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Getting the Brief Right

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We Know This

At October's LARIA and LGA sponsored session on the role of research in local government, all three breakout discussion groups spoke about 'getting the brief right' as an enabler for improving the perceived value of research and therefore of researchers.

But, for my own part, I don't recall a great deal of time being spent on just what this meant. It has the feel of a 'known solution': we all know that if we get the brief right at the outset, chances are we will produce a piece of good research.

Still Wrong

It was only later in the day that I found myself puzzling over just what it is that constitutes 'getting the brief right'. Is it possible, I wondered, that you could get the brief right and still get the answer wrong?

Experience has taught me that it is possible to work closely with your client, the person for whom you are either undertaking or commissioning the research, identify clear objectives, produce a technically competent piece of work, on time and on budget, yet still finish with both parties feeling distinctly underwhelmed. So was the brief wrong? Not as such, it's more likely that it set out to address the wrong question.

An Outside View

It is not a new thought to say that we should never accept any problem as initially defined by our clients, but it is worth remembering that they are, as Peter Block says, "giving their best understanding of what they are up against."¹ We, however, have the luxury of the outsider to stand back from the problem and see it in perspective. It is a crucial part of the researcher's job to seek clarification that may well mean we redefine the problem or reframe the question. Sometimes, it can even lead us to a wholly different question than the presenting one. And, subsequently, we may recommend that they pursue some other course of action rather than use our particular skill-set. Whether this is the case or not, we will certainly be on the way to being a real help to them in their work.

By way of an example, some years ago I was asked to help some librarians with a project to identify how libraries could be made to appeal more to both customers and non users. As well as a survey to measure the opinions of the service as it stood, we conducted separate focus groups to ask customers and non users what changes they

would like to see that would encourage them to use libraries more. The work was carried out well, but when the results were presented to management their response was one of disappointment. "Didn't they mention signs above the aisles like in supermarkets?" one of them said. "How about using them for young people's evenings?" asked another. The list of possibilities went on and on and I quickly realised that if I had challenged my client more at the outset I would have found that the presenting problem was not how to ask the customer/ non customer what they want (I now know this only ever provides very limited returns anyway) but rather how to test all our various ideas for innovations on the public? Nowadays, having fully explored the situation, I would urge them to forego research and pilot the ideas in selected community libraries. There is after all no substitute for studying what actually happens when you make a change to a product or service.

Next Time Start Here

With this in mind, I wanted to share with readers some practical questions to ask yourself before you get too far along the road to putting the brief together. In so doing, I am indebted to two excellent articles on this subject, one by Margaret Morgan and Kelly Allan², the other by David and Sarah Kerridge³.

Before you put together the brief consider:

- What is your client's aim? What are they going to do with the data you generate? A really good way to address this is to ask them if they had the information tomorrow, just like that, without all the tedious effort of surveys and such like, what would they do differently in their work?
- Then ask your client why this particular piece of information would give them the confidence to make the change and not some other? Perhaps get them to complete the statement 'I am prepared to implement change based on the results of this research project because...'
- Consider with your client whether they could get the information they need from existing records. They may answer that the internal records are not accurate enough or perhaps they are relatively inaccessible. Such problems are seldom insurmountable and if they are likely to throw light on the problem in question it could well be better, not to mention less expensive to follow this path. It would certainly be to the long term benefit of the organisation to improve the records and make them an on-going source of valuable feedback.
- Ask your client whether they have considered that maybe their front line employees already know the answers? This is sometimes more difficult than it should be and their answer might lead you to conclude that they perhaps tend to ignore their staff, maybe because they are worried about the answers they will get. Or worse, maybe their employees are afraid to tell them the answers.

- Jointly consider whether a research project will provide reliable enough answers. Maybe there is the opportunity to trial some changes, change the system in some way and then see what really happens, rather than ask people what they might do in a given circumstance. As Peter Scholtes says, “Observable data are preferable to opinion data.”⁴
- Finally, if you are an ‘in-house’ researcher, you may well know that your client has undertaken similar research before, which has failed to lead to action. To avoid this happening again, explore why this is the case. Did they doubt its validity? Were the wrong questions asked? Maybe they did not know how to use the results?

If, after running through these questions, you decide to proceed, you should be in a position to put together an excellent brief from a base of a shared understanding of what is needed and why. The foundations will be in place to design and execute a piece of research that will leave your client with the knowledge they need to make a difference, which surely has to be the best way to enhance the reputation of research and researchers.

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- 1 The Flawless Consulting Fieldbook and Companion: A Guide to Understanding Your Expertise, Peter Block et al, Jossey-Bass/Pfeiffer (2001), page 393
 - 2 Efficient, Effective, Inexpensive Marketing Research, Part II: Knowing Whether Market Research is in Your Best Interest ... and When It Isn't, Margaret Morgan and Kelly Allan (2000), www.kellyallan.com
 - 3 What Do Customers Want? , David and Sarah Kerridge (1998), <http://www.ucl.ac.uk/~uczcw11/quality/4>
 - 4 The Leader's Handbook: A Guide to Inspiring Your People and Managing the Daily Workflow, Peter R. Scholtes, McGraw-Hill (1998), page 237