

the researcher as consultant

by John V. Gelder, CMRP

Market researchers are often called upon for their strategic advice. Having sifted through the data and carefully weighed all the objective evidence, we are deemed to be uniquely qualified to advise the client through whatever conundrum he or she may be facing. But just how well equipped are market researchers to provide advice on the “big picture” strategic issues with which their clients are struggling? Do market researchers truly have a firm grasp on the salient issues that are important to management? Or are we so deeply consumed by the process of collecting and analyzing the numbers that we risk losing sight of those larger strategic issues?

In my years as a researcher and consultant, I have observed that most people view the world primarily out of one end of the telescope. Those looking through the narrow end see the world unfold in broad strokes; they are comfortable with generalization and have no trouble with ambiguity or abstract conceptual thinking. On the other hand, those peering through the wide end of the scope see a world of incredible detail; they are comfortable examining the minute parts that make up the whole

and in so doing, they leave no stone unturned. These contrasting views are equally valid; each has its strengths and each its limitations. But when one view is taken to the exclusion of the other, problems can arise. The challenge for the researcher is, first to be cognizant of which end of the telescope represents his or her primary mode and second to compensate for limitations by making a conscious effort to refocus the lens towards the opposite end of the perceptual spectrum. In short, we must teach ourselves to become both forest people and tree people so that we may provide optimal value and insight to our clients.

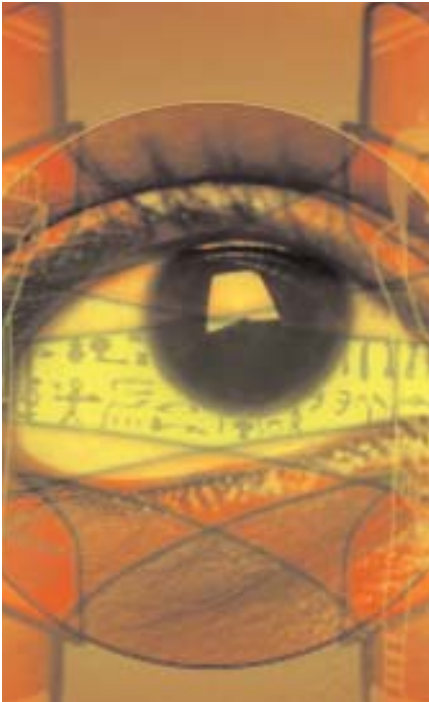
No client I know buys research because it’s nice to have; they buy research because they have important decisions to make or problems to solve. In other words, market research is a means to an end, not an end in itself. This may seem trivial or trite to say, but it is not uncommon for researchers to get so caught up in the intricacies of design, methodology, data collection and reporting that we ignore the larger issue of how our research will be used to make a difference for the client. Rather than helping to solve management problems, we tend to



focus instead on winning the business, doing research and writing the report. This “production mindset” treats research as a finite process, one that ends when the report is handed off to the client, at which point it is time to move on to the next project. This approach does a disservice to the researcher and diminishes the value of his or her output. Fortunately, there is a better way; and that better way is for the researcher to cultivate a “consultant’s mindset” aimed at adding value to client relationships with no corresponding increase in cost.

LEARNING THE LANGUAGE

There are three key pillars upon which researchers can develop a “consultant’s mindset”. The first is to learn to speak the language of management. The market research industry, like other professional sectors, has developed a unique vocabulary to describe what it does. Not surprisingly, researchers use that vocabulary to communicate to clients and prospective clients who are typically managers in business or government organizations. These managers may not be well versed in the language of market re-



search but they are generally quite familiar with the language of management. They are almost always dealing with core issues related to planning, organizing, leading, developing and monitoring. Most are preoccupied with delivering on planned commitments, recruiting and developing staff, managing change and meeting accountabilities. Generally, their performance will be measured against a pre-determined set of performance metrics.

Researchers who take the time to study and understand the theory and language of management, will be better able to speak in a language that managers can understand. For their part, managers will take comfort in knowing that you appreciate the issues and pressures that are keeping them awake at night, and they will have greater confidence that your research results will help them solve practical and relevant problems.

UNDERSTAND THE ENVIRONMENT

The second key pillar on which to build the consultant mindset is to take the time to understand the context and

environment surrounding the research project. Every organization has a distinct culture and every research project takes place within a larger organizational context. For example, a corporate client may be facing the stress of increasing competition or falling sales and profits; employees may have just gone through a round of downsizing and morale may be low among the management team. The researcher will need to be cognizant of the management sensitivities that can exist in such an environment. On the other hand, the dynamics of government can be quite different. A government department may have a need to evaluate a multi-stakeholder pilot program. There may be tensions between stakeholders with each having different expectations with respect to research outcomes. Furthermore, the research has the potential to affect the political landscape, the media and the public policy environment. The researcher will gain from understanding the implications and possible repercussions of the research for various stakeholders as well as management's level of risk tolerance for the research results. And finally, the manager for an innovative small business enterprise on the cusp of a disruptive technological breakthrough may be preoccupied by the need to preserve secrecy and confidentiality. It behooves the researcher to take the time to understand the nature of such concerns and to conduct the research and subsequent communications with the utmost discretion. In all cases, the researcher will gain the confidence of management, not by dazzling the client with his or her knowledge of arcane research terminology and methodology, but by demonstrating sensitivity and empathy to management's the top-of-mind issues and concerns.

APPLY THE RESULTS

The third pillar on which the consultant mindset can be set, is to focus on how the research will be used to make a

positive difference to the client and the organization. All too often the research process ends with the tabling of the final report. Scant attention is paid by the researcher to communicating results for the purpose of supporting change or decision making. Researchers who make it clear to managers that they care about how research results will be used, and who are willing to invest time and effort to collaborate with managers on putting results to work, are much more likely to gain the trust and confidence of clients than those who simply show their eagerness to move on to the next project. Just like the strategy that can never be implemented, the research findings that are never applied to a change or decision-making process are of little consequence.

In summary, being mindful of the three pillars on which researchers can develop a consultant's mindset is the first step towards providing enhanced value to the client. The three pillars are: a) learning to speak the language of management; b) taking the time to understand context and environment surrounding the project; and, c) focusing on how the research will be used to make a positive difference for the client and the organization.

By paying attention to these pillars, researchers will be able to maintain and demonstrate a more balanced perspective between the narrow abstract end and broad detailed end of the perceptual telescope. In so doing, we will be better prepared to share perspectives and insights with clients in ways that they can truly comprehend and in the process increase our worth as trusted strategic advisors.

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Postscript - This article is written from the perspective of researcher as consultant. There is another "reverse angle" lens – that of "consultant as researcher". But that is food for another day.