

So you've gone to the client side...

Research Partner



Kantar: 9/2008-3/2020
The Sound: 3/2020-12/2021

End Client



Tovala: 12/2021-







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Partner Commandments

End Client Complement

**1. Get to know your client's
business**



Be transparent

**1. Act as an extension of their
team**



Ask for help

1. Make it relevant



Accept trade-offs

1ST COMMANDMENT:

Get to know your client's business

- Business model - How do they make money?
- Goals & priorities - What are they trying to do? What's the NEXT biggest problem to solve, and why?
- Your client personally - What motivates them? What are they trying to do? How are they feeling?
- Team dynamics & culture - Who are the stakeholders, and what do they value?
- Decision criteria - Budget, timing, methodology, rigor, etc
- **Your job?** Do your homework, and ask thoughtful questions; when in doubt, ask why

1ST COMPLEMENT:

Be transparent

- Share the big picture - context, background (why / what's led you here)
- Share the details - more often than not, you have specifics in mind (methodology, design, sample size, analytics, specs, etc)
- Be honest - about budget, timeline, constraints, challenges, roadblocks, changes
- **My job?** Assume more info is better; remember garbage in, garbage out



2ND COMMANDMENT:

Act as an extension of their team

- Be a team player, take one for the team
- Go above and beyond, be proactive
- Make their lives easier, help them look good
- Your job? Ask what would help, and how you can help

2ND COMPLEMENT:

Ask for help

- Recognize you can't do it all, or know it all
- Time vs. money
- Builds trust and keeps the door open
- My job? When in doubt, ask the question





3RD COMMANDMENT:

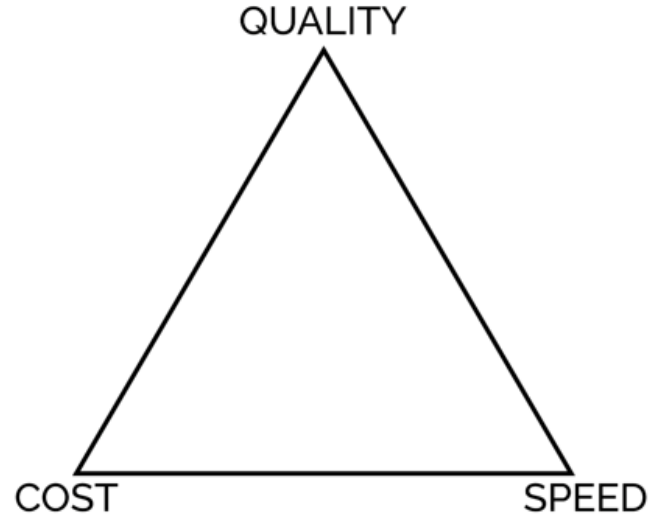
**Make it relevant aka
Tailor your approach aka
Be flexible**

- “Templated” is a four letter word
- Highlight what they care about
- Flex when you can
- Walk away early when necessary
- **Your job?** Make it obvious why it fits or will work; don't overpromise and underdeliver

3RD COMPLEMENT:

Accept trade-offs aka Be reasonable

- Know your priorities
- Play defense internally
- Be accommodating - when you have X, give it
- **My job?** Make tough decisions, know when “good enough” is good enough





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Now, it's your turn!

Clients:

Think of your favorite partners - why? Did they follow one of these commandments particularly well?

Partners:

Think about your clients - anything missing from complements you've found most helpful?