



Avoiding Research Limbo:  
How to Keep your Research from  
Sitting on the Shelf

# We've all been there...



Pouring our blood, sweat, and tears into a research effort that ends up going nowhere.

How do we make our efforts have impact, and how do we make sure research dollars are actually being used to **drive the business forward?**



# It's not just the catch that matters...



*Before the Research:  
Foundation and Buy-in*



*Research Execution*



*After the Research:  
Activation*



# Before the Research: Foundation and Buy-in



Add a **Phase 0** to your research...



Audit



Crowdsource



Ideate

*Especially when you've got a lot of cooks in the kitchen!*



# Know what's been done and identify gaps



## Audit: Case Study 1



### Goal

Revamp CX program for group benefits company



### Process

#### Phase 0

- Evaluate >10 existing surveys to consolidate and find efficiencies & gaps
- Conduct a series of 30-minute, internal IDIs, dyads, & triads



### Outcome

- Uncover the core issues/content
- Streamline overlapping surveys
- Cover all gaps in data collection

# Know what's been done and identify gaps



## Audit: Case Study 2



### Goal

Conduct a largescale thought leadership study with fresh content



### Process

Phase 0

- Literature review of existing research
- Present what is known and where there are gaps
- Create a questionnaire that addresses unique content



### Outcome

The lit review:

- Prevented us from retreading old ground
- Ensured fresh content, leading to significant media pickup

# Ensure buy-in from multiple stakeholders/constituencies



## Crowdsource: Case Study



### Goal

Conduct a biannual multi-sponsor (~10) industry study and give all stakeholders the opportunity to be heard on key needs and priority content



### Process

Phase 0

- Online bulletin board discussion with feedback on previous questionnaire and suggestions for adds, edits, deletes



### Outcome

- Leverage the results to streamline the questionnaire development process
- Increase stakeholder buy-in

# Ensure buy-in from multiple stakeholders/constituencies



Ideate:  
Case study



## Goal

Explore stakeholder hypotheses and assumptions around buyer personas and behaviors



## Process

Phase 0

- Used Mural to brainstorm assumptions around buyer attitudes, behaviors, etc.
- Used feedback to build guide and set up assumptions to be tested



## Outcome


- The result was a buyer map that could be leveraged, tested, and validated/adjusted in the research




# After the Research: Activation



Do something with the research...

 Disseminate

 Illuminate

 Ideate

*Bring the research to life.*



# Ensure buy-in from multiple stakeholders/constituencies



## Disseminate: Case Study



### Goal

Allow a broader base of stakeholders to hear directly from their audiences



### Process

- Invited a vetted panel of SBOs to attend a live panel
- Discussions were held in front of a wide audience
- Ideation sessions were then held to identify and address key challenges



### Outcome

- Seeing research live makes it memorable and actionable on a wider scale
- Leading from the live discussion to ideation yielded impactful results



## Illuminate: Case Study



### Goal

After a segmentation, bring the segments to life for research stakeholders, especially those who have limited experience with research



### Process

- Hosted a “segment cocktail hour”
- Recruited consumers who are archetypes of each target segments
- Senior stakeholders were able to mingle, meet, and ask questions



### Outcome

- The experience was highly memorable for leadership
- It continues to be referenced in future concept development year over year

# Put the research to use in creating new concepts/offerings



## Ideate: Case study



### Goal

Leverage research findings to develop products, messaging, and digital experiences for the target consumer



### Process

- Workshop with ~30 people from multiple departments using the Design Thinking processes
- A subsequent webcast to share results with full organization



### Outcome

- Embed personas into the company thought process
- Build on ideas uncovered and generate new product design, messaging, etc.

# Want to discuss further?

Feel free to follow up with me to discuss and/or for some general ideation tools:

- Post research homework/worksheet
- Ideation exercises
- Design thinking framework



Amy Rey  
Managing Director, Zeldis Research  
[amy@zeldisresearch.com](mailto:amy@zeldisresearch.com)