From Story to Glory
Structuring a Narrative Given Your Audience

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On behalf of MRII and the
University of Georgia Center for Continuing
Education & Hotel

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MARKET RESEARCH CORE BODY OF KNOWLEDGE

- Introduction to Market Research and the Research Process
- Market Research Design and Data Identification
- Sampling in Market Research
- Quantitative Data Collection Methods
- Qualitative Market Research
- Measurement and Questionnaire Design
- Introduction to Data Analysis
- Advanced Analytic Techniques
- Working with Secondary Data: Syndicated and Big Data
- Communicating Research Results
- Global Market Research
- Ethics and Legal Issues
- Emerging Methods and the Future of Market Research

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Introduction to Market Research and the Research Process
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Case Study – The Best of Surveys, the Worst of Surveys

Predict Churn
- Annual subscription business
- Wanted to predict which customers would leave in order to prioritize intervention

Methodology
- Surveyed customers in month prior to end of subscription
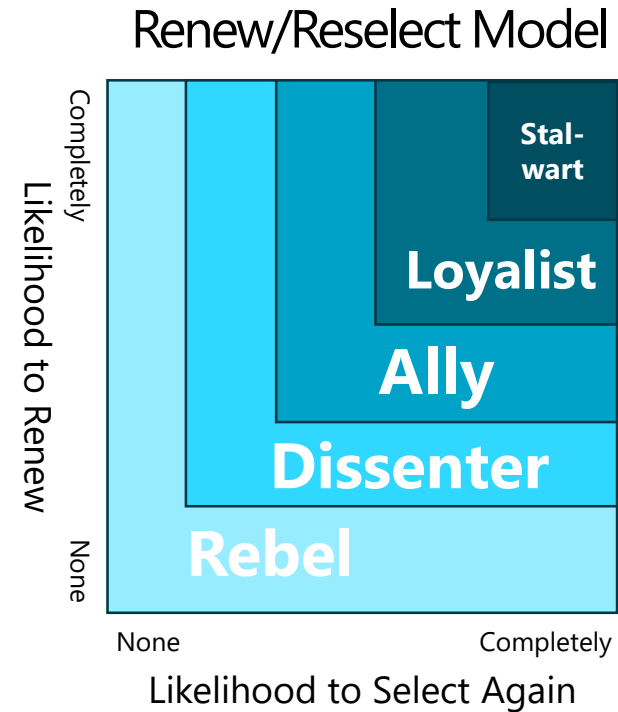- Month later, integrated renewal status by survey response

Analysis
- Questions that correlated to renewal
- Indices that correlated to renewal
- Segmentations that correlated

Indices and Segmentations with Greatest Correlation to Renewal

Rank	Question / Index / Segmentation	Correlation	Shared Variance
1	Renew/Reselect Model	0.378	14.3%
2	Weighted Renew/Reselect Index	0.374	14.0%
3	Weighted Renew/Reselect/Recommend Index	0.368	13.5%
4	Renew/Reselect Index	0.364	13.3%
5	Renew/Reselect/Recommend Index	0.348	12.1%
6	Vovici Champion Model	0.344	11.8%
7	Renew/Recommend/Switch-reluctance Index	0.341	11.7%
8	TNS Loyalty Model	0.321	10.3%
9	Apostle Model	0.244	5.9%
10	CSAT/Expectations Index	0.214	4.5%
11	Net Promoter Segmentation	0.207	4.3%

Renew/Reselect Model

Likelihood to Renew (Completely / None) vs Likelihood to Select Again (None / Completely)

Segments: Stalwart, Loyalist, Ally, Dissenter, Rebel

1. If you were selecting a provider for the first time, how likely would you be to choose Acme again? *Not at all…, Slightly…, Moderately…, Very…, Completely likely*
2. How likely are you to renew your membership with Acme?

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Of course they adopted NPS! ☹
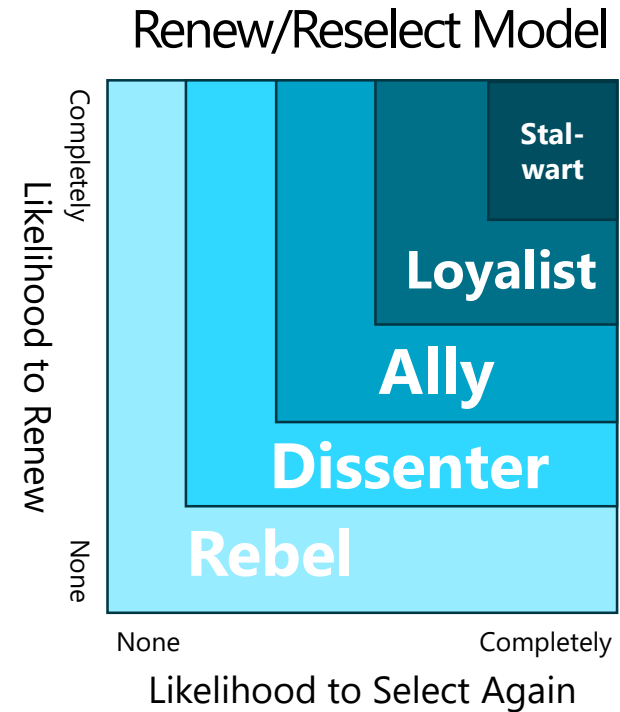
Renew/Reselect Model

Likelihood to Renew (vertical axis: None → Completely)
Likelihood to Select Again (horizontal axis: None → Completely)

Segments: Stalwart, Loyalist, Ally, Dissenter, Rebel

1. If you were selecting a provider for the first time, how likely would you be to choose Acme again? *Not at all..., Slightly..., Moderately..., Very..., Completely likely*
2. How likely are you to renew your membership with Acme?

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What Did I Do Wrong?

I used the wrong narrative structure to tell my story.

I reported my research results without any wider context.

I failed to understand my audience.

Agenda

The mandate is for researchers to be excellent communicators able to rise above the noise. Learn the best story structures for reporting on research, how to determine the story structure that fits your data and your audience, and then how to craft a story that inspires change and action.

Becoming a better storyteller requires pulling in more information than ever before (including more than your current research project), while understanding your audience better than ever before (including what they know and don't know). Good stories are shaped in part by choosing which research to leave out. And stories drive change when the audience is able to connect to the data emotionally and by interacting with one another as they explore the data.

This workshop will provide practical advice for communicating research results, which you can immediately apply to your next project.

- 1. A review of common story structures used for sharing research results
2. How to determine which story structures are appropriate given your data and your audience
3. How to craft a story that will inspire change and action based on the data

A story has three elements:

But No One Agrees What They Are!

1. A beginning
2. A middle.
3. An end.
– Aristotle, 335 BCE

1. Setup.
2. Confrontation.
3. Resolution.

1. Protasis.
2. Epitasis.
3. Catastrophe.
– Aelius Donatus, 450 CE

1. Characters.
2. Conflict.
3. Resolution.

1. Persons.
2. Situation.
3. Something has changed.
– Malcom Cowley, 1982

Omne trium perfectum.

My Three Elements of a Good Story

1. Elicit empathy.
2. Create suspense.
3. Provide emotionally engaging ending.

Suspense drives our appetite for stories. Our hunger is satisfied by the emotionally resonant answers at the end.

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Forget the Monomyth...
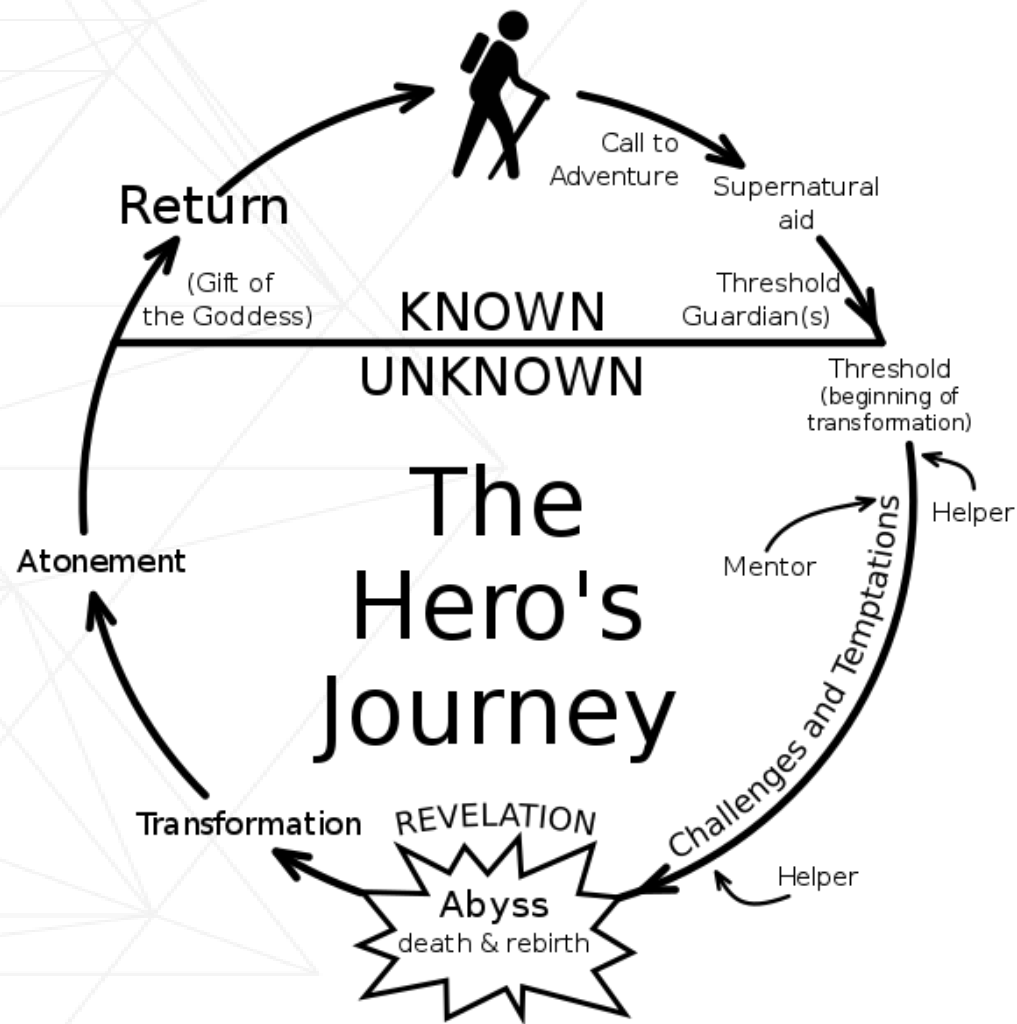
Narrative Structures to Consider

- Questionnaire Structure
- Inverted Pyramid
- Inverted Pyramid with Hook and Kicker
- Research Process Outline
- Mystery Narrative
- Spiral Curriculum
- Others

News stories and structures are more useful to the researcher than fiction structures.

Questionnaire Structure

- Screener
- Open-Ended Questions
- General Questions
- Specific Questions
- Demographics
- Follow-up

Questionnaire Structure – Pros and Cons

Pros

Generated by almost all survey systems.

Readily available when need to present interim results or on short notice.

Cons

Questionnaire structure is a compromise between information objectives and the respondent experience; it is not intended for the audience.

Questions and choices are the wrong units for narrative:

- Sometimes question indices are better (e.g., CSAT index).
- Sometimes choices should be grouped together (e.g., grouping cities into control vs. test markets, collapsing education choices into fewer categories).

Inverted Pyramid

Most Important
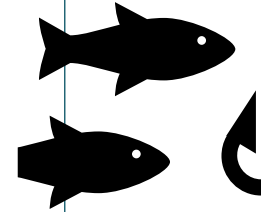("BLUF" – Bottom Line Up Front)

Less Important

Least Important

Who, What, When, Where, Why; Recommendations & Conclusions

Supporting Information

Additional Facts

Background

Alternative Explanations

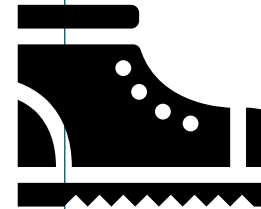Nice-to-have Information
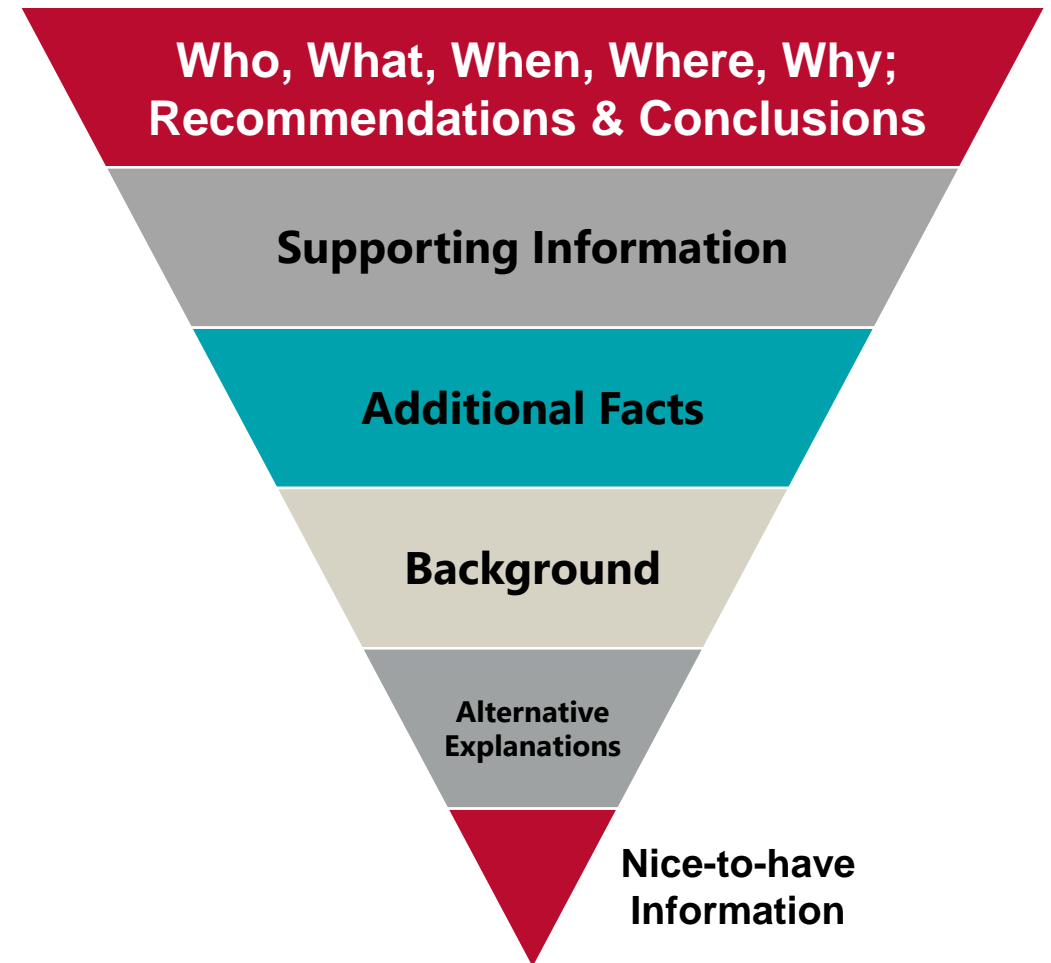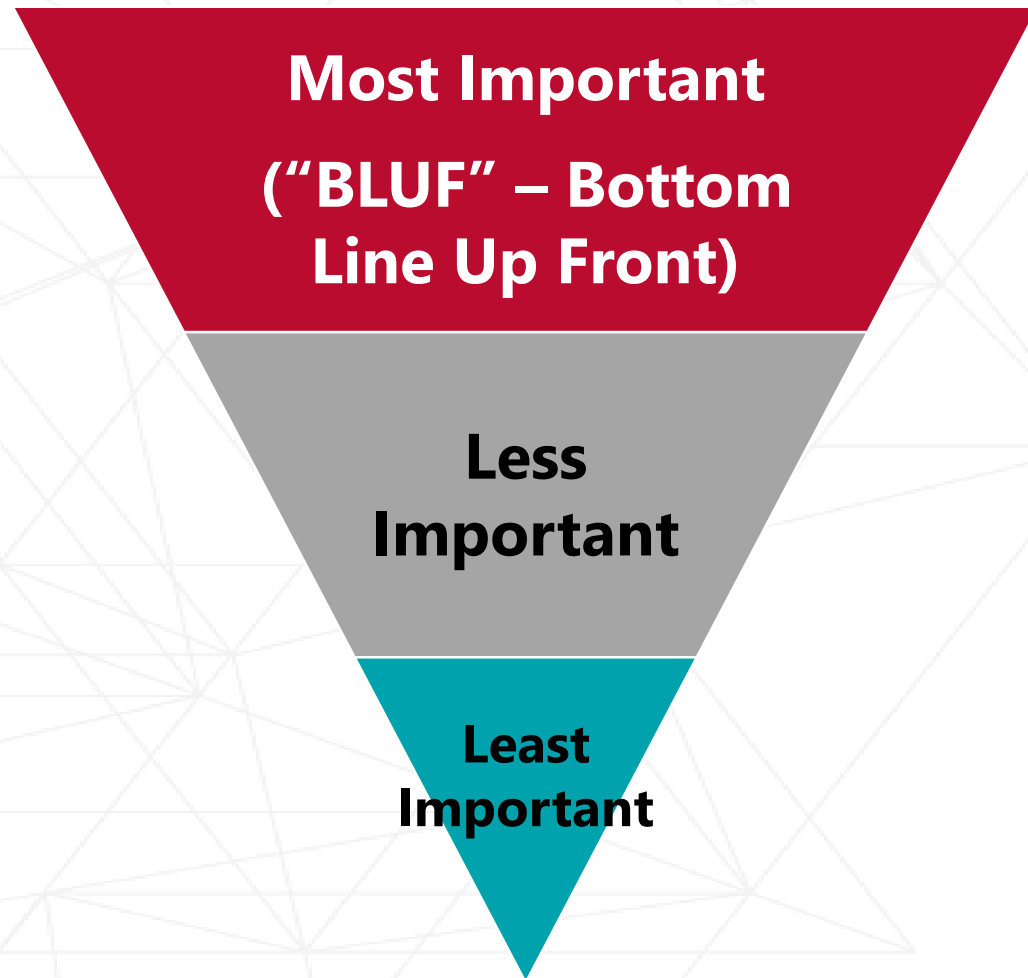
Inverted Pyramid – Pros and Cons

Pros

Accommodates mixed audiences: senior executives can leave early, while understanding the big picture, while line managers and staff stay and get additional detail.

Can be easily compressed to fit the time available, by "cutting from the bottom."

Cons

Often lacks suspense and emotional resonance.

Surprising findings when presented in this way are less likely to be believed and are more likely to be pushed back on.

Inverted Pyramid Feature

Anecdotal Lead

Who, What, When, Where, Why, How; Recommendations & Conclusions

Supporting Information

Additional Facts

Background

Alternative Explanations

Kicker
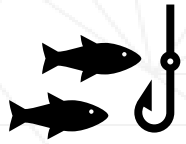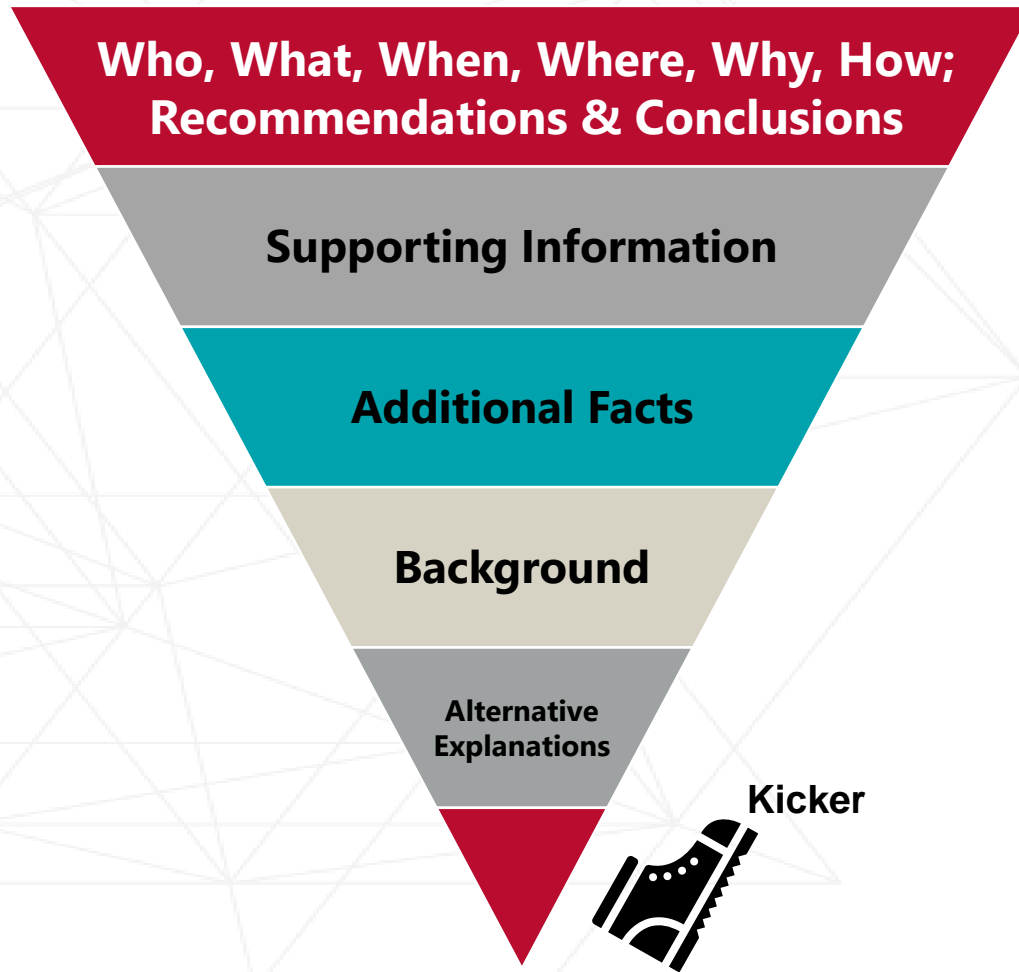
- Anecdotal leads
  - Story to begin the story
  - Concrete details that reveal an abstract idea
  - 62% of stories winning the Pulitzer Prize use anecdotes; only 25% use the inverted pyramid*
  - Use emotional language to elicit empathy
  - Video IDIs that emphasize the study's overarching themes are excellent for this

* "The strategic ritual of emotionality", Karin Wahl-Jorgensen, 2012

Inverted Pyramid with Hook and Kicker – Pros and Cons

Pros

""

A good hook will build empathy in the audience.

The kicker can emphasize the final emotional engagement.

Cons

""

Need to jump to the kicker for those leaving early, then resume in the middle; suboptimal for those who stay for the whole presentation.

Research Process Outline

Methodology

Demographics

Findings 1

Findings 2

Findings 3

Surprising Conclusion

Research Process Outline – Pros and Cons

Pros

Makes the case item-by-item to foreshadow the surprising conclusion and give it a sense of inevitability.

Cons

Can't be easily shortened to fit the time available.

Need to engage the audience at the beginning and hold their attention.

Can seem dry and academic.

Mystery Narrative
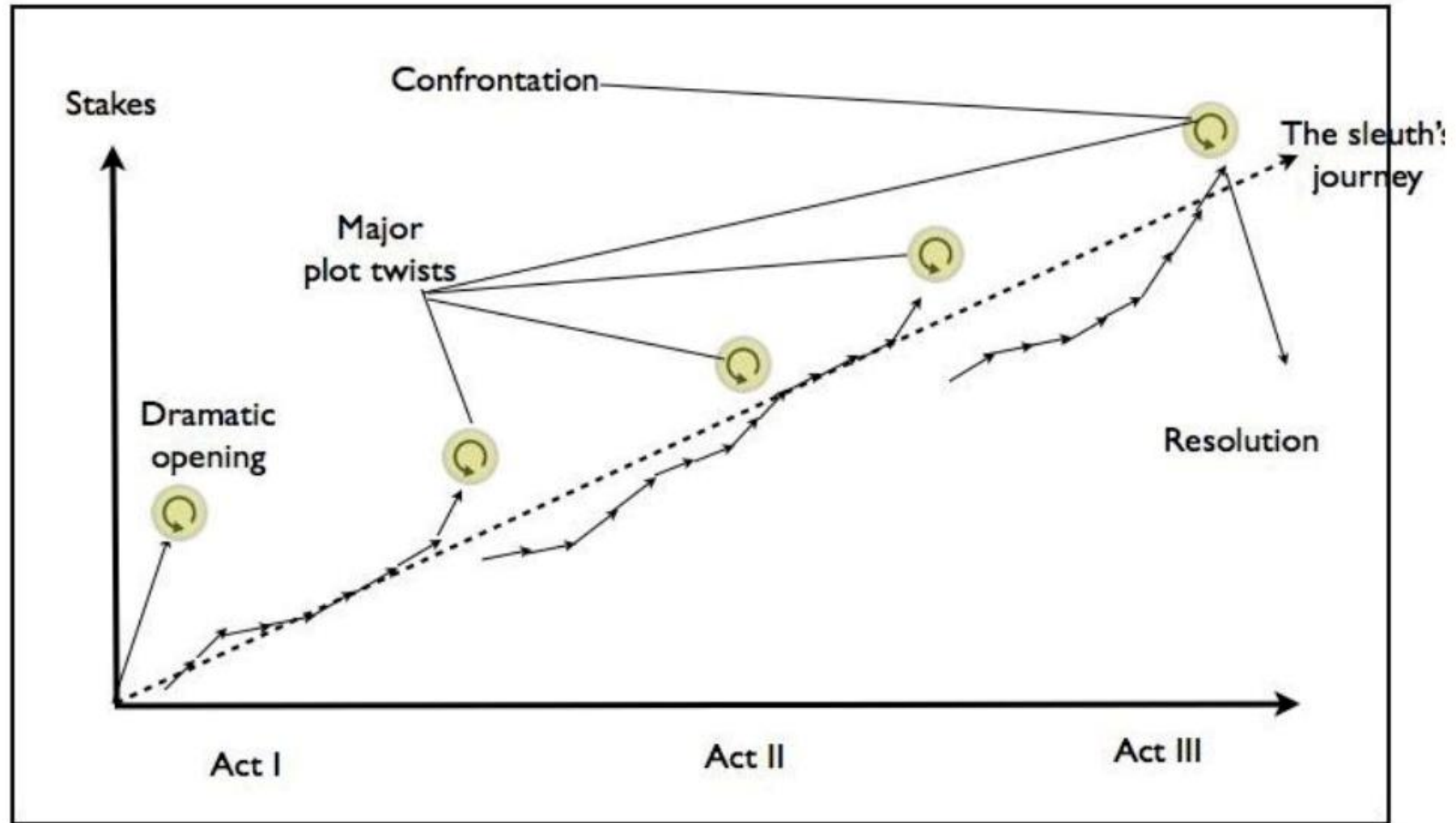
Mystery Narrative

Act One

- Present the "crime"
- Offer plausible suspects

- Introduce complications

- Market share is dropping in Midwest
- Acme has new product; Vertex has promotions; Zenith has repriced
- Decline started before competitor activity

Act Two

- Initial investigations and interrogations reveal clues
- Disappearance of one suspect
- Raise the stakes

- Collect secondary sales data and conduct IDIs
- Vertex discounting ended but sales didn't rebound
- Trend report may indicate drop in the Northeast

Act Three

- Unsatisfying solution reached
- Return to overlooked clue from act one
- Confrontation

- Zenith's repricing is nationwide so why MW/NE?
- Vertex promotions through MW/NE-focused chain
- Counter-promotions targeted to MW/NE

Research Outline – Pros and Cons

Pros

Can provide emotionally engaging way to re-create steps and build case for surprising conclusion

Show thoroughness of investigation
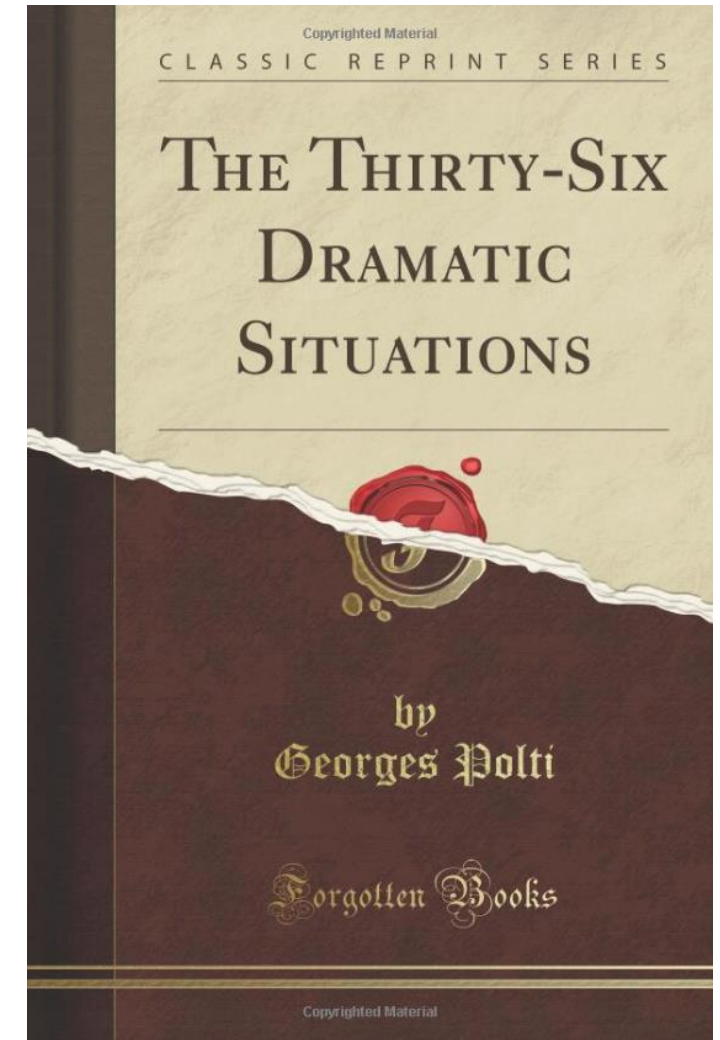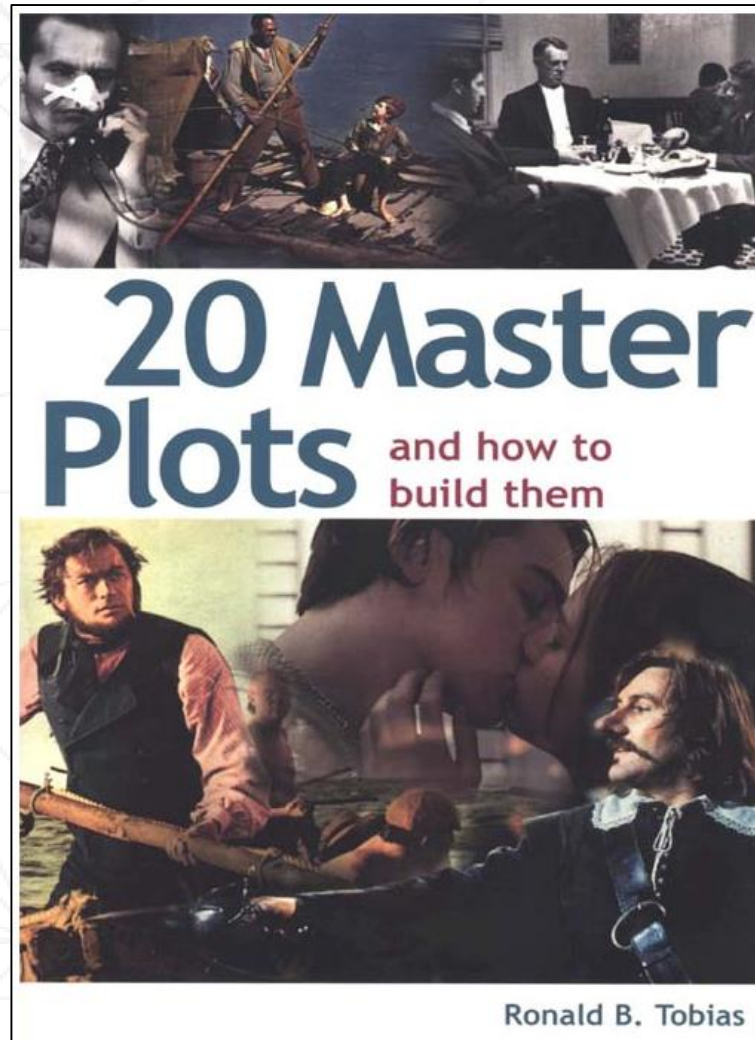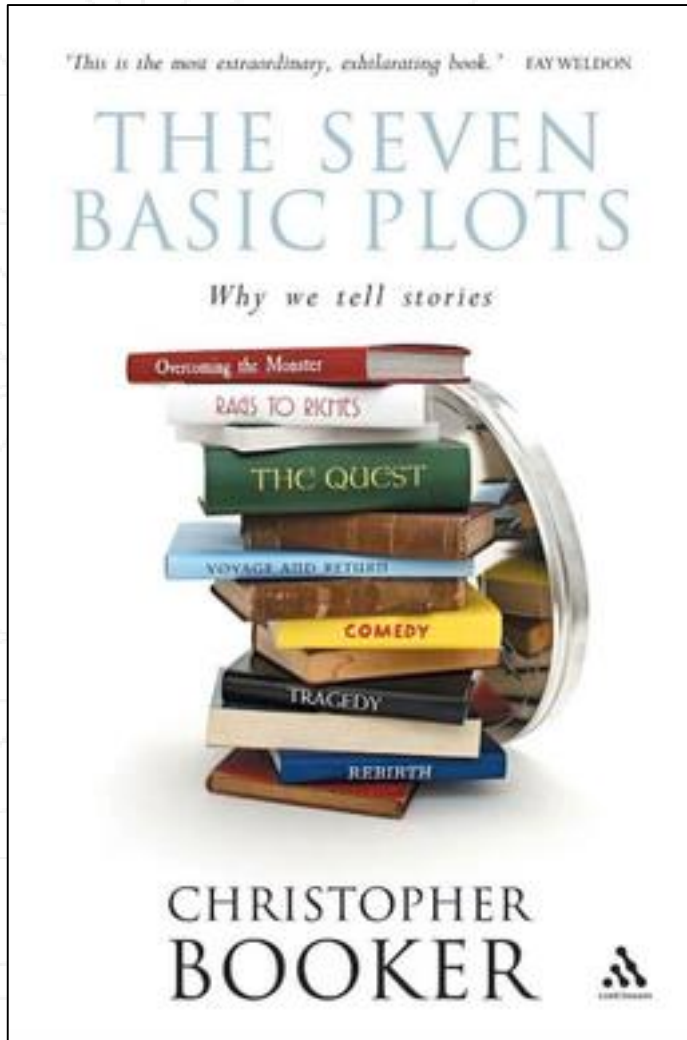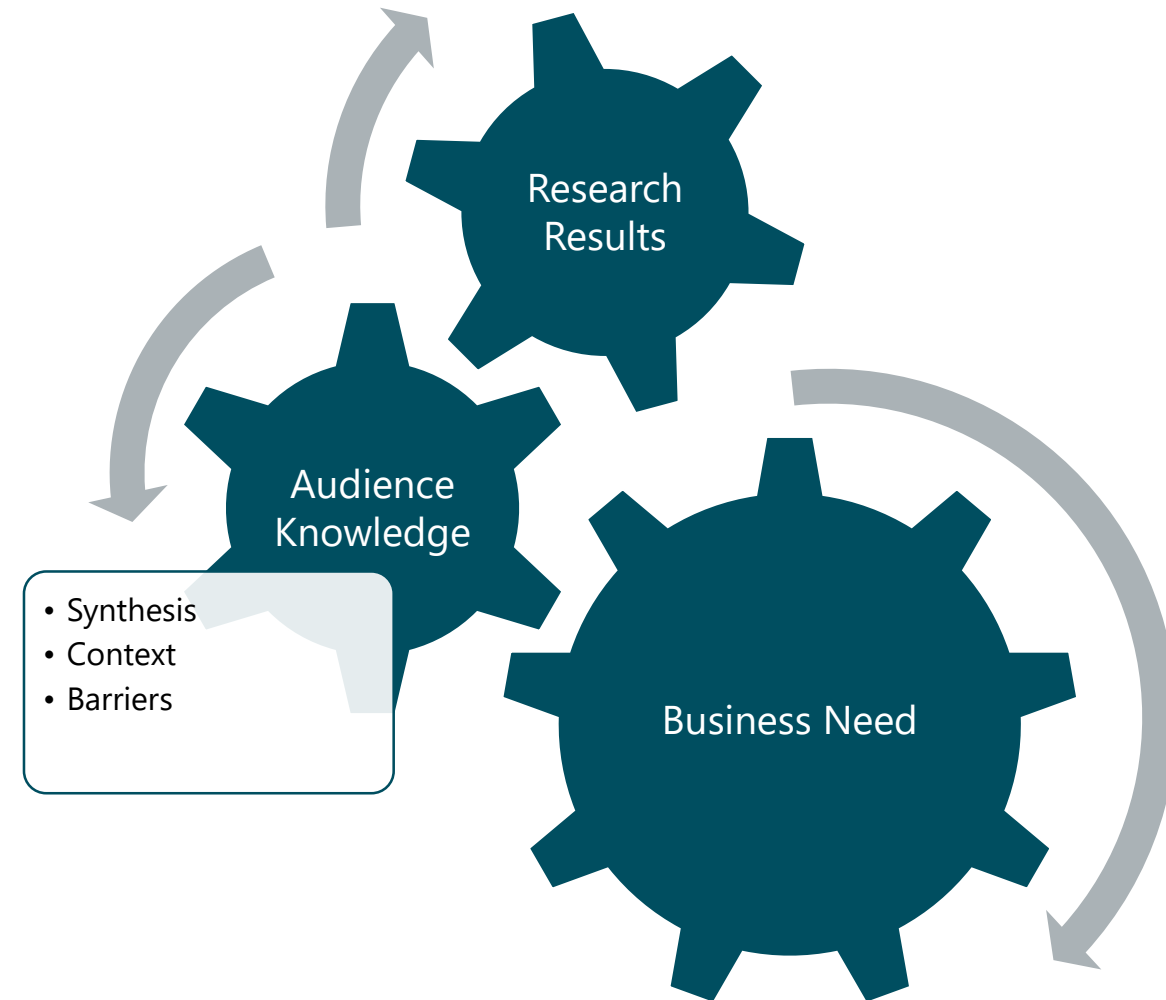
Some of the most memorable presentations I've seen

Cons

Can seem too clever

Doesn't fit too many research studies

Many Other Approaches to Adapt

Mental Model of Research Presentation Needs to Expand

Research Results

Research Results

Audience Knowledge

- Synthesis
- Context
- Barriers

Business Need

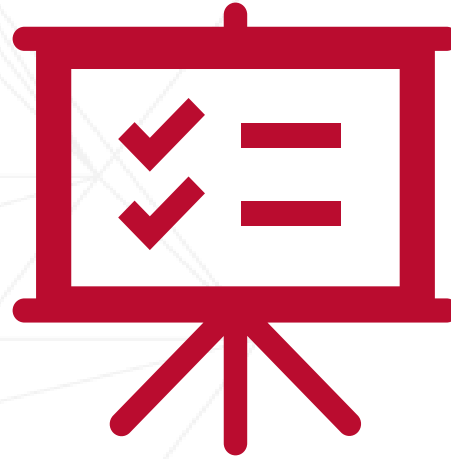# What We Want to Accomplish with Our Stories:

Take a group of people, diverse in terms of level in the organization, and functional responsibilities …

Manage information (research results) in a way that gets this diverse group of people to make choices and decisions that …

Lead ultimately to positive results for the business (or other organization)

No Single Ideal Work Session Format, But …

- It's a formal plan, not just a series of email responses
- It has some depth to it; not quick or rushed
- It takes place after the presentation – giving team members a chance to reflect on the content
- It provides opportunity for team members to ask in depth questions, and provide their feedback
- It can be structured as a plans exercise, for different constituencies
- It can be iterative

From Story to Curriculum

- Spiral curriculum
  - Each subject is revisited at intervals, at a more sophisticated level each time
    - First there is basic knowledge
    - Then more sophistication is added, reinforcing principles that were first discussed
    - And so on.

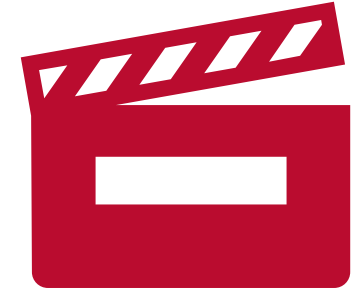# A Paradigm for Increasing the Impact of Research Results

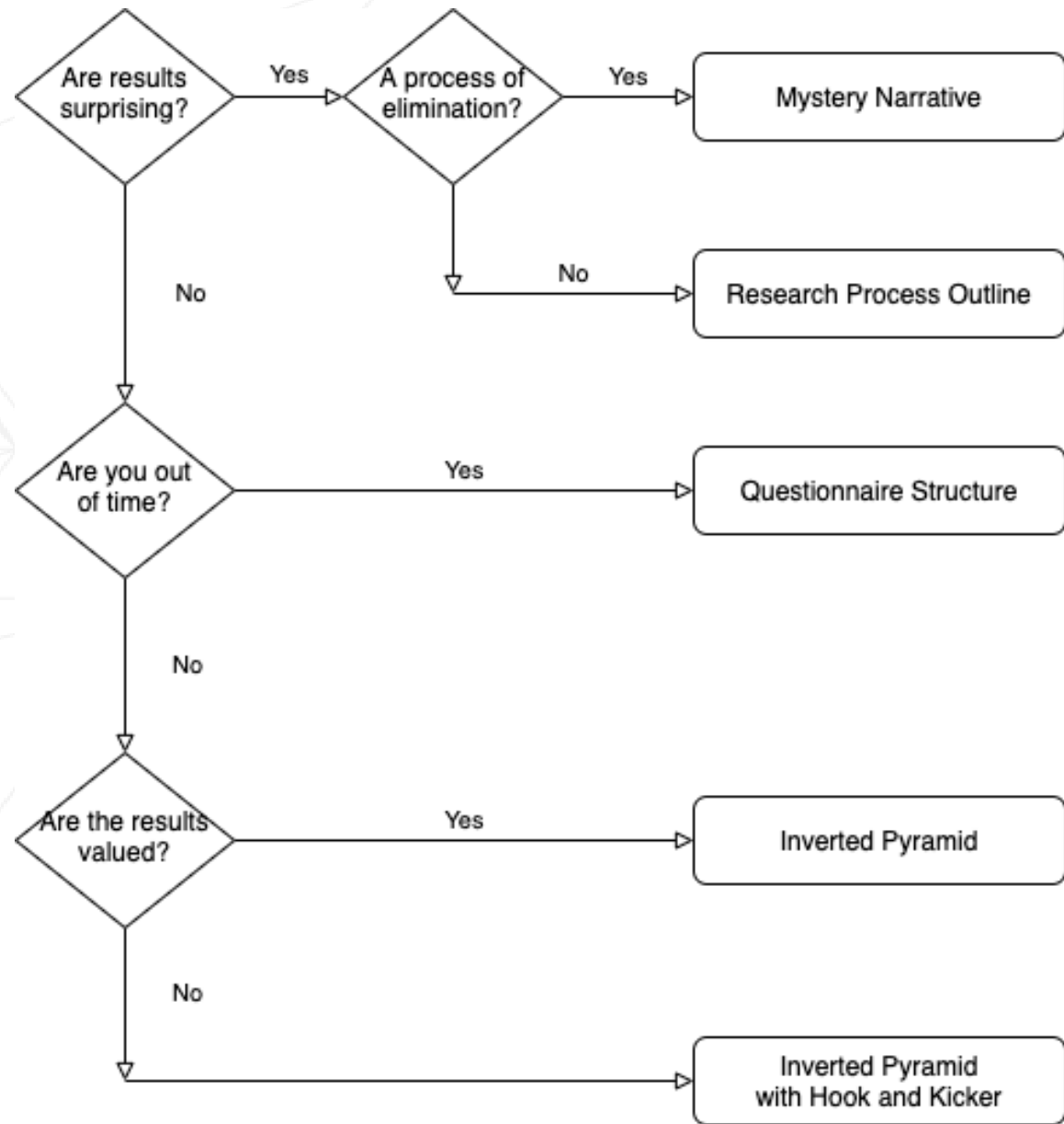|		
Assimilation	Acceptance	Action
If they fully understand what it is, what it means, and how they can use it ...	If they believe, trust and embrace it ...	The likelihood that the research results will have **impact** goes up.

Choosing a Structure

Flowchart:

Are results surprising?
- Yes → **A process of elimination?**
  - Yes → Mystery Narrative
  - No → Research Process Outline
- No → **Are you out of time?**
  - Yes → Questionnaire Structure
  - No → **Are the results valued?**
    - Yes → Inverted Pyramid
    - No → Inverted Pyramid with Hook and Kicker

What Did I Do Wrong with My CX Study?

▼	I used the wrong narrative structure to tell my story.	I used the Inverted Pyramid instead of the traditional Research Outline.
🔬	I reported my research results without any wider context.	I needed to provide context about the extensive academic case against the Net Promoter Score.
🧍	I failed to understand my audience.	The project lead changed mid-project and hadn't bought into the goals and methodology.

Case Study – Subsequent CX Study

Nurture Installed Base

Annual subscription business

Wanted to ensure renewals and promote upselling across product line

Methodology

Annual census fielded in quarterly cohorts

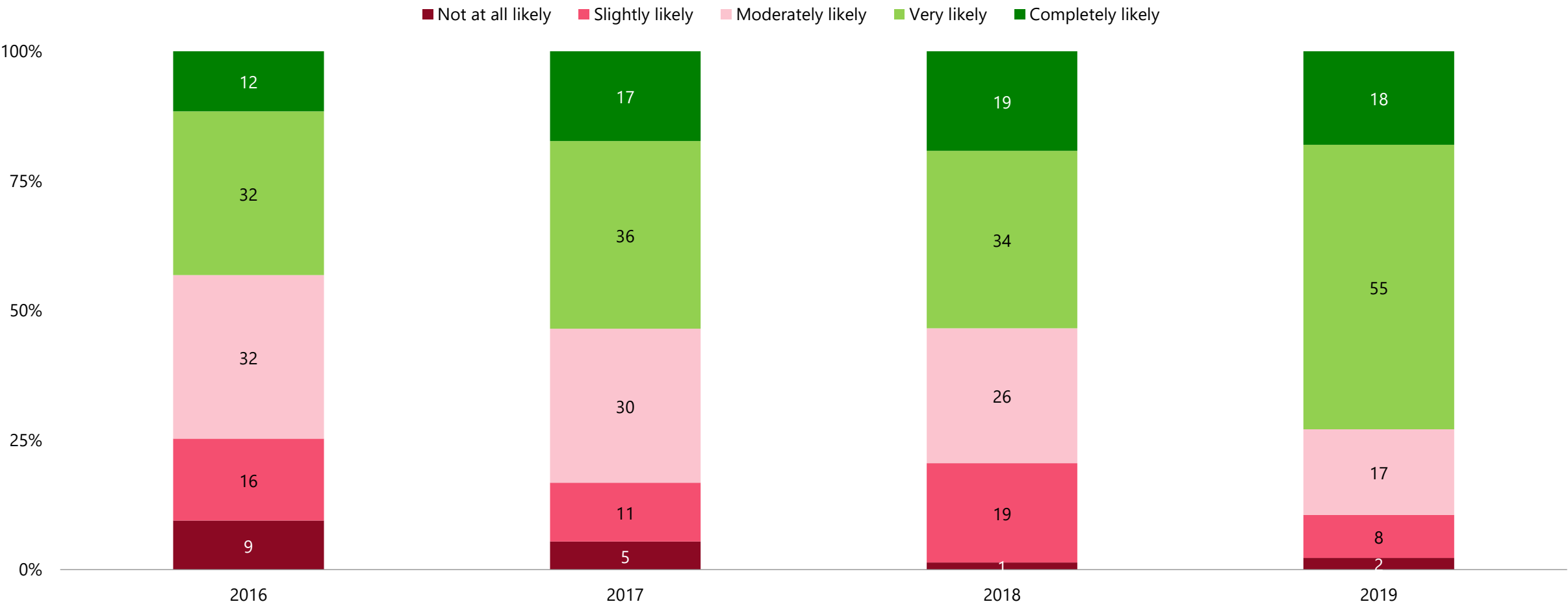Spent considerable time with CEO and CXO to really understand the audience

Analysis

Conducted Key Driver Analysis

Used the Inverted Pyramid narrative again **but** provided background on the case against NPS

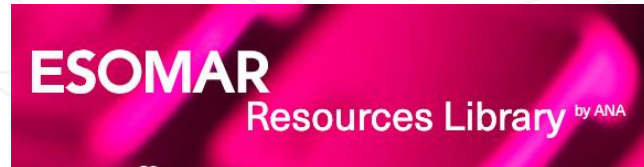Spiral follow-up to develop custom loyalty segmentation

"Increase the Impact of Research Results" by Jeff Hunter:
http://bit.ly/MRXimpact

"10 Tips for Communicating Survey Research Results":
https://ana.esomar.org/results.php?q=henning

MRX blog with Quirks Event recaps:
http://blog.mrii.org

8-14-hour course, written by Fred John:
http://marketresearchcourses.org
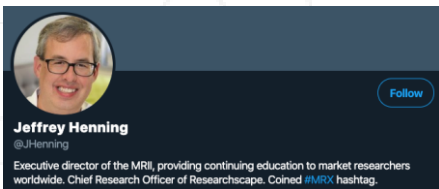
Follow me on Twitter or email me:
https://twitter.com/JHenning – jhenning@mrii.org