

The logo for Ziment, featuring the word "ziment" in a lowercase, sans-serif font. The letter "z" is green, and the remaining letters "iment" are black. The text is centered within a white rectangular box that is superimposed on a larger green square background.

ziment

The First Annual Meeting of

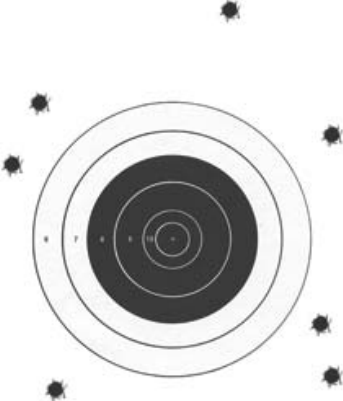


September 16-18, 2007
Philadelphia, PA

What is a “strategic project” anyway?

- Initiative that has the potential to completely change / define brand or company strategy
 - Segmentation
 - Market Demand Modeling
 - Positioning
 - Message Optimization
 - Clinical Trial Optimization
- Project that has the potential to change / define a researcher’s (and research partner’s) reputation within an organization
 - It’s not an every-day occurrence
 - And it’s often very visible and / or politically charged

Why do research initiatives sometimes miss the target?



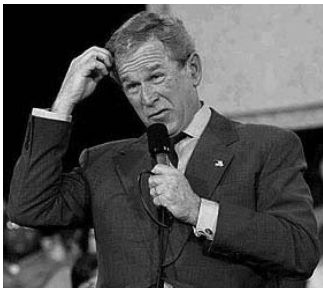
Or worse, turn into a . . .



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Is it typically a result of a market research or technical decision...?

- Determining the proper scaling technique to use on a battery
- Selecting which specific decision-modeling approach to employ
- Using the right multivariate analytic



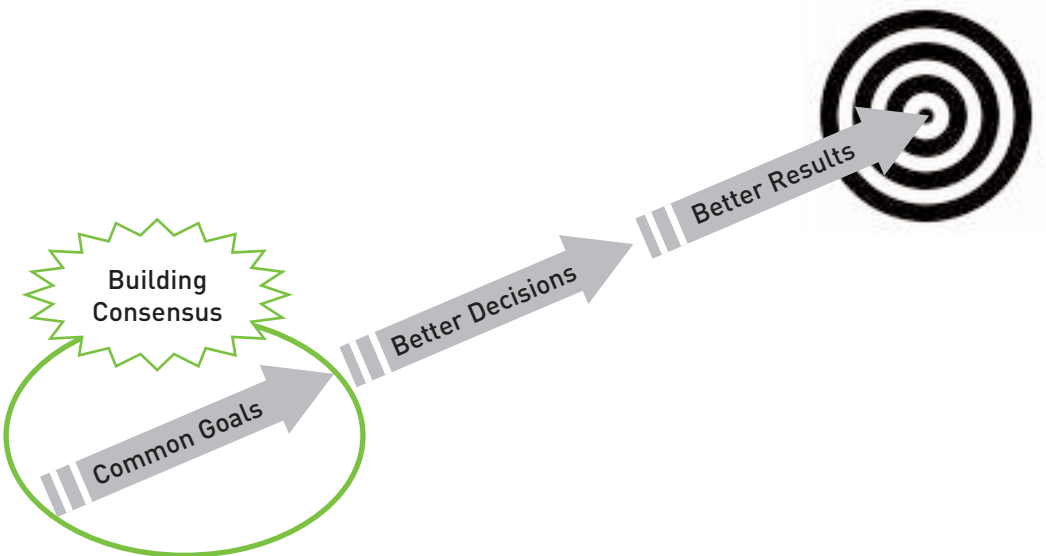
Or, is it we sometimes fall short on . . .

- Defining critical business issues
- Ensuring all stakeholders' needs are addressed
- Building consensus on how research will impact decision-making and what action will take place
- Managing expectations

**Although it seems obvious and easy . . .
it's not, and we don't always do it consistently for a lot of good
(and not so good) reasons.**

**Common Barriers
to
Project Success**

Why worry about building consensus?



What are the benefits of building consensus on strategic initiatives?

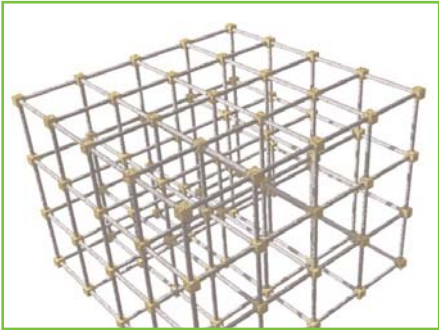
Group Benefits

- Group-think offers a more holistic, richer perspective
- Fosters teamwork and develops a stronger working-culture
- Defines roles and results in more efficient division of labor
- Allows navigation of political environment

Personal Benefits

- Secures buy-in from your internal customers
- Provides greater assurances that your work will be on target
- Allows you to set expectations
- Showcases MR / Agency
- Affords opportunity to demonstrate personal leadership skills

Framework for Building Consensus



Purposeful Process ➡ Drives Different Behavior ➡ True Consensus

Core Stages for Building Consensus

- 1 Problem Identification
- 2 Participant / Decision-Maker Identification
- 3 Convening to Define Issues & Process
- 4 Gather Information
- 5 Analysis
- 6 Decision-Making / Acceptance
- 7 Implement

Applying Framework to Market Research

Stages of Building Consensus

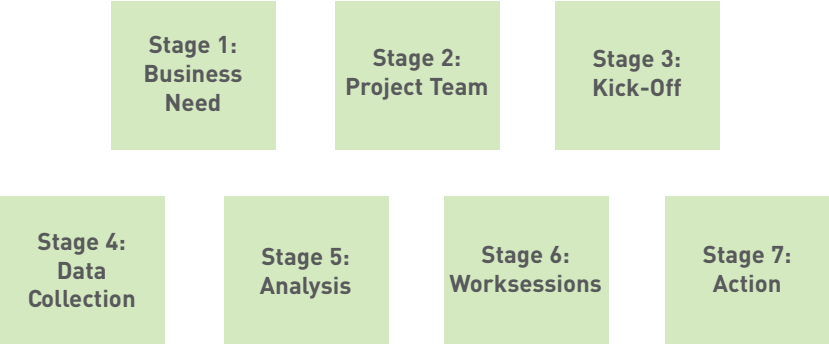
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Project Stages

- 1 Identify Business Needs
- 2 Select Project Team
- 3 Kick-off Sessions
- 4 Data Collection
- 5 Analysis
- 6 Worksessions
- 7 Act on Research Results

Project Management Framework for Building Consensus



Stage 1: Setting the Stage



Stage 1: Setting the Stage

Goals

- Identify that research need exists
- Confirm other key stakeholders agree that research need exists (at basic level)
- Create preliminary definition of the need (research purpose / core business question)
- Communicate research need to potential research partners (RFP)
- REMEMBER – a deep dive of business issues/challenges will follow

Identify Business Need

Players & Roles

- Client leads effort to confirm basic need among Sr. Mgt, Mktg, and others.
- Communicates need to potential research partners
- Research Partners create proposal to outline recommended methods, project timelines, costs, etc.

Tips & Techniques

- Gather opinions, thoughts, and suggestions from core internal customers
- Use clarifying questions to understand different frames of reference
- Refrain from being judgmental, or pushing your position too early
- Set positive, enthusiastic tone for the project and ensure key stakeholders know the value of their participation

Stage 2: Who should be involved?

Goals

- Identify, recruit key stakeholders who have vested interest in project
- Ensure cross-functional participation, as needed (Sr. Management, Marketing, Sales, Clinical, Outcomes, etc.)
- Select Research Partner / Consultant
 - Evaluate objectively in obvious areas such as methodology, appropriateness of timing, and cost
 - Ensure that the partner is a good cultural fit for client organization
 - Consider personalities

Select Project Team

Players & Roles

- Sr. Mgt. - Core strategy, mandates participation
- Mktg. - Buys-in to research need & reinforces participation-mandate
- MR - facilitates and coordinates team recruitment and scheduling

Tips & Techniques

- Ensure TOP-DOWN Buy-in
 - Strategic projects require Sr. Mgt. support/mandate
 - Sets clear communication on project importance
- Identify key political influencers in each department
- Cover waterfront of opinions, perspectives
 - Don't shy away from challenges
- Critical to embrace potential "spoilors" of consensus *now*, instead of dealing with them *later*

Stage 3: Bringing Everyone to the Table

Goals

- Establish leadership of project
- Discuss broader, strategic business issues (not just research objectives) & gain consensus
- Hypothesize on research outcomes & how results will be acted on by various stakeholders
- Raise potential challenges
- Gain buy-in on research plan
 - Review sampling plan
 - Discuss pros and cons of different designs/methods and why one is optimal
 - Describe key outputs/deliverables
- Gain alignment on project schedule & everyone's responsibilities for keeping the project on track

Kick-Off Sessions

Tips & Techniques

- Schedule a significant amount of time well in advance to allow for rich discussion.
- Clearly communicate in advance the importance of full attendance & engagement.
- Know the players in the room, their agenda, and how to manage them
- **PREPARE** - Outline a meeting roadmap
- Take full advantage of your research partners
- Set the appropriate meeting tone
- Consider using consensus-building techniques
- Follow-up with written document to confirm team's decisions, project milestones, and next steps.

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Kick-Off Sessions

Players & Roles

- MR – (Client or Agency) leads session
- Sr. Mgt. – Communicates core strategy
- Mktg. – Brand strategy, tactics, and needs
- Other brand units weigh in on relevant areas of expertise

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Stage 4: Witnessing the Work

Goals

- Ensure participation of key stakeholders in research
- For Qualitative Phases
 - Schedule an internal meeting to review Discussion Guide with key players
 - Make participation mandatory in at least 1 market for everyone
 - Conduct in-depth debrief session to review insights
 - Gather consensus on key findings and renew or revise quantitative direction
- For Quantitative Phases
 - Meet to review instrument
 - Conduct Expanded Pre-Tests to view instrument operating live

Data Collection

Players & Roles

- MR Client – ensures full engagement throughout fielding
- Mktg. & other internal partners – Attend / participates in-person
- MR Consultant – actively listens to client feedback & evolves research logistics as needed to ensure client engagement

Tips & Techniques

- Take into account various stakeholders' schedules to ensure engagement and ability to attend.
- Provide video-streaming options for those not able to attend live.
- Ensure a MR presence at all locations.
- Plan debrief well in advance
- Coordinate with research partners to bring clear, concise, and actionable insights to the team.

Stage 5:
Analysis

Stage 6: Making Decisions Together

Goals

- Review primary research output
 - Not a report on all results
- Discuss marketing and other internal implications of data and how it defines/fits strategy
- Secure consensus on steps forward and final deliverable needs
- Ensure richer perspective for Research Partner to develop a more tightly focused, strategic report with actionable recommendations

Worksessions

Players & Roles

- Research Partner typically leads meeting
- MR Client – ensures team participation

Tips & Techniques

- Schedule at least 3 hours
- Set expectations – NOT a final report, but a working document
- Ideally conduct 2 Worksessions

1st Worksession: MR only

- Initial review of data
- Collaborate on how best to take data forward to broader team
- Predict internal questions & agendas
- Sanity check

2nd Worksession: Broader team

And then what happens?

Stage 7: Rolling Out and Integrating Results

Goals

Broader Team Presentation

- Present final report to entire team and discuss how best to integrate work into organization
- Confirm potential core strategies/tactics to pursue and determine what key brand functions/depts will be impacted

Individualized Customer Unit Roll-Out (if applicable)

- Present relevant results to each unit and discuss potential implications and action plans
 - Marketing, Sales, Managed Care, Promotions, Online Communications, CRM, etc.

Action

Players & Roles

- MR Client & Research Partner – collectively present results to broader team
- MR Client (with Research Partner as needed) – rolls out individual customer unit presentations

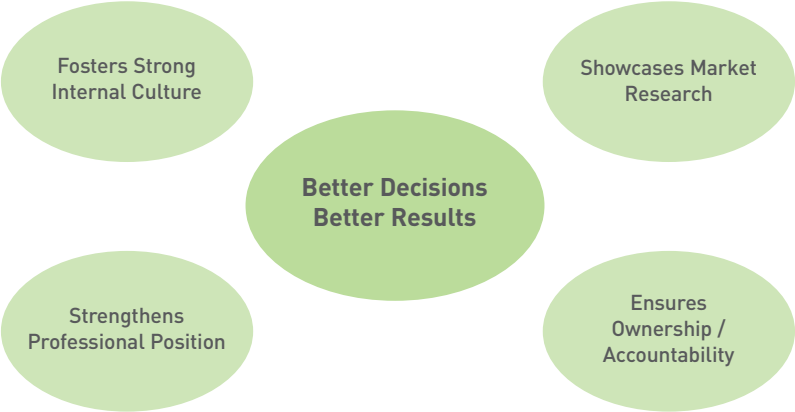
Tips & Techniques

- Utilize white board to outline key action steps & gather follow-up questions
- Close of meeting - go around the room (if appropriate) and gather each person's key takeaways
- Leverage senior management champion to help wrap up and encourage next steps

Key Themes



Key Benefits



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Detailed Linked Slides

What Needs to be Asked?

- What are we really hoping to accomplish with this research initiative?
- In your mind, what are the critical success factors?
- What marketing or sales strategies might be informed? What change in marketing or sales tactics might be pursued?
- What do you anticipate the results will be? Why?
 - If our research finds ... XYZ, what will happen? If it's ABC, what will we do?
- What, if anything, are you most concerned about this research initiative?

What to Include in a Kick-Off Slide Deck?



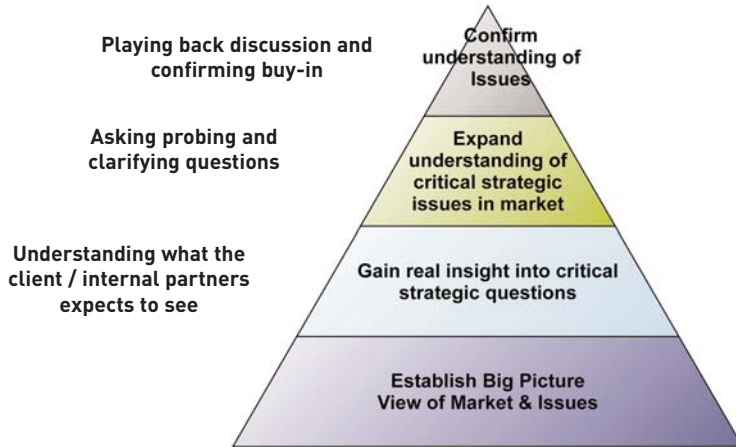
Get the Most From the Research Partnership

- Pre-review existing research & insights to ensure alignment
- Work together to develop documents for kick-off meeting
- Sensitize research partners to existing political dynamics before kick-off meeting
- Leverage agency methodologists/subject matter experts to build credibility in design selection
- Collaborate to establish reasonable timelines
 - Attempt to build in time for typical pitfalls (e.g. additional reviews, recruiting delays, etc.)

Establish an Effective Tone for the Meeting

- Ensure presence of “Senior Management Champion”
- Clearly communicate the role of everyone in the room in defining success
- Keep everyone engaged and ensure everyone has a chance to weigh in
- Be serious, but enthusiastic about the tasks at hand
- Use open, collaborative interpersonal style

PYRAMID – Business Issue Definition



LEAP

Addressing Conflicts/Disagreement

Listen: without judgment, without interrupting.

Empathize: with perspective, working to see concerns from their point of view.

Ask: questions, restating your understanding to make sure you are accurate.

Propose: your thoughts (or others) and potential solutions in collaborative, problem-solving manner.

Business Issues Memo / Briefing Document

- Document research need / situation analysis
- Communicate key business issues, objectives & action standard
- Reiterate methodology & sample plan
- Outline project milestones & timing

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