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TRACKER TRANSFORMATION

MANAGING CHANGE IN TRACKERS AND NORMED STUDIES

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PREFACE

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Our world of constant on-the-go connectedness has changed the way consumers participate in survey research.

If we define survey research, rightly so, as "studies which (still) require participants to remain immobile in front of a computer and focused for long periods of time while they undergo an exercise that hasn't fundamentally changed its form since the turn of the century when questionnaires were written on multiple sheets of paper," the research industry has given an extraordinarily poor showing of itself. We are, after all, an industry that prides itself on knowing how people feel and act! We've let down our clients, who are being driven by these very respondents to existential change, and we've let down the respondents themselves, who are indisputably voting with their feet to do something else with their valuable time.

But wait, you say. As an industry we have been signaling this for several years. Everyone knows we need to change. We've been telling people to move to mobile, to shorten their studies. We've shown them research on research. If only the {sample suppliers, panel suppliers, end clients, client service people} would get their acts together, we'd be fine.

Setting aside the unhelpful finger-pointing (and the visible hypocrisy of many of these companies who continue to allow abusive and biased studies), there is a good deal of truth to this statement.

What suppliers have done well is to tell clients what their new research projects should look like. What they haven't done, though, is help their clients successfully manage the transition.

Suppliers have been doing their darnedest to lead the horse to water, but they can't make it drink. There is a veritable mountain of data, analysis, and guidance calling for change and specifically prescribing the shape of the new world. Yet the core of the industry's business—that which provides evergreen revenue streams for suppliers and sensitive KPI for clients—is still foundering. The changes we are seeing in markets, media consumption, behavior, and survey participation are now creating big headaches for tracking brand awareness, market share, competitive positioning, advertising effectiveness, satisfaction, and many other indicators that companies use to evaluate performance over time.

What suppliers have done well is to tell clients what their new research projects should look like. What they haven't done, though, is help their clients successfully manage the transition.

This isn't easy work, nor is it a common skillset. There are very few people in the industry who have personally managed a change of this magnitude.

Trackers and normed studies typically have at least six figures worth of corporate decisions riding on them. Bigger ones can have an impact two or three orders of magnitude greater. Then there are the personal implications in terms of performance assessments and thus reputation and remuneration. There's a lot at stake. Hence this e-book.

Changing trackers and normed studies is challenging. There's no doubt about it. But it is very do-able with the right preparation and plan. This e-book is designed specifically for corporate researchers and consultants who are tackling these challenges to ensure their brands continue to measure their markets and their performance accurately.

Chapter 1 digs into the seismic changes in consumer behavior that, in addition to disrupting global markets, have created such turbulence for tracking studies. This chapter also confronts the major organizational obstacles that are preventing research buyers and suppliers from embracing change.

Chapter 2 serves up a proven project management framework and steps to follow to ensure success. Change is possible, but it requires a plan that is pursued with diligence and care. Steady hands and transparent routine communication can win the day.

Chapter 3 speaks to the methodology issues one must confront when contemplating change for studies where being consistently wrong is sometimes preferable to being right. This chapter explores the questionnaire and sampling issues arising from the mounting evidence indicating that, despite consistent fielding practices, trackers are going off the rails due to changing respondent behavior.

Chapter 4 offers advice for research buyers on preparing their organizations for change. As unsexy as tracking and normed studies are, the prospect of changing them raises anxiety levels and sets off alarms all over the organizational chart. Without empathy and constant attention, all will be lost. Managing the optics is a necessary—and very difficult—condition for success.

Chapter 5 addresses a variety of topics that don't quite fit elsewhere. These are the big "but what about …?" questions that clients continue to ask, to which suppliers have remained largely silent. The book concludes with a wrap-up and some thoughts on the future of tracking studies and how they fit in the constellation of insights.

One final note: throughout this book we use the word "tracker" or "tracking study" as a shortcut for all manner of studies which, through unchanged design and consistent execution, ensure comparability against previous periods or norms over time. Put differently, if the prospect of a trend break or shifting norms makes you nervous, this book is for you. Thanks for reading.

CHAPTER 1: HOW DID WE GET HERE?

For more information, the Pew Research Institute has done an excellent job chronicling this change. Their reports are free and worth reading. Visit their site at **pewinternet.org**

The consumer insights industry is facing a crisis the likes of which it hasn't seen since it moved online. Massive smartphone adoption, better internet speeds, faster and more competent devices that have become an extension of ourselves, and constant connectedness to media and social networks have changed not only how people participate in research studies, but how they participate in the global economy as well. Younger, connected audiences have migrated en masse to their smartphones. Even 30-45 year olds now index extraordinarily high on mobile usage relative to desktops.

This poses a real problem for brands and retailers trying to understand how markets are changing. For years they have run very carefully-managed surveys to monitor brand awareness, market share, competitive positioning, satisfaction, and advertising effectiveness. State-of-the-art when they were created years ago, these studies are now universally crumbling. Some have completely fallen over dead. Everyone—the industry and its clients—has been aware of this decline for some time now, but for various reasons nobody's reacted, creating a vicious circle of dwindling participation and increasingly suspect data.

Why, though? How did we get here? Why is this disproportionately affecting tracking and normed studies?

The Trick with Tracking

As the name implies, tracking studies (or "trackers") are used to monitor a company's performance over time. Companies use them to determine market share, understand brand awareness and competitive position, and evaluate advertising effectiveness and satisfaction. The point of reference can be at any level, from an individual company, to an entire industry or sector, from specific geographic markets or demographic groups, to entire populations.

The essential strength of a tracker is that it is run consistently, with **the same core questions** asked of **the same people** at **the same intervals**. Consistency is nonnegotiable: even the smallest, seemingly inconsequential change can cause people to answer questions differently and create a break in the trend. When that happens, you are at sea without a compass or landmark: *Is that decline in market share due to a bad advertising campaign? A new competitor? Or is it because this month the question was asked in a slightly different way?* You won't know; your point of reference is past the horizon.

Because of their consistency, trackers are useful for gauging a company's own performance as well as that of its competition on an "apples to apples" basis. Trackers thus reflect the performance of the people accountable for doing this work. The CMO's performance will often be tied to market share. Regional managers will have sales goals in their territories. Advertising teams and their agencies will live or die on effectiveness measures, and so on.

With the objective data trackers provide, companies plan, execute, measure, and repeat. Over time, trackers become the accepted "truth" around which organizations are structured, power is held, stories of performance are rationalized, and crucially, how bonuses and pay raises are allotted. Problems arise, therefore, when markets start to change in big, meaningful ways. The very things that make trackers so reliable and important inhibit their evolution and eventually become powerful barriers to change. For this reason, they are highly politicized and attract a lot of management attention, despite being the least sexy studies a company might do. Changing them, will naturally be difficult.

The Case for Change

The case for changing trackers revolves around four questions:

- Are we (still) measuring the right thing?
- Are we (still) talking to the right people?
- Are the tools and techniques we are using (still) fit for purpose?
- Are we (still) managing the studies efficiently?

Are we measuring the right thing?

While the world is changing in unprecedented ways, companies still need to understand market share, brand awareness, competitive positioning, and advertising effectiveness. These metrics still matter!

What's becoming out of date, even obsolete in some cases, is how trackers measure the drivers of these metrics. Nobody would challenge the fact that media consumption has changed dramatically. Yet many of these same people aren't able to accommodate different devices when they test copy. Similarly, anyone with even a passing interest in the subject would agree that shopping behavior, particularly pre-purchase, is utterly different today than even five years ago. Yet there are plenty of studies which, by virtue of the questions they ask, imagine the customer journey as a simple linear process and ignore the many new ways in which people learn about unknown products.

THINK ABOUT IT

Does your tracker or normed study accurately reflect the way in which people use, purchase, or interact with your brand? If you are unsure, find a way to speak to the people on the front line.

Are we talking to the right people?

Do you work in an industry where you can afford to ignore people who now experience the Internet predominantly through their smartphones? Your answer to this will almost certainly be "no". Few industries and markets haven't been affected by the digital mobile revolution. But if you've answered "no" and your tracker isn't smartphone compatible, you're basically in the dark when it comes to understanding not just millennials, but even those in their thirties and forties who represent a sizable chunk of most markets.

The industry uses two terms when it talks about adapting surveys to smartphones. One is "mobile first", which speaks to designing surveys for the smartphone as the base case. There is a vast amount of high quality research on survey participation by device that illustrates, among other things, that the amount of attention respondents are prepared to pay is far less on phones than on desktop devices. The reasons have as much to do with respondents being on the go as they do the dull research experience.

THINK ABOUT IT

Does your tracker or normed study work on tablets or smartphones natively, with no annoying pinching or scrolling? How long is it? Can people complete part of it, go away for a few minutes, and pick up where they left off?

Are you chronically short of people under 35, or are you otherwise forcing this natively mobile subpopulation to sit down in front of a big screen and thus missing out on the increasing numbers whose personal browsing occurs exclusively on a phone?

Do you ever look at the data and wonder why you're not seeing an expected market change? Or why the data are showing increased volatility despite consistent fielding practices?

The other term used is "device agnostic", which means that a study should work on any device. There is still a vast inventory of trackers that aren't either of these, which has created a death spiral of declining participation and respondent shortages for trackers. These studies are no longer representing markets accurately and they're really damaging panels.

Are our methods and techniques fit for purpose?

We say a survey is fit for purpose if it produces data that are relevant and reliable for making decisions. Operationally, this translates into having data that are sufficiently granular and measured frequently enough to be useful. It also refers to whether we're asking people questions they can answer accurately. These days, however, many wonder whether surveys are still the best way to find answers.

There has been an explosion of interest in innovative technologies and the exciting new data sources they produce. Big data, social media, neuroscience, virtual reality… they are causing companies to ask two interrelated questions:

- How can my brand benefit from these new techniques?
- How much of my research budget should I be spending on new techniques?

THINK ABOUT IT

What data is your study collecting?
Might there be opportunities to find this data elsewhere?

Like the incumbent in a political campaign, perhaps a respected elder statesman, survey research is forced to defend its record. It hasn't necessarily done anything wrong. Rather the challenger is evoking new and attractive ideas that make the incumbent look a bit long in the tooth.

In some cases, new data sources are overtaking traditional surveys. Passive data, for example, does a much better job of recording where a person has been online, than his or her memory. But big data techniques aren't necessarily representative. Like any method, these new techniques have their advantages and disadvantages.

There are, without a doubt, plenty of reasons to still say "yes" to surveys. But companies should be asking themselves what data they need to get from surveys and with what frequency these metrics need to be measured to get value. There may be opportunities to reduce collection and use the savings to explore new techniques.

Are we managing these studies efficiently?

Sample pulled by human operators, data coded by human analysts, tables programmed by human processors, PowerPoint templates updated by hand; these are the practices that have characterized the market research industry for decades. Research suppliers have built large operational departments (with equally sizeable costs) to perform these functions that are now obsolete. The entire production process can be fully automated.

Intrinsically, efficiency is not typically a reason for changing trackers unless the benefits become too big to ignore. Yet, this is exactly what is happening. Clients are finding that suitably granular tracking studies can be done with **samples that are more representative**, yield data of **equal, if not better, quality,** be fielded in a **fraction of the time,** and **save at least 25%** (in most cases, far more) by eliminating costly human operations. These savings can be taken to the bottom line, or, as many are doing, be redirected toward new methodologies. This is all great

THINK ABOUT IT

How much is your program costing you? Are you trying to find meaningful cost savings to reallocate your budget? How flexible has your provider been? Have you tried to gather information on what your program might cost elsewhere?

news for the buyer. The challenge, however, likes with the supplying firm, which, due to its legacy structure, will almost certainly be unable to make the economics work and will resort to scaremongering tactics. Research buyers are thus put in a terrible bind: to achieve these savings, they will need to switch providers, which would likely mean a break in trend.

Conclusion

There are two inescapable conclusions about tracking studies. One is that many (most) need to change as they are no longer providing relevant information about customers, the competition, and company performance. The other is that many of them haven't changed because the organizational costs of change are high for both buyers and suppliers.

A surprising number of tracker owners have convinced themselves that change can be put off for another year. This is a well-publicized fiction. Research participation, and thus the data from respondents, has been changing significantly for at least two years and the entire industry knows it. Your tracker is already being affected and you need to do something about it. The aim of this book is to help you understand how to manage this change thoughtfully and carefully. The alternative is undesirable.

We'll explain how to do this in the following chapters which we're releasing over the coming few weeks. Stay tuned for the next chapter: "The Project Plan".

CHAPTER 2: THE PROJECT PLAN

In chapter 2, we'll discuss concretely what your project should look like by sharing a simple planning template. There are three things to retain from this chapter. One is the importance of transparent, understandable plans with names, dates, and indicators of success. The others are the discipline and communication that ensure you keep the project and participants moving along the path to success.

Project Kickoff: Steering committee and high-level plan of attack

The kickoff is an essential first public step in the process. When handled properly, it will build critical initial belief. It is thus essential to come to the kickoff meeting very well prepared to discuss the following points.

Reasons for change. These should be simple, few in number, and logical given your business context. Be able to explain the underlying issues and causes fluently. Do this by having quiet conversations with colleagues a few weeks in advance of the meeting. The more you familiarize yourself with people's points of view, the more time you will have to synthesize your arguments and the better prepared you will be.

Project phasing and timing. This is about big milestones for the substantive work. This will invariably have five phases: investigation, design, testing, analysis, and implementation. The following section of this chapter talks about this. Use that discussion to estimate a high-level timeline. Six months (including any parallel testing) is a manageable

timeframe provided the project team is disciplined. Too much longer may lead to fatigue, lack of interest, and fatal loss of momentum. Quicker is possible, too, although this implies less time for at least one (if not all) of the essential phases of the project.

Participation. You will need to be inclusive, but being too inclusive will make it difficult to ensure progress. As discussed in chapter 4, if you find yourself with too many people, consider splitting into two groups: a steering committee, that meets frequently, and a larger group of individuals who can be periodically but less frequently informed.

Status updates and communication. There is no such thing as overcommunication in a tracker change project. Set recurring status meetings from the start. These will be important to maintain momentum, and create both the perception and reality of progress and inclusion. These meetings will also become the forum for resolving any critical issues and gaining complete alignment. Notes must be taken and distributed. Note that a status meeting is different from a work session, which should be held separately.

Be very buttoned up at your kickoff meeting, even if your department or company tends to be less formal. When your preparation is done, schedule the meeting with enough time to ensure a full discussion. Build in time boxes to discuss the different components. Allow for discussion, but don't allow people to dominate or derail the group. The worst possible outcome is that your kickoff becomes a forum for opinions of varying quality and constructiveness. Nothing will sink the ship faster than careless talk, with zero structure or substance behind it.

FIVE PHASES TO TRACKER TRANSFORMATION

1: Investigation

2: Design

3: Testing

4: Analysis

5: Implementation

Phase 1: Investigation

The Investigation phase serves to collect as much information as possible on:

- **Who** is using the data
- **Which** data are being used
- How **frequently** the data are being used
- For what **business purposes** the data are being used, down to the **reports in which these data points appear**, and the **KPIs being tracked**
- What **"problems"** people perceive with the existing tracker, (methodological, economic, or business-related)
- What **improvements** people are looking for, either from the tracker or from some different collection method
- The **post-data collection processes** (operational handling, database extracts and transformations, methodology or weighting) that are applied to turn the tracker data into reports. Study these carefully, as there are almost always skeletons in the closet.

There are **two milestone deliverables** of this phase. First, you will create a comprehensive list of the *possible, but not guaranteed, changes* which will ultimately determine the scope of the project, and which KPIs are likely to be impacted. This list should include the *whys* and *whats*, with names and titles of people interviewed. Second, you will issue a high-level project plan with names and approximate dates to start to create structure and urgency around the project.

Given the above goals, the investigation phase is where you will, and should, have the greatest participation. Depending on the number of people, this phase may take up to two months.

Your **measure of success** for this phase will be the steering committee's agreement that the investigation was open, inclusive, and thorough. Don't assume you have their agreement. Ask people to vocally affirm that they agree the investigation was open, inclusive, and thorough.

Phase 2: Design

The design phase is where people's problems and wishes are transformed into a new research design. The discussion in Chapter 3 around methodology considerations will help frame this phase. While the range of possibilities makes it difficult to contemplate all the questions you should ask, they will generally revolve around the following three points:

ESSENTIAL QUESTIONS DURING THE DESIGN PHASE

1: Are we capturing the market/behavior effectively?

2: Do we need to adapt to become mobile-friendly?

3: Do we want to reduce cost or increase speed?

- **Are we capturing the market or behavior of interest effectively?** If not, is this a problem with the questionnaire or the sample? How permanent are these changes, and can you possibly anticipate where the market may go next to be prepared?
- **Do we need to adapt our study to be device agnostic and mobile friendly?** If so, how might you minimize questionnaire length without disturbing the overall question structure and increasing the probability of breaking trends?
- **Do we want to reduce cost or increase speed?** If so, what concessions are your stakeholders willing to make? Can you do it by reducing sample, decreasing the study's field frequency, or shortening the questionnaire? Do people understand the implications of reducing the resolution of the data?

The design phase is also the first place where the logistics come into play. You will need cost and timing estimates for the new design that include a full parallel test (which we'll discuss further in Chapter 3). Use these estimates to refine your design and your project plan.

You will have **several milestone deliverables** in this phase:

1. The new questionnaire and/or sample design.
2. The list of problems and requests from the investigation phase showing which are addressed in the new design, which are not, and why in either case.
3. The new implications for costs and timing once the new design is implemented, and for the duration of the project.

Depending on the extent of the changes, this phase may also take up to two months.

Your **measure of success** for this phase will be both the steering committee's and the larger body's agreement that the design is acceptable. To this end, you will need to socialize these changes broadly to ensure you have everyone's attention and assent. Again, don't assume you have agreement. Require them to say "Yes, I am fine with this."

Phase 3: Testing

The testing phase is where the new design is put rigorously through its paces. Chapter 3 explains what this entails in greater detail, but for this phase you will need to define, in detail, the following test specifications, then execute the test.

- The Think Aloud Pre-Test
- The experimental design, which will include the specific questionnaire and sample being used as the control vs. test
- The fielding plan for the experiment

IMPORTANT!

Take the time and test carefully. Even the most seemingly insignificant edits can create big changes.

There are **two milestone deliverables** for this phase. First you will produce a **comprehensive test plan** with names and dates that has been reviewed by a research methodologist. Second, following the execution of the test, you will **review and affirm** that the test was conducted according to plan and run a bad test.

The test phase is the only real phase whose duration may vary considerably, as it may depend on the length of your usual field period and how much time you feel is necessary to get a read on the data. Some run in parallel for only a week. Some run for a quarter. Some can run for longer. You will need to balance the duration of the test with the obvious hard and soft costs related to sample and project momentum.

Your **measure of success** for this phase is the execution of the test as planned. It is critical not to compromise at this step. All the careful preparation you have done previously may be for naught if you deviate from the plan.

Phase 4: Analysis

The analysis phase, also discussed in chapter 3, is where you will line up the control data with the test data, and compare each data point side-by-side looking for significant differences. Reproduce the KPIs and metrics that appear in any reporting. Do this for raw and weighted data, if applicable. Have data consumers use the test data in ways they might normally do in the course of their everyday work. This will mean enlisting technical teams to facilitate the production of reports.

Then, schedule sessions (multiple sessions will almost surely be needed) with stakeholders to discuss and develop explanations for any changes in the data. Be maximally inclusive and don't rush this phase. The socialization process is critical for establishing the new truth and, with it, the belief that the new data are as good or better than the old data.

> Analyze the new data completely, side-by-side with the old, using your typical reports. This does two things. First, it ensures the new data are coded and processed correctly. Second, it's the only way you can thoroughly evaluate the new data for potential changes.

Your **milestone deliverables** for this phase are a **complete impact analysis report** that shows, side-by-side, the data from the control and the test, as well as **new reports with critical KPIs** and the **agreed-upon list of fixes/changes.**

If the data are significantly different, you will be obliged to decide what to do about the difference. Chapter 3 expands on how to address this. Fundamentally though, you will need to decide to either live with the change or make some sort of adjustment. **If you decide to alter the data, then the details of how the data will be altered must be specified as another milestone deliverable for this phase.**

Your **measure of success** for this phase is the agreement of the broad audience that the changes that have been made are acceptable and can be implemented. As with the other phases, have people affirm vocally (or in writing) that they accept the change. Congratulations! You're almost finished!

Phase 5: Implementation

The implementation phase is where the redesigned tracker goes live and becomes the new "data of record." The activity here, in principle, is nothing more than the continued execution of the process that was designed for the test. That said, it is not always feasible to run tests that precisely mimic a live production environment. Should this be the case, you will need to systematically retest the process from start to finish—including all output—to ensure it is functioning properly.

Your milestone deliverable for this phase will also be your measure of success, namely the on-time and correct fielding of the new tracker. Call an official meeting following the dissemination of the first wave of new data to have people vocally affirm that they accept the results.

Celebrate when you're done!
You've earned it!

Then take a victory lap with the extended group of stakeholders in the form of a celebratory meeting where you thank them for their participation!

Good project management techniques

For each phase of the project, your project manager should use techniques that promote the perception and improve the likelihood that things are under control. There is no magic here. Below are the visible manifestations of best practices.

- **Hold regular meetings, booked in advance.** They should be long and frequent enough for status reports, but not too long or frequent that they feel burdensome.
- **Come prepared.** Always come to the meeting with an agenda of topics to discuss and any decisions to make. If there is little to discuss, have the meeting anyway. People tend to communicate when they are brought together, even if they say they have nothing to talk about. Have them come, review where you are, ask if they have questions, and let them out early if there's nothing else to discuss.

Effective project management means being transparent, prepared and disciplined. Communication is essential at every step of the process.

- **Always ask multiple times if people have questions.** People need to feel heard, and the project manager needs to demonstrate this commitment to listening.
- **Issue meeting notes and the latest iteration of the project plan (with names and dates) promptly.** Send out documentation after each meeting that includes a record of the issues discussed and especially any decisions taken.
- **Create contingency plans.** In cases where there is uncertainty about outcomes, identify probable scenarios and create contingency plans to address them.

- **Communicate regularly.** Weekly communication is essential, whether there has been a meeting or not, if only to inform people where you are in the process and that things are on track. Communicate more frequently during intense periods. Be objective and transparent. Remember, there is no such thing as overcommunication during a tracker change.
- Don't tolerate bad behavior. Keep people on track. If they aren't participating or aren't being constructive, address the issues.

Conclusion

While the devil is always in the details, a tracker change always follows a straightforward project plan. The plan serves more than just the obvious purpose of structuring activity. It provides a roadmap with intersections of participation. It gives people visibility into a difficult process, helps them understand where you've been and where you're going, and in doing so promotes confidence in that process.

A good project manager is equally important. This person becomes the source of authority and progress, the maintainer of momentum and communication, and occasionally the cat herder who arbitrates tough decisions. We'll speak more about this in chapter 4.

CHECKLIST

PHASE	INFORMATION NEEDED	MILESTONE DELIVERABLES	SUCCESS MEASURES
1: INVESTIGATION 1-2 months	• Who is using the data • Which data are being used • How frequently the data are being used • For what business purposes the data are being used (find reports & KPIs) • Problems with the existing tracker (methodological, economic, or business-related) • What improvements people are looking for • Post-data collection processes (operational handling, database extracts and transformations, methodology or weighting	**1.** A comprehensive list of the possible, but not guaranteed, changes and KPIs impacted **2.** A high-level project plan with names and approximate dates	Steering committee's agreement that the investigation was open, inclusive, and thorough
2: DESIGN 1-2 months	• Understanding of whether market or behavior of interest is being captured effectively, why or why not • Whether study needs to become device agnostic and mobile friendly, and consequences • Whether there's a need to reduce cost or increase speed, and consequences	**1.** The new questionnaire and/or sample design **2.** The list of problems and requests from the investigation phase showing which are addressed in the new design, which are not, and why in either case **3.** The new implications for costs and timing once the new design is implemented, and for the duration of the project	Steering committee's and the larger body's agreement that the design is acceptable
3: TESTING 1-2 months	• The Think Aloud Pre-Test • The experimental design, which will include the specific questionnaire and sample being used as the control vs. test • The fielding plan for the experiment	**1.** A comprehensive test plan with names and dates that has been reviewed by a research methodologist **2.** Following the test, review and affirm that the test was conducted according to plan	Affirmation that the test was conducted according to plan
4: ANALYSIS 1-2 months	FULL IMPACT ANALYSIS • Line up the control data with the test data and compare each data point side-by-side looking for significant differences • Reproduce the KPIs and metrics that appear in any reporting • Have data consumers use the test data in ways they might normally do in the course of their everyday work	**1.** A complete impact analysis report that shows, side-by-side, the data from the control and the test as well as new reports with critical KPIs and the agreed-upon list of fixes/changes **2.** Meetings with all stakeholders to review the data	Agreement of the broad audience that the changes that have been made are acceptable and can be implemented
5: IMPLEMENTATION 1 month	Implementation of the new process/questionnaire/sample in a production environment. (If this is not the same as the test setup, the process and outputs must be re-verified)	On-time and correct fielding of the new study	Confirmation that the new study fielding was done correctly and on time

CHAPTER 3: MANAGING THE METHODOLOGY

In chapter 1, we discussed the undercurrents of changing consumer behavior that are threatening trackers and normed studies. In chapter 2, we set out a proven project management framework for structuring work, setting expectations, defining success measures, and — perhaps most importantly — providing critical visibility about what's going on. In this chapter, we'll discuss the important research issues to consider.

How likely is it that my data will change?

We will ask this question from a political point of view in chapter 4, but for now let's consider it from a research perspective.

There are two ways to think about this question. One is that any change, as small or insignificant as it may seem, should be expected to change the data. We can hope otherwise, but it's not a recognized component of a solid research methodology. People should thus be prepared for change, and the extent to which you prepare them for it is essential to successfully navigating the transition (more on this in chapter 4).

From a research point of view, though, the question of degree isn't terribly important. If we assume that there is a high likelihood of change, it's far more important to understand *what* has changed and *why* it is changing.

THREE FACTORS THAT CAN CAUSE NORMS TO SHIFT:

1. Changes in questionnaire format
2. Changes in sample composition
3. Changes in questionnaire content

Recall that, in chapter 1, we made the case that change is already afoot and appearing in your data. Thus any conversation about change from a research point of view needs to consider the existing data as having its their own flaws or weaknesses. Keep these in mind as you consider the points below.

There are three large factors that will potentially create a trend break or cause norms to shift.

1: Changes to the questionnaire format

If your tracker is being adapted to smaller screens, it is very likely that the format of your questions or responses, i.e. how they are displayed on the screen, will need to be adjusted to fit smaller screens. Touch screens especially create new ways for respondents to physically interact with a study.

For simple questionnaires with single- or multi-punch responses, the odds of a major data change should be small. The typical radio buttons or check boxes we see in online questionnaires are completely analogous for small screens. More complex questionnaires will naturally incur greater risk. The grid question should be first on the firing line as it has indisputably proven to be poorly understood by respondents despite its large-screen efficiency. Likewise, changes to scale questions, particularly the use of sliders (which often enable the respondent to provide more finely-grained responses, and thus change the variance of responses) or the inversion of horizontally-arrayed scales to vertically-arrayed ones, may cause shifts in data.

There are two things to take away from any changes in format. One is that you do not need to become an expert. Any decent provider will have a point of view on how to format and display different question types regardless of screen size. Survey research platforms have this

built into their logic. The other is that you shouldn't go into the redesign process from a point of view of risk-aversion to proven techniques. The best course of action is to do a parallel test to determine whether the data will change. We discuss the parallel test in detail below.

2: Changes to the sample composition

There are three ways sample composition can change in a tracker. From least to most consequential, these are (1) changing demographic composition, (2) changing sources, and (3) changing the sampling frame.

Changing a sample's demographic composition - that is, changing the proportions of different types of men vs. women, young vs. old, etc. - is usually manageable through weighting. Weighting is a recommended practice for any tracker, especially if there are characteristics of a sample which are not easily managed in field that are correlated with outcomes of interest. Weighting is not a panacea, especially if the raw sample composition is very different from the target population, but it is easy to ensure the sample is well-aligned with the desired target beforehand.

It is a poorly-understood fact that the sources from which panel companies recruit respondents can and do change over time. It is thus hardly a guarantee that using the same panel company over time ensures the same composition of respondents in terms of their demographics or data quality.

Changing sample sources entails greater risk. Whether you are using a research panel or some other source of respondents, there are plenty of differences in people's behavior that aren't fully captured by standard demographics like age, gender, or household size. Ordinarily, we would not expect big changes — unless there is something about the panel that is correlated with the subject of the tracker. For example, there are many loyalty communities around mobile gaming that offer members game currency for taking surveys. If you are running a study about mobile phone use, you may see differences in behavior. Nevertheless, it is a poorly-understood fact that the sources from which panel companies recruit respondents can and do change over time. It is thus hardly a guarantee, that using the same panel company over time ensures the same composition of respondents in terms of their demographics or data quality.

The third way a sample can change is if there is something about the execution of the study that implicitly changes its sampling frame. In practical terms, opening a study up to completion on a mobile phone invites a large group of people who have foregone participation on desktops, and thus represents the biggest risk to trackers that decide to go mobile. People who are smartphone dominant especially have different behaviors when it comes to shopping and media consumption than those on desktops. They are also, for most brands and retailers, a very desirable subpopulation to understand.

3: Changes to the questionnaire content

Whether it's to reflect the evolution of the market, or behavior you're studying, or to simply streamline and reduce cost, changes to questionnaire content can have a big impact on the data. These types of changes are frequently underestimated in terms of their impact: a single word can literally change a market.

EVERY QUESTIONNAIRE CAN BE SEPARATED INTO THREE COMPONENTS:

1. The essential questions
2. The interesting-but-not-critical context questions
3. The demographic questions

Most tracking questionnaires can be broken down into three parts. In usual order of appearance, these are:

1. **The essential questions,** meaning those essential for calculating the tracked metric, starting with the qualifying question that usually takes the form: Did you do <activity> during < some time period>? These are usually followed by questions about who did the activity and where it was done.
2. **Interesting but not critical contextual questions**, which describe or provide additional context about the essential activity being tracked, yet aren't essential to the counting. What were you doing beforehand? Who were you with while you were engaging in our behavior of interest?
3. **The demographic questions**, which should at minimum include age, gender, household composition, a geographical measure (urbanization or region), and a measure of purchasing power (income, employment status, etc).

When thinking about changes to the questions themselves, it's best to think about what you're trying to achieve. Ask yourself the following questions:

Do you need to shorten the tracker?

Trackers are like closets. They start out tidy and organized, and over time become messy and overcrowded, piled high with yesterday's fashions and toys that the kids don't play with any more. It's important to clean them out every once in a while. This is especially true if you notice respondents are abandoning in greater rates, participating in lower rates, become mobile-friendly, or if you're trying to reduce costs.

Trackers are like closets. They start out tidy and organized, and over time become messy and overcrowded, piled high with yesterday's fashions and toys that the kids don't play with any more.

Start from the end and work backward. Eliminate as many demographic questions as possible if you have data as part of a respondent profile. Notwithstanding the fact that most sample providers have this data on file, researchers still reflexively ask these questions to the great annoyance of respondents.

Challenge yourself to justify the interesting but not critical questions. Figure out who is using them and why. Are they still relevant? Is someone **using the data** to make decisions? Does the insight they provide change much over time? If not, ask them less frequently. Be careful, though, if these appear before the essential questions, as they can have a conditioning impact on responses.

The last things you should touch are the essential questions, for what should be obvious reasons. That said, there are two cases where this is important: marketplace changes, and respondent understanding.

Do you need to better reflect the market?

While the pace may be different, markets evolve naturally over time. Categories grow and shrink; brands come and go. While we generally seek to avoid change in a tracker, we must accommodate it where there is a real change afoot. For market share, and brand-awareness tracking

especially, lists that describe the structure of a market by brand or category (or any other relevant factor) should be updated with some regularity. Once a quarter is probably sufficient, unless the market is changing more quickly.

Do respondents understand and complete the survey as expected?

At its core, survey research is a challenging endeavor. Depending on the subject matter, it can be difficult to get respondents to understand your question, summon the appropriate response, record that response, and then want to continue on. This is particularly the case when we ask consumers to recall distant, non-remarkable, or even (socially-scorned) behavior. If you believe respondents are failing to do one of these things, then it may make sense to change the questionnaire more substantially. This change requires very careful consideration and is best served by qualitative or non-conscious approaches to create greater understanding.

Sample size or tracker frequency

Sample size and tracker frequency, are important to consider as they speak to the great tradeoff between readability of the data and cost.

Classically-trained researchers know that the smaller the sample, the noisier the data. Trackers are generally built to have sample sizes sufficient to read changes in the smallest area of interest. Yet even with an ideal questionnaire (which is hardly common) and a probability-based sample (which is achievable only at a very high cost), a tracker may exhibit disconcerting levels of volatility.

There are solutions, though. One is to define the lowest 'safe' level of granularity for reporting to restrain the urge to read the data more deeply than their explanatory power will allow. This can be expressed in simple rules like, "Don't look at anything with a brand share below 1%." Another is to experiment with rolling up data over multiple waves, which has the same stabilizing effect as increasing sample size at a lower cost, and may be justified depending on how often people change their behavior.

At some point the users of the data need to made to understand that even the most 'scientifically managed' online study has volatility. We recognize this is easier said than done, but the change process will allow you to re-open this discussion. It may be that a survey isn't the best tool for a particular measurement need. Or, more likely, it will be necessary to revisit and retrain people on how data should and should not be used.

Testing

As mentioned above, the answer to the question "Will the data change?" isn't nearly as important as knowing that, if it does, you'll be able to witness it and provide plausible explanations. Some change may even be desirable. What we want to avoid, though, is the kind of change where people scratch their heads and say "Gee, we never saw that coming."

Think aloud pre-testing

David Bakken, of the Foreseeable Futures Company, and methodology expert, has a valuable technique he calls "think aloud pre-testing." As the term implies, this entails quite literally talking oneself through the tracker, reading each question aloud, and saying out loud, exactly what comes to mind for each and every question. The deliberate and audible nature of the exercise is guaranteed to expose problems of comprehension, flow, and format in ways that silent skimming will never do.

- **Will the layperson understand the question, or does it use unfamiliar jargon or assume industry knowledge?**
- **Will s/he be able to summon an accurate response, or is it something s/he never noticed or forgot?**
- **Will her/his response fit within the choices on the page?**

Think aloud pre-testing entails quite literally talking oneself through the tracker, reading each question aloud, and saying out loud, exactly what comes to mind, for each and every question.

Resist the urge to do this only with internal team members who are likely fluent with the industry, its jargon, and its context. If necessary, draft friends and family for a test run using the always-popular reward of free lunch.

Full parallel testing

A full parallel test is a **must** for any tracker change. It is a rigorous side-by-side experiment that will allow you to validly compare data from the old tracker against the new design. It is the only way to get a thorough understanding of the changes.

A full parallel test typically proceeds in the following manner:

- **Decide on your test questionnaire.** Your control questionnaire will be the existing tracker. The test will be the new version (or versions, if you are contemplating multiple changes) that is as close to final as possible. Be careful if you are planning changes to both the questionnaire and the sample. You should separate these into sequential tests (first test: old vs. new questionnaire; second test: new questionnaire with old sample vs. new questionnaire with new sample) to maximize your ability to understand changes.
- **Pull one big sample, then split it.** Sequential samples carry too much risk when doing full parallel tests, even if the second is pulled immediately after the first. Pull one giant sample, then randomly assign people to the control or test design. Do the statistics beforehand so that you know the margin of error you'll need to exceed to detect significant differences. Don't skimp on this part, even though this is where real dollars (or pounds, euros, or whatever) will be spent.
- **Field the studies exactly the same way.** It's not more complicated than that. Make sure the studies are treated identically in field. Start and stop them at the same time.
- **Process the data exactly the same way.** Tracker changes help expose ghosts in the machine, particularly any aspects of data coding, editing, or weighting that happen after data collection and before reports are generated. Make sure you've understood the current processing steps and faithfully replicate them (or change them in a controlled fashion) for the new study.

In any parallel test, make sure you process the data and produce output just as you would with the live study. This will expose any 'ghosts in the machine.'

- **Produce full output, including field stats.** Examine each and every data field to ensure proper response capture and coding. In the day when humans created import scripts and had to parse the data, this was a major undertaking. These days, with automated systems that instantly and flawlessly parse and display data, it's a lot easier. Likewise, compute and compare the statistics from the field, like raw incidence, completion rates, and length of interview.
- **Do a complete impact analysis.** Line the control data up against the test data, question by question, and look for differences. Use existing reporting templates where possible as this will be most

- people's anchor to truth. Do this step very openly and publicly. Discuss why the differences might have arisen and what that may mean for people using the data. This step is essential to socializing the new 'truth' that you will create with the new tracker design.

What to do if data changes

There are really only two things you can do if the data change. One is to live with the change. The other is to try to adjust the data somewhere to minimize it.

If you and your stakeholders are happy with the changes and can rationalize them in ways that make a sensible new truth, then it makes sense to accept the changes and move forward.

Walking away from trends or norms can be a very difficult thing, though. For this reason, it's not uncommon to see companies try to adjust, either the new data (sometimes called 'backcasting') or the old data (sometimes called backcasting) to bring the two into alignment.

Aligning the data is a very tricky thing to do and never works perfectly for what should be obvious reasons. The whole point of changing a tracker is to amend something that isn't right in the existing data in the first place! The data will never perfectly align. Moreover, the practice of trying to mold the new data to fit the old (which, in our experience, is the most common practice, as it minimizes the collective effort needed to assimilate the new truth) is inherently dangerous. Forcing a system that you've spent time, money, and energy to produce a result that it doesn't produce naturally, means you will need to keep forcing it, wave after wave, to produce an unnatural result. If you have no choice and you need to preserve the trend, the best solution is to refactor the 'old' data to align with the new data. Your parallel test should give you insight as to how to accomplish this.

We reiterate here the importance of socializing the data — of openly, publicly, and frequently discussing and rationalizing what has changed and why. Those who are unfamiliar with consumer research

methodologies are going to have difficulty understanding how there can be two versions of truth. But the more you tell the story, the more everyone (including you!) will internalize and accept it.

Conclusion

While the details of your particular tracker or normed study will vary, this chapter should give you a framework for considering and testing the methodology changes you're contemplating due to broader shifts in consumer behavior. At the end of the day, a good tracker methodology—like any research design—is one that is simple, relevant to the subject matter, thoughtfully planned, and well-executed.

CHAPTER 4: MANAGING STAKEHOLDERS

In many respects, the mechanics of a tracker change are easy. They represent a series of straightforward steps which, if executed thoughtfully, will lead to success. The real difficulty lies in managing the non-research aspects of the change, namely the political and corporate implications. In our experience, these concerns will at some point dominate the discussion. This chapter is devoted to managing optics and crossing the corporate minefield.

Are the data going to change?

We posed this question in the last chapter, where we decided that (at least from a research point of view) this question wasn't as interesting as understanding how and why. For everyone else in the company, however, the research answer to this question will be dissatisfying—not because this answer is invalid, but because it misses the point.

This question is the "elephant in the room" for every discussion about tracker changes. The reason isn't surprising: over the past generation,

companies have come to rely less and less on intuition and conventional wisdom to set strategy and manage operations. In their stead, data have become the currency of knowledge, and the foundation for truth with a capital T, in a company. The heart of the issue, therefore, is that changing a tracker means changing the truth. This is an inherently destabilizing, and even threatening, activity.

How you manage the optics around this change in your organization will go a long way to convincing people the change is a success.

Changing a tracker means changing the truth. This is an inherently destabilizing, and even threatening, activity.

The importance of communication

It is impossible to understate the importance of **regular, transparent, two-way communication** for managing internal stakeholders through a tracker change. Success is simply not possible without it. Beyond being essential for basic project management, this communication will fundamentally and profoundly influence people's perceptions of whether things are on the right track. Even a whiff of secrecy, or of apparent neglect of an "important" issue (whether it's truly important or not) will undermine your campaign. Perception really matters.

Discovery

There are three things you will need to know to begin navigating these difficult waters.

First, you need to understand who is using what data. This will help you identify all stakeholders. The easiest way to do this is to look at the reports people use to illustrate success. The report is the public manifestation of the axiom "What gets measured gets managed." What company KPIs come from the tracker? What operational decisions are being made? Complete your investigation with interviews to round out your knowledge about who is doing what (and how often) with the data.

Second, use the information you've collected above to begin to understand people's sensitivities. It's fair to assume that public reports will be the places people will feel most exposed and thus most vulnerable. Ask leading questions like "What happens if this number changes a lot? Who comes knocking on your door?" to see how the unexpected cascades through the organizational chart.

Third, ask people what they're missing, or what's not working well, and how the data could be improved. If you only talk about change, nobody will see an upside, but this is more than just a rhetorical tactic. If you're going to go through the trouble of changing a tracker, you might as well take the opportunity to create change people will value. Even delivering just some of the change people want goes a long way in creating the feeling of success. It can also provide a longer-term agenda for gaining insight into the business.

When done comprehensively, the above discussions will help you identify stakeholders and their vulnerabilities, what they'll miss and what they want. Beyond being essential for the conduct of your project, this information becomes the basis of your negotiating and communication strategy.

Who participates?

The easy aspect of participation is inviting stakeholders. You should be able to identify these people in your investigation. Be careful about numbers, though: large groups are inherently difficult to corral and manage. If you have to, create a core steering committee that really drives the project and makes decisions, and a larger team for less frequent updates. The core steering committee should be minimally composed of the project manager, the executive sponsor, and at least one member of the important teams or departments most affected (either as users or consumers of the data) by the change.

Large groups are inherently difficult to corral and manage. If you have to, create (1) a core steering committee that really drives the project and makes decisions, and (2) a larger team for less frequent updates.

The hard aspect of participation is the interplay of personalities. In the ideal world, all participants would be rational, calm people who could dispassionately contribute to constructive discussions about change and make expedient logical decisions whose consequences they're prepared to live with. (Who says researchers don't have a sense of humor!)

All sorts of people can impact your project. There is the kind-but-fearful Chicken Little who paralyzes the group with discussion of every detail; the smart-yet-toxic blusterer whose modus operandi is to intimidate; the seemingly agreeable-yet-scheming middle manager, who is quietly stabbing you in the back and sabotaging your project by issuing reports, with just the right level of dubious hearsay to create suspicion; the "indispensable" person who, from benign overwork or

passive-aggressive inattention, becomes an obstacle to progress, or the genuinely decent person who is a good partner but whose bonus hangs in the balance—to name but a few.

Establish formal rules of the game: set expectations about participation, roles, and deadlines for project participants.

The way to deal with these people is twofold. **Formally, you need to establish rules of the game.** Set expectations about how and when people are supposed to participate. Be clear about their roles and deadlines. Faithfully document their adherence to these rules and address bad behavior quickly and effectively, either with the group or with their managers.

Just as importantly, but less formally, and as painful as it might be, genuinely try to get to know them and pay at least some attention to their needs. This may seem like a long way to go, but without genuine empathy you take on significant risks. As many trackers are linked to compensation and power, any changes will quite naturally create high levels of anxiety amongst those whose necks are in the noose. These concerns have to be addressed seriously since they affect people's reputations and livelihoods.

Change can create feelings of loss, apprehension, and even fear. Change replaces confidence with doubt, and faith with uncertainty. Not acknowledging these feelings is the surest recipe for failure. As hard as it can be to overcome emotional obstacles, it is both possible and necessary for success.

The project manager

The above paragraphs hint at it, but let's be perfectly clear — the single most important driver of success will be a capable project manager who possesses the following non-negotiable qualities:

Maturity. Make no mistake: you can plan for things to go smoothly, but at some point there will be a problem. Your project manager must be a grown-up and be widely perceived as patient, trustworthy, and an honest broker. Hotheads and the arrogant need not apply.

Discipline. With all the moving pieces and personalities, your project manager must be personally reliable and disciplined. Someone who regularly drops balls or comes unprepared will quickly lose the confidence of the other participants.

The project manager must be knowledgeable, mature, disciplined and a great communicator who is sufficiently senior and well-supported in the organization. These traits are non-negotiable!

Communication. Both style and substance matter here. The project manager must be open, unafraid, and ego-free. It is as important to listen to what people are saying and understand what they mean as it is to inform them of what's going on.

Status. The project manager needs to have juice arising from (a) her/his position on the org chart, and (b) the visible support and public sponsorship of her/his manager to command the troops. This can be a stretch assignment for a promising employee looking to advance, but the scaffolding needs to be in place to support her/him.

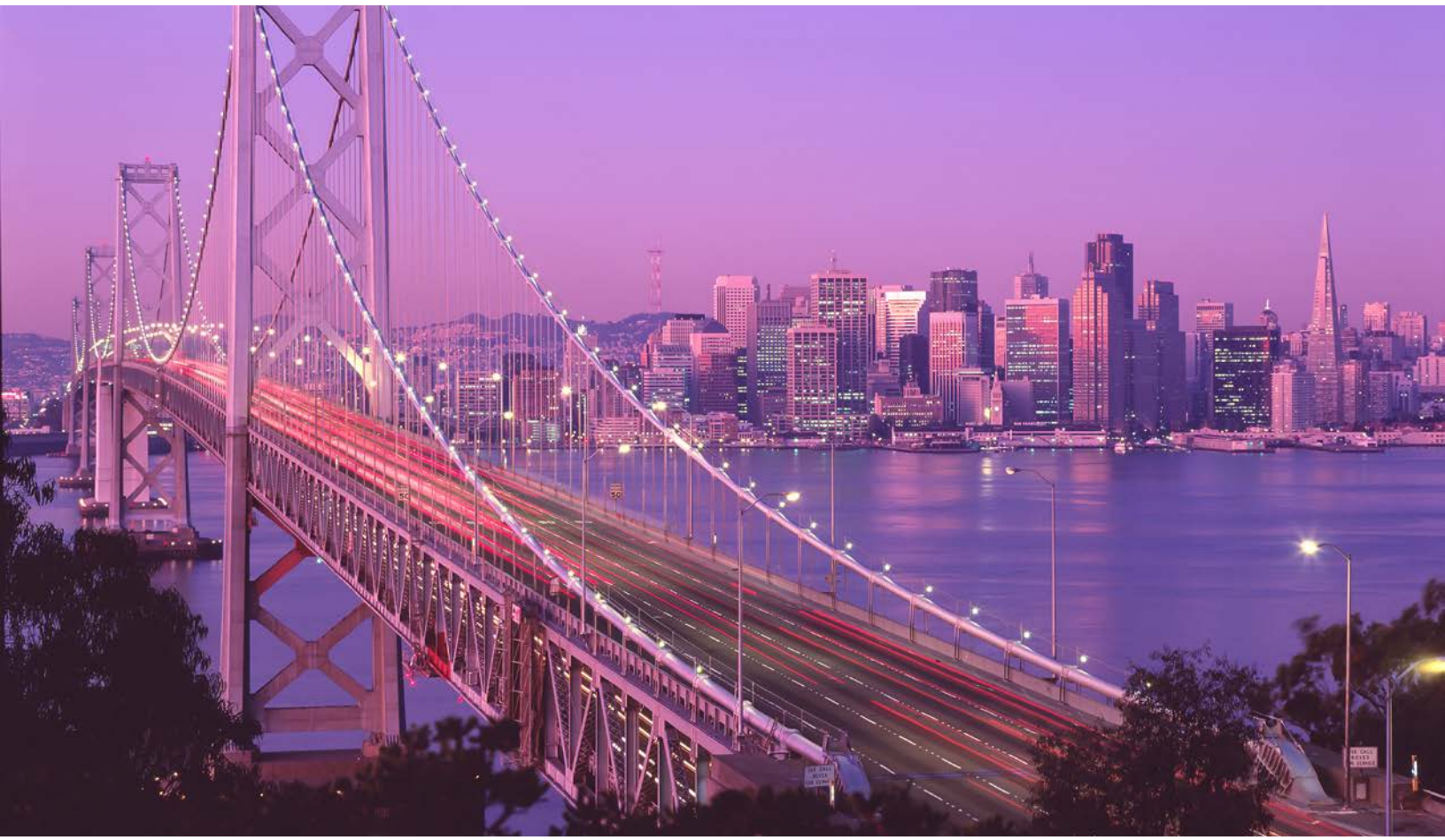
Knowledge. Knowledge is table stakes. Fluency is important. The project manager doesn't need to know every single detail by heart, but s/he should be able to quickly summon information as needed and understand how the pieces fit together.

We reiterate here that the above factors are non-negotiable. If these traits don't describe you, find someone better qualified to help.

Conclusion

Managing the people and politics of change in any context is hard work. Doing this in a research context is no different. For all the toxicity that can bubble up in any organization, it is not a job for the faint of heart or the glory hunter. Success is possible only from the hard work and leadership of a trustworthy project manager who, through good planning and communication, creates a framework allowing people to imagine a different future in whose creation they feel meaningfully included.

CHAPTER 5: BUT WHAT ABOUT ..?



In chapters 2 through 4, we've provided a framework for managing operational, methodological, and political change. This chapter addresses a number of remaining questions that don't fit neatly in the other chapters. This may not be a complete list, but it's a good reflection of what's on people's minds.

If we have to make it shorter, what do we do with the other stuff?

This is a common question from buyers who are used to running multi-objective or just simply longer studies. It's rooted in three assumptions that themselves need to be challenged.

One is that respondents must answer all questions in one sitting so that the data can be associated across different modules. While there are interesting analyses that show the promise of linking data, this would effectively turn a "small data" project into a "big data" project, unless you are comfortable with holes in the data, and have access to the people and tools to infer data at scale. A better solution is to isolate the

essential questions that need to be repeated and run a second study with an identical sample. The economics of this can still work, assuming you're not using an expensive legacy supplier who, like a taxicab, charges a chunk of money upfront just for getting in the vehicle.

Use statistical techniques to reduce question length or ask questions separately with an identical sample specification.

A second assumption is that the questions need to be asked all the time, implying that the behavior or attitudes being studied are constantly changing. Unless you're in a fast-moving market, odds are a lot of the segmentation variables you use or the contextual questions you ask don't change very frequently. Asking them constantly runs up the sample bill, and the toll on the respondent for little value. Instead, either run a study less frequently, (once every six months, for example) to see what's going on, or—if you feel you need constant data collection use statistical techniques (or your own good judgment) to reduce the number of these questions to the essentials.

The third assumption is that a survey is the right tool, or the only tool, for the job. There are a variety of new techniques available to help understand everything from word-of-mouth connections, (social network analysis) to emotional/physiological response regarding ad testing (collectively termed neuroscientific approaches), to merchandising (beacons and virtual reality). These solutions are getting closer to the point of execution and may even be included in the price, like live A/B ad testing with inferred demographics. Reducing your tracker length, especially if it meaningfully reduces price, doesn't necessarily mean losing information.

What are sample providers doing to address the problem?

The "What about the data I'm losing?" question above is often accompanied by some frustration that, our tried-and-true methods no longer seem to work. From there, it's just a short step to wondering whether sample suppliers are doing all they can to provide engaged respondents.

Some are, some certainly aren't. Then there are many who are somewhere inbetween. Two things sample companies have been generally good at doing are educating people on how respondents actually participate in surveys, and recommending best practices. Beyond that, though, the economics start to create tradeoffs.

If sample companies were to, say, stop providing sample for researchers who field long, non-mobile-friendly surveys, they'd surely see significant revenue declines, especially given the increasing transparency of pricing through programmatic sample platforms. This doesn't absolve them of responsibility, though. Some companies are taking smaller steps, by holding back respondents who, by virtue of the questionnaire, are guaranteed to have a poor experience. Panel companies have to do this: panelists who abandon studies are far more likely to never take another survey again for that company. Sending people on mobile devices to non-mobile-friendly studies is a very expensive, self-inflicted wound.

> Sample providers are generally doing what they can to provide engaged respondents, but they are the tail wagging the dog when researchers run long studies. Holding them responsible for outcomes is like blaming a bartender for your hangover.

In short, sample providers are generally doing what they can to provide engaged respondents, but they are the tail wagging the dog. Moreover, holding them responsible for outcomes is like blaming a bartender for your hangover.

Are these new research technology companies reliable?

Yes, increasingly. In a nice confluence of interests, we are seeing a lot of researchers moving to new MR companies because they see them as places where the industry is re-inventing itself, with legitimately better solutions. Likewise, we see new companies seeking researchers because they know they need credibility. Thirdly, there is great work being done to establish the validly of new techniques that are on public display at conferences from IIEX to CASRO to ESOMAR.

This is ultimately an easy thing to both spot and evaluate. Look at the people working for them.and check their backgrounds., then ask them for help.

What if my organization is broken, or refuses to accept the change? Or, what happens if the data are wacky?

We put these two questions here because they aren't as different as they sound. Your job will be much harder in a tightly competitive market, or a publicaly-traded company, or in a poorly-run one.

While it's not impossible to find radically different data, the process of going over the existing methodology with a fine-toothed comb and carefully testing it tends to smooth out the sharpest edges. But, at some point, the data will be just different enough to be unacceptable to someone. You'll need to provide some sort of grounding for the change that is connected to the past.

In any situation, it behooves you to find as many senior leaders as you can in your organization who are constructive and willing to listen. You will need to earn their trust, which is possible through the techniques and process we've described in this book. There will be places you need to have quiet conversations with people, to find a way through uncertainty or difficulty.

If you get to a point where people have doubts about the new version, you may have no other choice but to hold up the old versus the new and compare pros and cons. If you've gone through the right preparation and process, you should be able to present the clear winner.

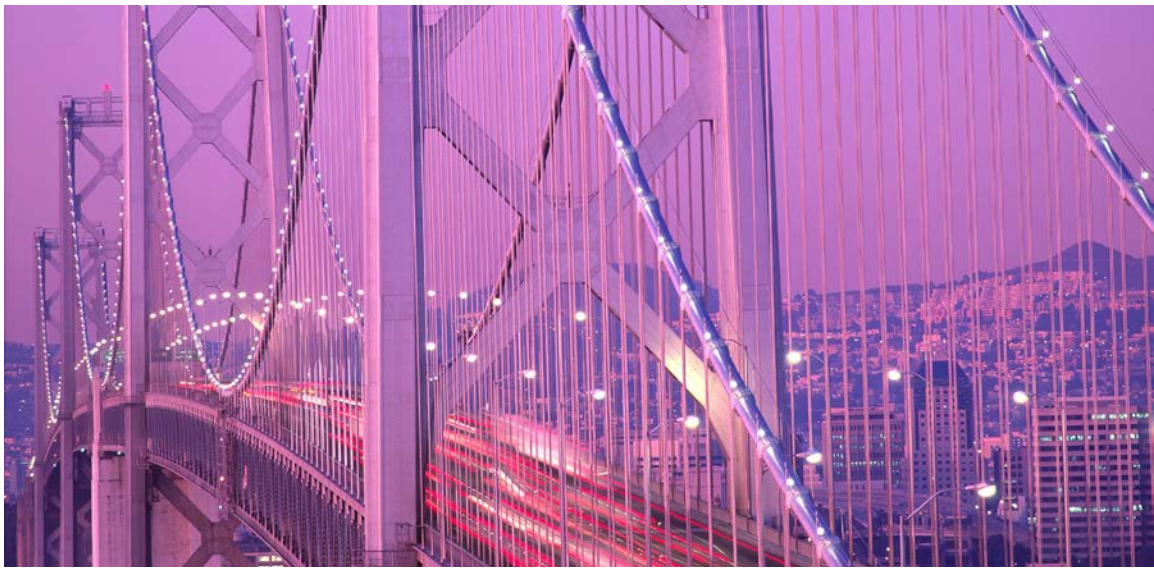
Should I rip off the Band-Aid or gradually make a change?

Our point of view is pretty unequivocal. Gradual change is a wonderful idea that falls woefully short in practice. The trouble with "smoothing it in," over one year for example, still leaves you with a trend break. By the time you're ready to look at the data from the current period, it will be significantly different from the same period the previous year, and you'll be in the same boat. This leads people to then propose stretching the change out over multiple years, which is just a bad idea.

Put differently, we recommend just making the change.

There's no doubt that the questions above are challenging. They may leave you feeling like the risks are too great. If you are going to consider a tracker change, you need to think about all the contingencies, and be prepared to address them.

Conclusion



If you've made it this far, we hope you've found the ideas and practical guidance instructive and promising for your situation. There are a few broader themes we've left implied in this book that are worth mentioning in closing.

Don't rush it

While you don't want to waste any time, the process of changing a tracker or normed study is one that doesn't work well without careful preparation. All the steps need to be followed. The stakes are too high to take shortcuts.

The people matter a lot

Whether it's the executive sponsors, the participants, the project manager, or the uninvolved observers, how you handle the people will matter as much—and in some cases more—than the methodology and process.

This process works

Yes, there's a lot to do. But this process has been proven across multiple trackers in multiple countries. Good luck, you can do it.

APPENDIX: TL;DR
A SUMMARY FOR THE "EXECUTIVE" READER.

Chapter 1: How did we get here?

Consumer behavior has changed dramatically, leading to data and fielding problems especially for long desktop-only trackers/normed studies that many companies use to determine market share, understand brand awareness and competitive position, and evaluate advertising effectiveness and satisfaction. A case for change is made by asking four main questions.

- Are we measuring the right thing?
- Are we talking to the right people?
- Are our methods and techniques fit for purpose?
- Are we managing these studies efficiently?

Chapter 2: The project plan

Change can be managed through a five-step project plan where each step has milestones, deliverables, and measures of success. This chapter also covers the discipline and frequent communication needed.

- Phase 1: Investigation
- Phase 2: Design
- Phase 3: Testing
- Phase 4: Analysis
- Phase 5: Implementation

Chapter 3: Managing the methodology

The research elements of the change can be broken down into three categories:

- Changes to the questionnaire format
- Changes to the sample composition
- Changes to the questionnaire content

There are four questions researchers can ask to facilitate their efforts.

- Do we need to shorten the tracker?
- Do we need to better reflect the market?
- Do respondents understand and complete the survey as expected?
- What sample size do we need to report at, and how does this impact frequency of tracker waves?

We recommend a think aloud pretest for the questionnaire, and a full parallel test for the revised tracker to understand what has changed and why. If the data do change, we argue against manipulating it and in favor of making the change immediately following very transparent, and public vetting of the data to socialize the change.

Chapter 4: Managing stakeholders

The political implications of any tracker change are always the most challenging. There is no such thing as overcommunication with stakeholders. Discovery sessions are important to understand who is using what data, and which data points are most sensitive. Participation is equally important, but personalities and group size must be managed. Steering committees can help narrow the audience of decision-makers, but communication must remain frequent and transparent. Above all, an honest, disciplined, and respected project manager is needed.

Chapter 5: But what about … ?

Research buyers have questions about the sacrifices they see themselves making. One of these is what they should do with the things they perceive they are losing. There are a variety of strategies to address this. Some topics can be legitimately dropped, while others can be measured better, separately or less frequently.

It's worth noting that suppliers have skin in this game too. Some are active proponents of the topics discussed herein, though they fall short of insisting on change with clients because the economics are unfavorable. Buyers who have questions about the credibility of new suppliers or methods can, through meetings and conferences, find suitable validation.

Conclusion

Don't wait to do this, but don't skip steps especially with planning and testing. The people involved will fundamentally determine success. This process works.

For more information, please get in touch with us
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