders on LinkedIn, scouring the company website & investor relations reports, and searching for news and updates on the company strategy.

Perhaps most importantly for current clients, it means **reviewing prior work** and **formulating an initial understanding** of how the current project aligns with earlier initiatives and learnings. This is a critical step in making sure that the briefing is productive and on-strategy at each stop of the project.

For clients, a few questions for consideration can be helpful at this stage:

1. What does the research agency need to know about how you came to this point? What historical factors are important for them to know in order to succeed?

2. What objectives (corporate, departmental, etc.) factor into your success here? Why is this engagement even something you're considering, given overall objectives?

3. What have you learned from previous engagements or internal discussions that the research agency may need to know?

RESIST THE TEMPTATION TO JUMP IMMEDIATELY TO LOGISTICS.

The ins and outs of a particular methodology are easy things to focus on — especially given the frequent need to move quickly. But we find that **taking a consultative approach and spending a majority of the time (often up to 80% of the time allotted) on strategic questions is critical:**

- What's the context for this RFP? What's making this important at this particular time?
- What decisions will this research support? What business questions are behind the research request?
- What does success look like? How will success be measured?
- What barriers are there to success? How can we consider ways to address potential roadblocks?
- What milestones should we be aware of — even milestones or decision points in other parts of the organization?

In our experience, once the briefing call moves to the logistics of approach, numbers of ethnographies or total sample sizes, and specific markets to focus, it's very difficult to go back to the strategic questions. And, given a good understanding of the strategic context, **it's easier to iterate later on the details of the meth-odology and keep that context in mind as the engagement progresses.**

For clients, this means considering which, if any, of the following areas are important for the research agency to keep in mind:

1. The competitive landscape
2. Internal organizational dynamics & objectives
3. The cultural milieu that affects your category
4. Corporate strategic decisions that affect (or provide context) for this engagement

It also means considering before-hand:

1. What are the "watch-out's" that the research agency may not be aware of? Any third rails?
2. What has contributed to the success of similar engagements in the past? What learnings can you share to help the research agency succeed?
3. What are the stage gates & internal milestones that need to be considered in the overall timeline? How can you and the research agency best prepare for them as they approach?

BE WILLING TO ASK "DUMB" QUESTIONS.

We all like to be perceived as informed & competent. But this sense of pride can sometimes be counterproductive if we're unwilling to ask questions that everyone seems to know the answer to. While, as mentioned earlier, it is very important to prepare and read up in advance of a briefing, **we never know as much about their business as our clients do, and an honest acknowledgement of what we don't know both helps us better understand our clients' businesses** and, more importantly, demonstrates an authentic desire to understand them and help them find a solution.

For clients, this means:

- Encouraging agencies to ask questions and avoiding the assumption that they understand your business **(and jargon and acronyms)** as well as you do.
- Resisting the temptation to see questions as a sign of weakness or a lack of experience — and **enabling perspectives that value questions as a sign of investment in a solution.**

ARTICLE THE CHALLENGE IN A WAY THAT CONNECTS THE RESEARCH TO THE STRATEGY.

Having fully understood the overall context for the RFP, we believe it's important to articulate the "Central Question" in a way that is **not focused on research objectives, but rather on the overall strategic question** the research is designed to address. For example, rather than limit our focus to "Understanding consumers' attitudes towards…", we intentionally step back and distill the challenge & objectives in the context of the business ("Increase messaging resonance to increase consideration of client's product…").

This serves as a reminder for our team of the core question that is driving our work — **and helps our clients keep the strategic frame in mind throughout the research,** whether we're chosen as their partner or not.

For clients, this can be a valuable "framing" tool for your organization as well. Ensuring organizational buy-in — and keeping an engagement focused on what's most important — helps to keep objectives from continually shifting and focus from becoming distracted by new conversations or ideas.

The "Central Question" isn't just for the research agency to stay on track; it can be a powerful tool to keep internal teams focused, too.

For clients, this means:

- Considering the business objectives and strategic outcomes that are needed for the project to be a success. What decisions will be made based on the outcome of the research?
- **Understanding stakeholders' perspectives** on the challenge to avoid a myopic focus on research objectives.

We firmly believe that success of any engagement depends heavily on taking this initial step to understand where our clients are coming from. And, beyond individual project success, we believe that this empowers us to be better long-term partners for our clients.

If you would like to learn more, contact us!

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