

Using Your Qualitative Skills to Drive Great Proposals!

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In a perfect world, clients would deliver a detailed Request for Proposal (RFP) before asking us qualitative research consultants to bid on a project. Well, unfortunately, it's just that... only in a perfect world. In reality, RFPs are usually delivered via telephone, and they're usually not detailed enough.

First, let's define RFP. A document written by the client (or agency), an RFP provides project details for the purpose of seeking proposals from potential suppliers. RFPs are common in many fields, not just marketing research. However, this article will deal only with RFPs for in-facility qualitative marketing research. Nonetheless, the following discussion will serve as an excellent starting point for gathering key information for drafting proposals for other types of qualitative research, such as ethnography and observational research.



As mentioned, the purpose of an RFP is to provide clear information about the client's needs and project details. Without this information, bids will not and cannot be accurate. Think of the RFP as a blueprint to guide the proposal process for both the client and QRC. In order for QRCs to craft the best study design and determine requisite pricing, we must have a firm understanding of the study objectives and key project specifications.

Since that perfect world of detailed RFPs rarely exists, QRCs should take the time necessary to ask the right questions about study objectives and design parameters. Below is a fairly exhaustive discussion guide for QRCs to gather the information necessary to draft a great proposal. Note that not every question will be necessary for every project. You'll want to tailor these lines of questioning for each client and project. So, guide your RFP discussions as you see best, just like you do in the interview room!

<i>Project Overview</i>		
Background	Provides a snapshot profile of the company and/or brand	<ul style="list-style-type: none"> • Can you tell me a little about your company?
Brief Project Description	Describes the desired methodology	<ul style="list-style-type: none"> • What are your initial thoughts about a qualitative methodology? Probe for traditional focus groups, mini-focus groups, in-depth interviews, dyad or triad. • Do you envision the interviews lasting two hours?
Research Purpose/ Study Objectives	Spells out in-going assumptions and project objectives	<ul style="list-style-type: none"> • What are you trying to learn with this research? • Do you have any in-going assumptions about this brand? The target audience? The materials to be tested? • Who will use these data? • What types of decisions are you trying to make based upon this new learning?
Budget	Outlines key budgetary issues	<ul style="list-style-type: none"> • What budget has been established for this project? • If none, do you have a range in mind? Probe for minimum and maximum budget guidelines.
<i>Study Specifications</i>		
Respondent Profile	Provides detailed information about who to recruit	<ul style="list-style-type: none"> • Who is your target audience? Probe for demographics (e.g., age, gender, income, ethnicity, education level). • Are there specific behaviors these people exhibit? Probe for psychographic characteristics (e.g., feel it's important to give to worthwhile charities), lifestyle cues (e.g., exercise regularly) and/or purchase behavior (e.g., purchase the test brand most often).
Number of Groups & Number of Respondents	Details how many groups will be conducted, as well as how many respondents	<ul style="list-style-type: none"> • How many groups do you want to field? • If a traditional or mini-focus group, how many respondents would you like to seat per group?
Segmentation	Outlines the segmentation scheme	<ul style="list-style-type: none"> • Which variables do you feel will cause the biggest rift in attitudes within your target audience (e.g., gender, income, brand purchase), so that we can interview these types of respondents in separate groups?
Geography	Information regarding the markets in which the research will be conducted	<ul style="list-style-type: none"> • In how many markets will we be conducting this research? • Do you have specific cities in mind? • If not, I'd be happy to help you select the best markets for testing. Do you have any data that suggests which markets are of average-to-above-average development for your category and/or brand? • Does your target audience tend to be more urban or more sub-urban?
Discussion Guide	Reviews pre-conceived notions about lines of questioning to be included in the discussion guide	<ul style="list-style-type: none"> • Have you already formed any lines of questioning that you'd like answered?
Materials to Test	Details what parts of the marketing mix will be studied	<ul style="list-style-type: none"> • Will you be testing any concepts or collateral? • If so, please describe. Probe for positioning, product, packaging, advertisements, etc. Probe for format (e.g., black and white, color mock-ups, functioning packaging). • How many comps? • Who will be developing these pieces?
AV Needs	Identifies info. regarding equip. needs, if applicable	<ul style="list-style-type: none"> • Is any equipment such as a TV/VCR or wireless broadband connection needed in the interview room?

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<i>Study Specifications, Continued</i>		
Projective Techniques	Discusses the inclusion of projectives, if applicable	<ul style="list-style-type: none"> Based on what you've told me about your category, target audience and objectives, it might be worthwhile if we include a product sort or similar exercise. Are you open to my employing these types of advanced moderating techniques?
Homework	Discusses the inclusion of homework, if applicable	<ul style="list-style-type: none"> Based on what you've told me about your category, target audience and objectives, a homework assignment (such as asking respondents to bring in a bottle of their favorite shampoo) would provide us additional insights. Are you agreeable to my employing these types of advanced qualitative research techniques?
Scheduling	Lists key deadlines and milestones	<ul style="list-style-type: none"> What is your timing for this study? Do you have any specific days already in mind? Are there other milestones I need to be aware of, such as advertising placements deadlines or key internal meetings? Do you want to stagger the cities/dates, or would you prefer to field the groups back-to-back?
Delivery and Reporting Requirements	Provides information about what deliverables are expected	<ul style="list-style-type: none"> What type of reporting do you prefer? Probe for debrief, topline and/or full report. Would you like me to order FocusVision or ActiveGroup? Would you like transcripts of the discussion? Probe for translation, if relevant. Does this study require a camera operator, or is static video sufficient? Discuss expected timing for these key deliverables.
<i>Administrative & Logistical Issues</i>		
Key Contacts	Lists all personnel actively involved in project	<ul style="list-style-type: none"> Will you be my primary contact for this proposal? And the project? What is your full contact information? Are others involved in the decision-making process? Probe for brand management and agency involvement.
Number of Attendees	Helps estimate client food costs	<ul style="list-style-type: none"> Who from your company will be attending this research? Which cities? Which days? Will there be any representatives from your agency joining us?
Project Expectations	Outlines client expectations for project	<ul style="list-style-type: none"> Once the study begins, how involved would you like to be with the details? Probe for frequency of recruiting updates, etc. What role, if any, do you see the agency playing in the planning and implementation of this study? How will the success of this project be determined? What constitutes a successful project?
<i>Qualifications & Proposal Process</i>		
Moderator Qualifications	Provides information on moderator skills necessary for a successful study	<ul style="list-style-type: none"> Does this project require special moderator skills? Probe for experience in positioning research, new product evaluation, advertising testing, etc. Probe for multi-lingual and simultaneous translation, if relevant. Is more than one moderator needed? Is specific category knowledge needed? Probe for package goods, technology, medical/pharmaceuticals, automotive, etc. Would it be beneficial if the moderator has considerable experience with your target audience (e.g., consumers, business-to-business, low-income respondents, senior citizens)?
QRC Selection	Details the process the client will follow to award the project	<ul style="list-style-type: none"> What criteria will be used to select a qualitative research consultant for this project? Probe for lowest bid. Would it be helpful for you and your team if I include additional information about myself in an addendum to the proposal (e.g., biography, case studies, references)?
Proposal Bidding Process	Details the competitive nature of bidding for this project	<ul style="list-style-type: none"> Is this project being bid out to others? If so, can you tell me how many? Can you tell me anything about the other qualitative researchers you're considering? Probe for internal moderator, in-house agency moderator, independents, smaller/ larger marketing research firms, etc.
Proposal Requirements	Lists administrative requirements for the proposal submission	<ul style="list-style-type: none"> Is it okay if I get this proposal to you in ___ days? Do you require a standardized format? If so, would you please provide me your specifications? Do the fees and costs need to be itemized? Customarily, I pay the third-party vendors. Is that how you'd like to proceed on this study? I generally request a 60/40 payment schedule with 60% advance payment and 40% upon project completion. Are you agreeable to these terms?