



Using Analytical Planning to Drive Organizational Action

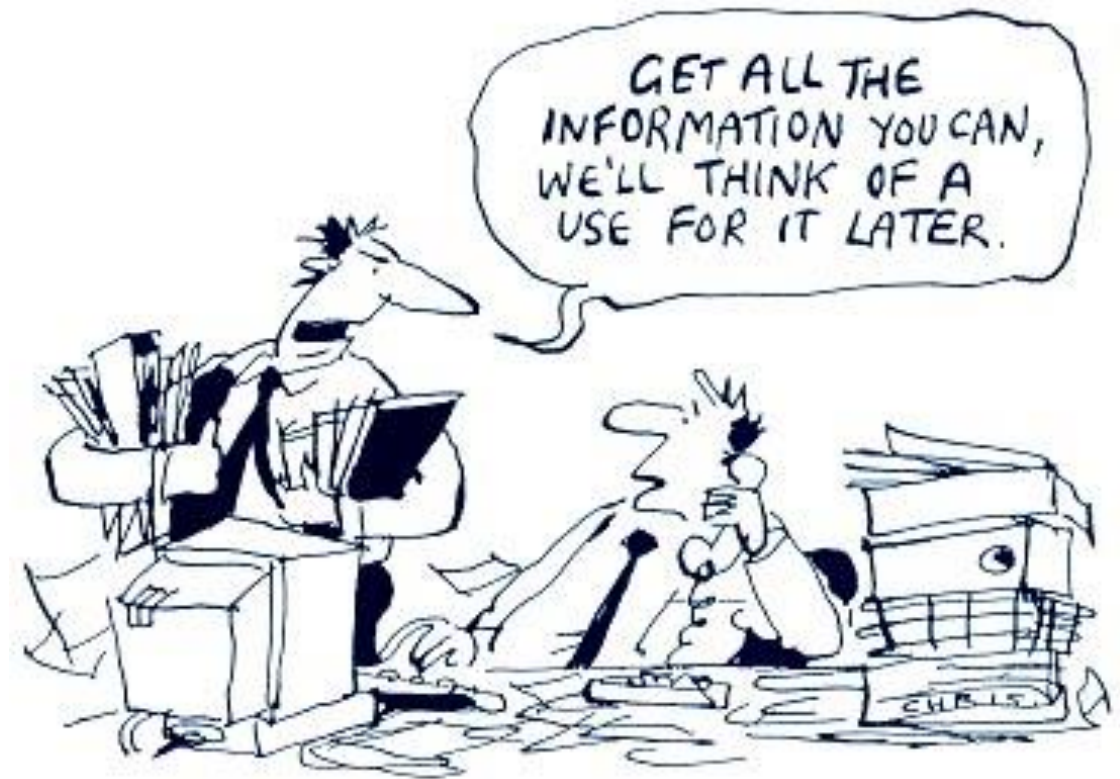
DRIVING INSIGHT RATHER THAN DRIVING DATA

- CINDY TRAN

Objective of today's session

- ▶ Understand the importance of creating Project and Analytic Plans prior to seeing the data
- ▶ Learn how to create story-telling Analytic Plans
- ▶ I will highlight the skills you need to **elevate the importance** of your research function; whether you're on the vendor or client side.
- ▶ We need to **shift** our focus **from data to insights**, the real value in the research we conduct. Our reports must be clear, concise, and focused on the objectives we set out to solve.
- ▶ By the end of our session, I hope you will walk away with the necessary tools to create a concise, thoughtful, and insightful report.

How many times
have you
conducted
research just for
the results to sit
on a shelf and
not be used?



What goes through my mind for planning:

- ▶ What is the business trying to achieve (long- and short-term goals)?
- ▶ How will this activity contribute to growth/profit?
- ▶ What is the brand vision?
- ▶ Core promise?
- ▶ Emotional benefits to customer?
- ▶ Position vs competition?
- ▶ Differentiators?
- ▶ Barriers (internal as well as external)?
- ▶ Market changes and impact on brand, category, industry, region?



Starting with Project Plans

- ▶ Help avoid the, “**that’s not what I was looking for**” statement that we sometimes hear in presentations
- ▶ Ensures your key business partners have thought through what they will be doing with the insights and ensures the objectives are appropriate
- ▶ While they take time upfront, they save time in the end
- ▶ Used to drive the Analytic Plan

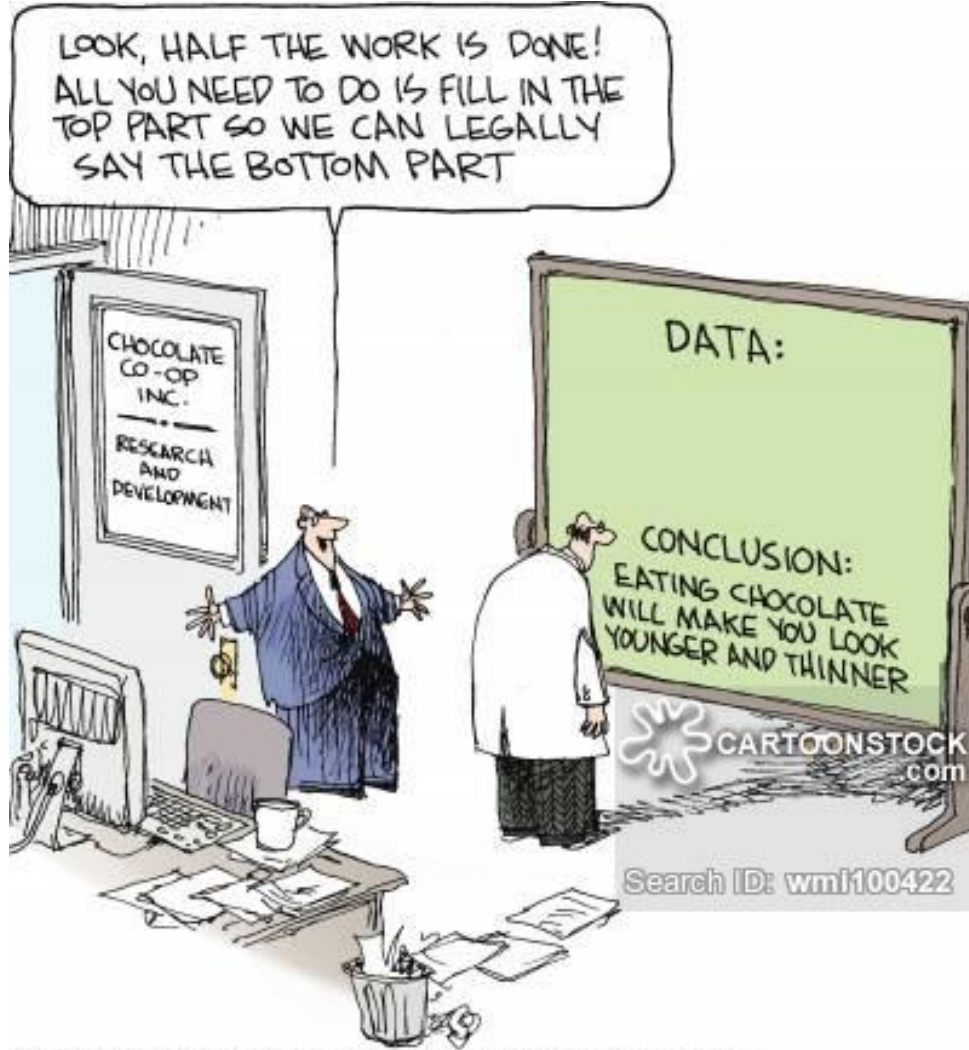
Project Plans: What is included

▶ **The key portions include:**

- ▶ Background (2-3 sentences)
- ▶ Objectives (2-3 objectives max)
- ▶ Key questions to answer (bullet points)
- ▶ Target audience
- ▶ Resulting action (how results will be used)
 - ▶ Including hypotheses here is beneficial

▶ **Get buy-in/sign-off from business partner**

- ▶ By having the business partners think through these parts, we have found:
 - ▶ The research to be better/more powerful
 - ▶ Survey targeted to answer right objectives
 - ▶ Ease in providing clear, actionable recommendations



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How do we use the Project Plan to create a successful, insightful report?

Analytic Planning

How many of you like a good mystery?



Isn't that what research is?

Analytic Plans: **How it helps**

- ▶ **Ensures you have all necessary questions in your survey**
- ▶ **Start thinking about the story – *before you see the data***
 - ▶ The data should not be driving the story. The data should be supporting the story.
- ▶ **Start thinking about analyses, visuals**
 - ▶ Build hypotheses and think about alternative analyses if results are not as expected

Analytic Plans: **Prior to launching**

- ▶ **Line up survey questions with objectives in Project Plan**

- ▶ This allows you to see how various questions can be combined to formulate one answer
- ▶ Also ensures you are not missing questions in survey

- ▶ **Create hypotheses and 'what-if' scenarios**

- ▶ Use past research, secondary data, or your gut
- ▶ Use this information to potentially add a question or two to help flush out the story further
 - ▶ *Nothing worse than saying post-field, "I wish I asked..."*

Analytic Plans: **While in field**

- ▶ **Create an outline for your story using the Analytic Plan**
 - ▶ Base this outline on your objectives and the resulting action points from the Project Plan
 - ▶ Think through ideas on how you can show the answer in a pictorial way
 - ▶ Ensure your outline is telling a story that flows from one idea to the next with the last point being the insights to guide the resulting action
- ▶ **Build upon your outline by using your hypotheses**
 - ▶ If supported, what else would you examine
 - ▶ If refuted, what else should you examine to understand why hypothesis not supported
- ▶ **Your ideas might change once you begin building the story**

Analytic Plans: **After field**

- ▶ **How does the data align to your original hypotheses? How is it different? Why might that be the case?**
 - ▶ What other pieces of data do you need to look at to help answer why hypothesis was not met
- ▶ **Does your story outline still flow or do you need to rearrange things?**
- ▶ **What other pieces of insight can you combine on one slide to flush out the story?**
- ▶ **What secondary sources are available to make the story stronger?**
 - ▶ Social Media, internal customer information, Nielsen media spend, etc.

Analytic Plans:

As list

▶ Main Objective:

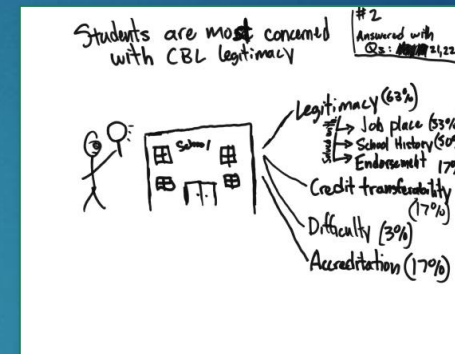
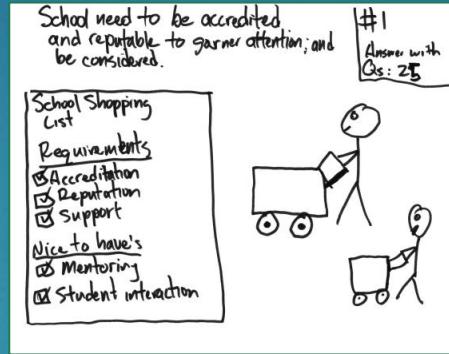
- To determine which CTAs have the highest combination of appeal, intent, and impact on attitudes to our brand in order to determine the optimal go-to-market strategy.

▶ Structure of Report:

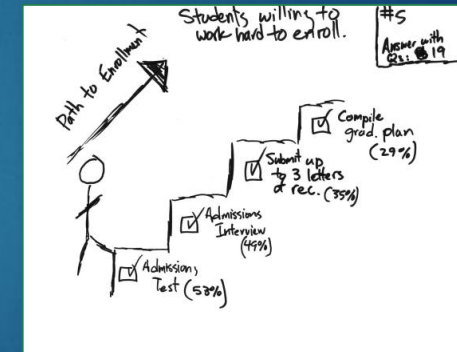
- Introduction/Background/Methodology/Description of CTAs tested
- Summary of Main Findings
- Overall CTA results --- show as green/yellow/red coded dots on chart (Qx, x and x)
 - ▶ Hypothesis: *xx messaging appears to have best breakthrough and it is clearly linked to our brand... & clearly communicating its key message of being career focused...*
 - If hold true, are career focused perceptions moving in the right direction/gap widening with competitors; If not... review x, y, z
- Sub Group Analysis:
 - Slides that graphically show major differences and similarities by important subgroups
 - NOTE: Only subgroups that show significant differences between each other or to Total will be shown here
- Conclusions/Recommendations

Analytic Plans:

As slides



Program Attributes



In the end...

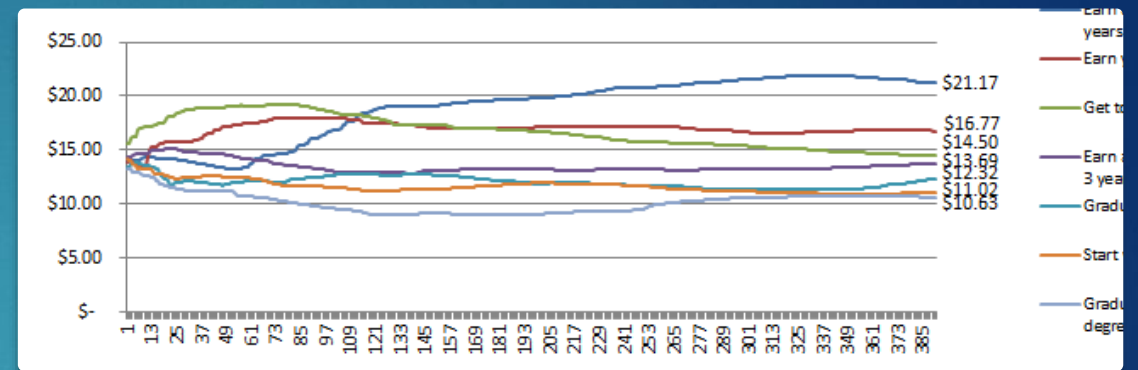
To Plan or Not to Plan



When an Analytic Plan is not used...

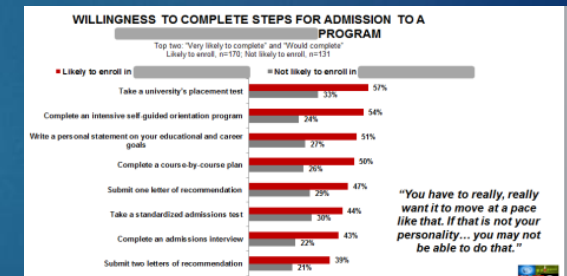
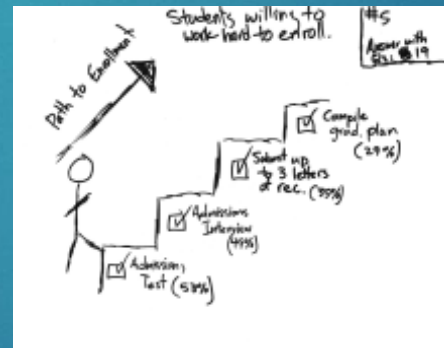
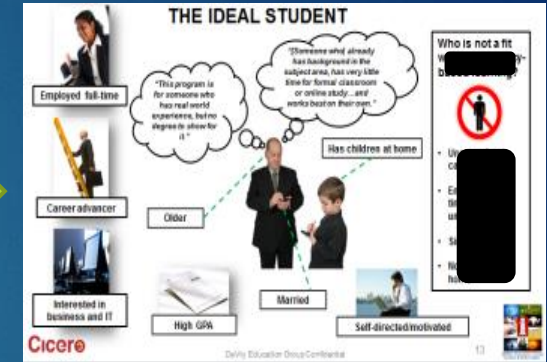
there are several more iterations of the decks before final.

This leads to missing deadlines and frustrating business partners who need actionable information for decisions.



In this example, the \$ allocation was the vendor's methodology to get to our objective answer. The business partner didn't care about the amount of money spent. It was about which message would have the strongest impact.

When an Analytic Plan is used...





"After careful analysis of all 437 charts, graphs, and metrics, I've decided to throw up my hands and go on a week-long bender. Who's with me?!"

Building the story

Building the story: Pulling it all together

- ▶ **Bring data to life with visualization**
 - ▶ **Synthesize** several questions and pieces of data onto one page
 - ▶ Think about how you can best **represent** this **pictorially**, without making it a data table
 - ▶ What **patterns** or **trends** are you seeing – across brands/within metrics, within brands/across metrics, across time periods, overall

What to include or not include in your story

- ▶ **Think about Goldilocks and the Three Bears**

- ▶ Are the numbers necessary?
- ▶ Do the numbers add information?

Let the story dictate the data you need to show
rather than letting the data dictate the story

Thinking ahead to headlines... (bonus section)

Writing solid headlines is a skill to be practiced. A lot of rewriting will occur.

The question I am frequently asked is 'when do you know your headline is solid?'

- ▶ Do not rewrite the data/information on the slide in your headline.
 - ▶ The reader can see the data. Tell them what it means and why they should care about what is on the slide.
- ▶ After reading the headline, if you can ask 'so what' then you can take the headline further. Keep rewriting/refining.
- ▶ Is the headline written in plain English?
 - ▶ Your report headlines should be simple yet informative.
 - ▶ We don't want the reader to have to re-read the headline several times or feel uninformed when they do not understand what they read.
 - ▶ Writing big fancy words does not make a deck better.

Planning up front leads to a more insightful story that in turn leads to driving action

- ▶ Business partner feedback
 - ▶ On time, if not early, delivery of report
 - ▶ Insights rather than numbers
 - ▶ Recommendations that respond to actions the team wants to take
- ▶ Research vendor feedback
 - ▶ “Creating an analytic plan helped us first by **ensuring** we truly **understood the business and research objectives** of the project and that we were asking the right questions to get the information we needed – you can’t fix in analysis what you boggle in design. The analytical plan also helped us **quickly translate our data into actionable insights**, because we already had thought through what analyses we needed to run to meet our research objectives. **This absolutely saved us time** in the long run and **made for a much better analysis.**” – Cicero Group

Summary: Steps for writing a story

- ▶ Write out your objectives
- ▶ Align questions in survey to each objectives
 - ▶ Questions can go under multiple objectives
 - ▶ Think of how you might combine questions or show it, write it down immediately/draw a sketch of the picture
- ▶ Create hypotheses for each objective
 - ▶ How do the aligned questions help you prove/disprove hypothesis
 - ▶ If reject hypothesis, what else can you look at? Filters/data cuts, other questions, internal data etc.
 - ▶ Why do you think the hypothesis may be wrong?
- ▶ How can you display the insights from your hypotheses?
 - ▶ Think how combined questions can be used in a different way
 - ▶ How can you show the data by giving the answer, as opposed to showing numbers in a chart?
 - ▶ Think carefully about your colors – colors matter. Set parameters upfront.
- ▶ How else might you want to look at the data?
 - ▶ Data cuts, comparisons/alignment between questions
- ▶ Above all else: **BE CURIOUS AND ADVENTUROUS**

Questions?



Contact Information

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