



# **A guide to building agile research functions in-house**



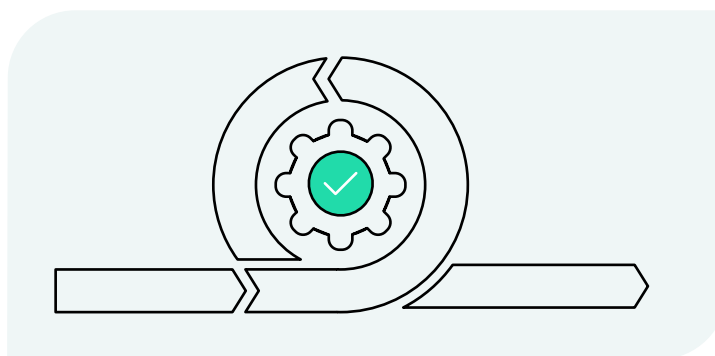
# Table of contents

3	<i>Introduction</i>
5	<i>The right team</i>
12	<i>The right tools</i>
17	<i>Why Qualtrics</i>

# Introduction

## IN RESEARCH TODAY, AGILITY IS THE NAME OF THE GAME.

Companies of all sizes are facing new market, competitive, and internal realities as they strive to respond to the global pandemic. Agile insights are more important than ever during these times of disruption – and agile insights require agile teams.

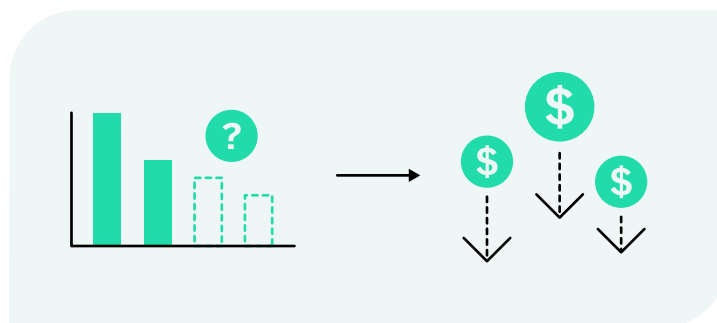


As a research and insights leader, you're quite familiar with the challenging demand of delivering more research, analytics, and reporting, while facing budget and resource constraints. But now you're dealing with additional pressures.

No one could have foreseen how the global response to the virus would – in a matter of weeks – drastically alter how people shop, what they shop for, and how much they spend. These changes have rendered your existing insights on consumer perceptions and purchasing trends moot, making it prudent to update research that you likely hadn't planned on conducting this year.

## Introduction

And now that new research is necessary, businesses are spending with caution and reducing budgets in the wake of economic uncertainty. Couple these cuts with furloughs, staff reductions, and hiring freezes, and you're likely struggling to figure out how to deliver insights that are so critical to short- and long-term success.



To control costs and provide value to the business, insights team leaders are rethinking what makes a minimum viable team. As you take steps to create the research function that makes the most sense for your organization – now and in the future – consider the best practices included in this ebook.

SECTION 1

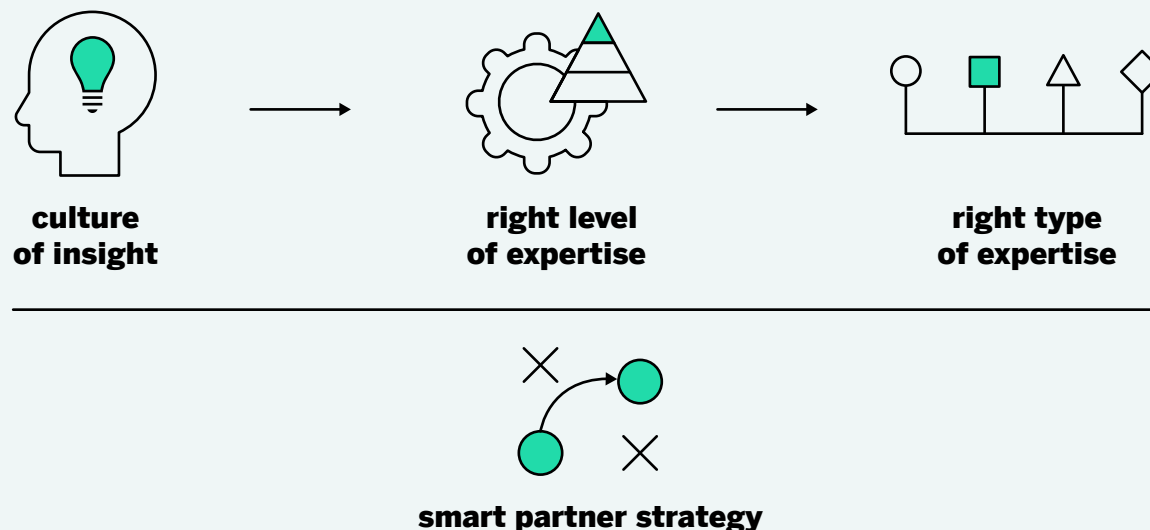
# The right team

## The right team

### RIGHT-SIZING YOUR RESEARCH TEAM

Research isn't one-size-fits-all. Depending on your company's readiness to invest in an in-house research function, your team likely won't look like the teams at peer organizations. Even fully mature research outfits look drastically different from one to the next, as each team is custom-built to meet the specific needs and priorities of its parent organization.

There is no right or wrong way to build a research team. Just be sure that as you grow, your research organization can effectively support your business – and vice versa.



## The right team

### CULTURE OF INSIGHT

Does your organization understand the value of insights? Will it support you with the appropriate budget, tools, and data access? Will it listen to what insights have been uncovered and use them to take action? If you answered no to any of these questions, you must first prove that insights can add value to your organization.

Front-load your insights team with research managers who are not only adept at working with or manipulating data to find key insights, but who can also serve as research evangelists or “data spokespeople.”

Ideally, these team members have strong generalist experience as practitioners and are proficient at managing research projects with external vendors; this will enable your team to flex to diverse needs. It’s also critically important that these team members are bilingual – they must speak the language of the business AND the language of insights, as they will find themselves playing the roles of research practitioner, translator, influencer, and advocate all at once.

#### HIRING TIP!

Be upfront with your recruits about what the role entails. To sell the value of research, they must have a passion for building something from scratch and a willingness to persuade.

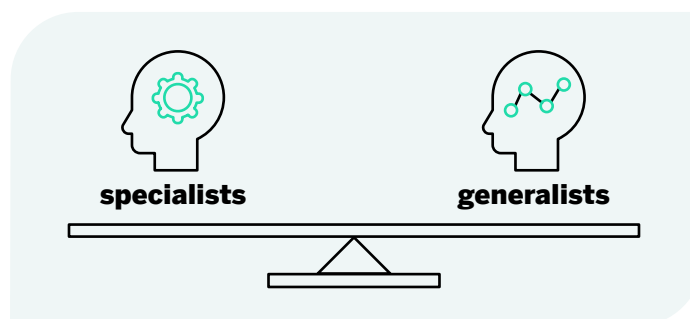
## The right team

### THE RIGHT LEVEL OF EXPERTISE

When you're ready to start adding more research practitioners to your team, you must determine what level of expertise is right for your organization: generalization or specialization.

Generalists tend to be expert navigators of the research toolkit and are often adept at managing a range of external partners when specific in-house expertise is lacking. Specialists, on the other hand, bring efficiency and depth to your organization, as they can jump straight into projects without having to ramp up on new methods. That said, practitioners of both stripes ought to come with a learning mindset, as it will never be possible to hire for every potential research need.

Ultimately, a team comprising both lateral and vertical thinkers can help your organization be more efficient and creative with research. While specialists can do a few things extremely effectively, generalists can help make sure that you're applying the best methodologies – not just the most familiar – to your organization's critical research questions. This balance of skill sets will help your team be the effective, versatile function that your organization requires.





## The right team

### THE RIGHT TYPE OF EXPERTISE

So when it comes to finding specialized talent, what types of research skill sets should you build out? To answer this question, start by identifying the key things you must understand – like who your customers are, what differentiates your brand, the customer journey, and the employee experience.

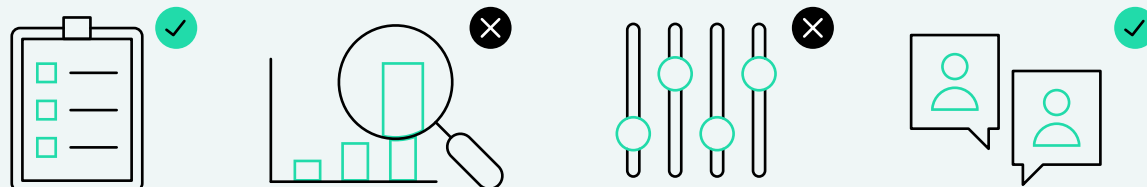
Then pay special attention to your organization's strategic plan, as it identifies key initiatives and associated importance, size, and scope – all of which translate to staff allocation or hiring. Based on the strategic plan, answering these questions will help you ascertain whether you have the right type of expertise in house:

- + What do we know – and what do we need to know – to successfully execute these initiatives?
- + What learning plans should we build to get to the right insight?
- + What research methods and approaches should we apply to get answers?
- + What types of expertise and tools will successfully enable the research?

## The right team

Depending on your responses, you may find that a specific skill set will serve a particularly frequent – or strategic – need within your organization. For example, some organizations may find that they require expert survey methodologists or advanced analytics experts, while others may want team members who can run tight focus groups or social media analyses.

Hire for your most strategic and frequent needs first – and rest easy knowing that you can lean on external partners to fill gaps when necessary. As your team continues to prove value, you will be able to grow your in-house capabilities over time.



## The right team

### BUILDING A SMART PARTNER STRATEGY

As you build out your team, remember you can augment capabilities with research partners. A good rule to follow: If you can't do a project in-house better than someone else can, you won't be more efficient. That's what partners are for.

Before you bring a partner on board, think carefully about why you need them and what kind of relationship you want to have with them. And always have a firm understanding of what you would be willing to compromise on.

- + Are you looking to supplement your team's skill set? Search for a partner with a proven track record in that area. The partner should willingly share examples of their work and provide proof of methodological rigor, so you can be confident in their results.
- + Is it necessary to quickly increase your team's bandwidth? Find a partner with a flexible engagement model, as this will enable them to spin up quickly, staff your project consistently, and flex with your needs.
- + Do you want someone you can rely on for one-off, specialty engagements? Choose partners with experience in your category and market, as this will reduce your oversight burden as they ramp up.
- + Are you looking for a more consistent, longer-term extension to your team? Make sure the partner you choose can provide a consistent, dedicated team who will challenge you from time to time, rather than simply taking orders.

Regardless of the stage you're in, you're never alone if you have the right partner.

SECTION 2

# The right tools

## The right tools

### TECHNOLOGY THAT WORKS WITH YOU

Your in-house research function requires more than a team. You should ensure your staff has the right technology to do their jobs effectively and efficiently. If your lean team is to remain agile and productive, they can't spend precious time managing multiple tools and vendors. Consolidation on a single technology platform will enable them to stay focused on answering business-critical research questions. Not to mention, your budget holders will thank you, too.

#### The ideal technology platform

- + Is easy to learn
- + Is versatile, not singularly focused on a certain area of research
- + Has embedded knowledge to make your team even stronger
- + Consolidates multiple data sets, creating a holistic view of your research
- + Eliminates data silos within your organization
- + Is customized to address your organization's specific requirements
- + Provides dependable customer support
- + Has a robust roadmap to demonstrate a commitment to continuous improvement

## The right tools

### RELIABLE DATA THAT MEETS YOUR NEEDS

We've all heard the saying, "garbage in, garbage out." And that adage definitely holds true for research. Without the right data, the right tools are useless.

Consider the types of research your team will conduct most often, and then understand the types of internal and external data inputs that will inform that research, for example:

- + Operational data for attribution modeling
- + Customer reviews, contact center metrics, and purchasing history for customer loyalty and retention analysis
- + Online sampling for market research surveys
- + Product consumption data for market segmentation, customer profiling, and market share analysis

Armed with this bigger picture, you can ensure you've equipped your team with the right data collection and analysis technologies PLUS access to the right types of data inputs.

## The right tools

### SMART ACCESS AND GOVERNANCE

Building an agile research function isn't just about establishing an organizational structure; it also means democratizing your insights. After all, research is only valuable if the right people have access to the right insights at the right time.

#### Key steps to turning insights into action

- + Eliminate bottlenecks and data silos that lead to business units choosing alternative tools to manage their own research systems.
- + Effectively disseminate information through real-time dashboards and targeted alerts.
- + Empower key teams inside your organization to find insights themselves, while establishing guardrails to ensure quality and consistent methodologies.
- + Generate recommendations based on the insights and automatically direct them to the people in the best position to effect change.

## The right tools

With access comes increased scrutiny on security. New regulations and growing consumer concerns have elevated the need to maintain control over data ownership. Manually redacting or deleting data creates busy work for your time-strapped team, but if data collection policies are ignored, your organization could be exposed to costly fines or data breaches.

Organizations that use multiple platforms are five times more likely to expect fines for noncompliance with GDPR.

To ensure compliance with GDPR and any applicable industry-regulations (e.g., HIPAA, FERPA), your in-house research team and any technology you use should adhere to these controls:

- + Redact and/or restrict the collection of personally identifiable information (PII).
- + Quickly and easily address GDPR “Right to Erasure” requests.
- + Keep data safe from unauthorized users, even those within your organization.
- + Properly store data to maintain confidentiality, integrity, and availability.



SECTION 3

# Why Qualtrics

## Why Qualtrics

### QUICKLY SURFACE THE RIGHT INSIGHTS

Through the combination of the robust Qualtrics technology platform and our unrivaled research support and expertise, you have the power to do more with less – regardless of the size of your team or your budget.

### Make sophisticated research simple with precise and productive solutions.

#### ExpertReview™

Uses artificial intelligence to detect and remove quality gaps at all steps of the insights lifecycle – eliminating the painful and costly errors that come from poorly designed studies.

#### XM Solutions

Standardizes research methodology and ensures quality through prebuilt or customized expert-designed projects for the most common types of research.

#### Stats iQ™

Makes sophisticated advanced statistical analysis – from correlations and regressions to cluster analysis and crosstabs – accessible through machine learning and AI.

#### Text iQ™

Uncovers insights hidden deep in open text.

#### Conjoint analysis

Scientifically identifies user preferences to help you develop optimum package combinations.

## Why Qualtrics

### SCALE YOUR TEAM AND EXPERTISE – ALL WITHIN A FLEXIBLE ENGAGEMENT MODEL

Through Qualtrics Research Services you have access to more than 130 research experts, XM scientists, and project managers, who can help you with design, respondent sourcing, analytics, reporting – and anything in between. Regardless of what stage in the resource process you're in, we're here to help you with the right level of support, when you need it.

- + Add bandwidth when your team is juggling multiple projects or under crunch time.
- + Augment expertise for help managing complex studies or leveraging our advanced analytics offerings.
- + Increase reach by working with our research managers, partners, and comprehensive network of panel providers worldwide, making it easy to conduct research in any market, anywhere.
- + Take advantage of the entire Qualtrics technology platform, including advanced features and analytics, by leaning on our platform experts for study design and execution.

With Qualtrics as your partner, you can turn your insights team into a more powerful and better resource for your organization. Because when you're faster and more agile, you can confidently keep up with the pace of change and extract valuable insights from your data – in times of major disruption and when it's business as usual.

**WANT TO SEE HOW IT ALL WORKS?**

Prefer to chat? Contact [sales@qualtrics.com](mailto:sales@qualtrics.com)  
for more information on how to get started.