Five Dangers of DIY Research (And Three Ways To Do DIY Research Right)

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Introduction

This white paper is composed of two articles that were originally published on The Research & Planning Blog (http://blog.researchplan.com). The articles have been edited and updated for consistency's sake.

The first section, Five Dangers of DIY Research, outlines some of the problems that can occur when those who are not trained in field research attempt a "do-it-yourself" (DIY) solution, often for budgetary reasons. The information that can result from these studies is often dubious and can be used to support decision-making in an improper (and sometimes dangerous!) manner.

The second section, Three Ways To Do DIY Research Right, offers a blueprint for three methodologies that firms can use to conduct research without needing to bring in the professionals.

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Five Dangers of DIY Research

Like many segments of the business world, the marketing research industry has weathered a few tough years as the US economy has sagged and budgets have dried up. One of the by-products of the recent recession has been that many firms have taken at least some of their marketing research internal, forcing marketing managers and analysts to conduct inexpensive research online or through no-frills focus groups.

Naturally, some of the professionals within the marketing research industry feel threatened by this shift because it means that the work they've relied on for so many years is suddenly drying up. But there are others, like myself, who are concerned about "do-it-yourself" (or DIY) research for far more practical reasons. The information gleaned from DIY research often is not conducted with the careful concerns professional researchers build into their designs, nor is it qualified by any limitations when it is presented.

Here are five reasons why DIY research can be a dangerous practice for your company... and five suggestions for how you can turn things around if you're already committed to a DIY study.

1. **DIY Research is rarely done with a proper sample**. In the world of marketing research, the method used to sample a population is an enormous concern. If you use the wrong sampling method, you can potentially bias your results towards a point of view that is not representative of your entire target market… and that can be dangerous if you're about to make a decision upon which millions of dollars hinge.

There are two primary categories of samples: probability and non-probability. Another name for these would be random samples (which are assumed to be normally distributed) and convenience samples (which are not). If you are conducting an online survey, making phone calls from a list you purchased or sending mail surveys out to predefined ZIP codes, chances are good that you're using a convenience sample.

It's not necessarily a bad thing to use a convenience sample. In fact, a lot of marketing research is done with this sampling method because it's quick and easy. But the problem is that a convenience sample has many limitations — chief among them the fact that you cannot apply statistical tests or techniques to your findings appropriately. While this might not sound like a big deal, it's an important distinction if you're trying to compare perceptions between two groups or make comparisons with past data – two of the most common uses of research. With a convenience sample, these comparisons cannot be made appropriately.

In the end, all you can really do with a convenience sample is examine what the people you spoke to have to say about something. That can be good and useful if you're just trying to get a general read on things or diagnose problems. But it can be very bad if you're trying to gain sophisticated information about a target market so you can develop a better product or service.

So, how do you deal with a convenience sample if you're in the midst of a DIY project as we speak? The simple answer is that treat your findings like blips on a radar rather than as detailed, photographic images taken from a satellite. You can use your findings to make general decisions and, of course, to commission more detailed research. But what you can't do is make decisions based solely on the differences between the blips, nor will you be able to tell if other blips like them will appear in the future. You just don't have enough of the right information to do that.

2. **DIY Research is rarely conducted with appropriate scales**. Quick, on a scale of 1 to 7, with 1 being lowest and 7 being highest, tell me how you feel about the performance of the last set of tires you bought for your car. Ready? Go.

Are you confused by the question? I know I'd be. Who really can sit down and think up seven different points of differentiation in terms of their car tires? The tires either work or they don't. I can either be satisfied or dissatisfied, or perhaps neither. At most, that question requires a three-point scale.

On the other hand, let's say I want to ask you to evaluate your overall satisfaction with the last car you purchased, and I give you three choices: dissatisfied, neutral, or satisfied. Can you effectively rate your satisfaction with your car on a three-point scale? Chances are good you'd prefer to have those seven points of differentiation I just gave you for the tires.

These are some of the many questions that must be asked when developing rating scales. And the really tricky part is that much of scale development has less to do with the comfort of the respondent and more to do with the aims of the study. For example, if I were a tire manufacturer and the study was with professional drivers, I might need to offer a more sensitive scale than I would with the average consumer. If I were a luxury car manufacturer, I might be more interested in measuring the minute differences between satisfaction than I would be if I were selling mass-market vehicles.

And then there's the question of what the scale is actually measuring. Satisfaction scales are common, but are they always appropriate? Is it really telling you anything to ask a respondent how satisfied they are with their tires? Maybe it would be better to ask them how effective their tires are in icy weather, or how safe they feel with the tires they have. Those are far more pertinent questions when it comes to using information to make marketing decisions.

So, how do you ensure your scale is appropriate if you're already committed to DIY research? I would recommend thinking critically at what the data will tell you. You should also test your scale before you release your survey. If you find that your sensitive scale is getting too many top or bottom choices, you can probably reduce sensitivity. If you're finding that your three-point scale is getting a lot of neutral answers, you should probably increase sensitivity.

But granted, all of these measures are worthless if you miss out on the next concern:

3) **DIY Research rarely is tied to established objectives**. When a marketing research professional begins working with a client, he or she will often insist on hammering out a specific list of research questions that need to be answered and accompanying, bullet-pointed research objectives that will help to answer these questions. These questions and objectives guide the development of the methodology and the research instrument (survey, moderator's guide, and so forth). Ultimately, the purpose of the research is to provide the information needed to make one or more decisions.

But DIY research rarely seems to be developed through such a systematic structure. Rather, DIY surveys often include everything the marketing team can think to ask – a sort of "everything but the kitchen sink" approach. There is no plan for analysis, no thought given to what really needs to be known, and no consideration for the effect of one set of questions on another. Demographic questions are often far too personal, and screening questions are typically absent.

It is impossible for good, solid marketing research to take place without objectives, because the objectives serve as the backbone for the entire study. What you tend to find with DIY surveys is that there are a lot of questions that offer the "nice to know" information, but they don't help the marketing managers make good decisions. Some marketing professionals will try to cloak the lack of relevance by spouting off lots of useless statistics generated from cross-tabs. But in the end, nothing is really learned, and a lot of time is wasted.

If you're already in the midst of a DIY study, the solution to this problem is to sit down and systematically identify the purpose of the research (called a "problem statement"), the questions that need to be answered to solve the problem, and the information needed to answer the questions. Use that framework to develop your questions, and don't go beyond it without first adjusting the structure. (Screening questions and demographic questions are the only things you don't have to tie to objectives, but use them sparingly.)

You should also develop a set of action standards constructed in the "If X, then Y" format. For example, "If more than 50% of our customers aren't satisfied with our new logo, we'll begin the process of changing it."

4) **DIY Research often results in respondent fatigue**. Imagine that you're in a focus group where the moderator is so unsure of himself that he keeps asking the same questions over and over because he wants to make sure that he didn't miss anything, even though you've been going for two hours. Or imagine that you're taking an online survey that should take only 5 minutes, but which is only halfway done by the time you reach the 15-minute mark.

Both of these scenarios are breeding grounds for "respondent fatigue," where participants in the research are simply too weary of the process to be of any use. It's a common circumstance when the team conducting the field work doesn't have any real experience with research.

If you're already committed to conducting a DIY survey or some DIY focus groups, the best way to put a stop to respondent fatigue is to limit the scope of your research. When you're developing your objectives, stick to what's relevant, and don't go into too much detail. In a focus group, you can probe questions if the answers your respondents are offering aren't sufficient. In a survey, you can include one or more open-ended questions (or optional probes) to shed light on any attitudes or ideas that need further explanation.

5) **DIY Research often has terrible questions**. Ask any marketing research professional, and he or she will tell you that writing questions is one of the toughest aspects of the job because very complex ideas have to be asked in the most simple and straightforward manners possible. What's more, a question that seems perfectly obvious to the research team might baffle less sophisticated respondents, or even be taken to be asking something else.

The most common variety of bad question is a question that is unclear or vague. *Describe your feelings about buying our brand of peanut butter*, a question might ask, and then provide a set of canned responses, with the instruction, *Pick three of the following responses*. Every respondent is going to interpret the question differently, and the canned responses are only going to make the data more worthless, because some respondents are going to be frustrated at not seeing choices that suit their own interpretation and just tick off the first three boxes they see so they can move on.

Consider this focus group prompt: *I'm going to ask you all to imagine that you are a bag of chips. Now, on the pads in front of you, I want you to write down what you like about yourselves and what you wish was different*. This could be seen as a creative exercise with some interesting projective qualities, but consider for a moment the sort of junk data that is going to come from the creatively-frustrated members of the group. Who can really relate that well to a bag of salty snacks?

Some questions are double-barreled: *Do you think that the President is honest and trustworthy?* I might feel that he's one, but not the other. *Would you say that your bank is small and helpful, or large and impersonal?* I might feel any combination of those adjectives. In both of these questions, the response will be unclear. Thus, it's important to ensure that questions are asking about one characteristic of interest – not two or more.

So, how do you improve question design if you're conducting a DIY study? As it happens, there is something of a science to asking questions, and there are numerous books available that offer academically-validated scales and measurement tools. Another means of improving question quality is by employing a pilot test of a survey or moderator's guide with some potential respondents. This will help to ensure that questions make sense, that responses match up, and that respondents aren't confused.

Three Ways To Do DIY Research Right

Now that we've established that DIY research can be a perilous endeavor, it's worth asking – is there any DIY research that a marketing manager with limited research training **can** conduct safely?

The answer is yes, and I'm going to offer you three suggestions for simple studies that you can put into practice on your own, with the added cost of requiring little in resources or expenditures.

But before we begin, some caveats...

None of these studies is scientific. That doesn't mean that they're useless; it just means that they're not generally projectable to your market and that they will probably have some bias built in. That's OK, because all of these studies are primarily intended to provide you with basic information that can help you identify opportunities and threats. They'll help you see blips on your marketing radar. But if you want to understand more about those blips, you'll have to do some more specific research, probably with the aid of professional researchers.

None of these studies will be useful for more than some basic analysis. If you want predictive models, perceptual maps or market segments, you're going to need a few things that these studies won't offer. You're not even going to be able to make statistical comparisons between groups. What you ***will*** be able to draw out of these findings are some basic descriptive statistics, a few crosstabs, and some verbatim comments that can illuminate what your customers are telling you.

None of these studies will be useful for diagnosing anything other than your current market climate. They should not be used to test new concepts, nor should they be used to gather information about your competitors. They will not describe trends in your industry, either. If you want to conduct those sorts of studies, consult a professional, because many sophisticated considerations need to be taken into account, and a professional will have the right amount of training and/or experience to help you avoid the pitfalls of that sort of research.

With that said, here are three studies you can conduct on your own, for very little money:

Diagnostic satisfaction study: Satisfaction studies are one of those sorts of things that marketing research firms are often approached to conduct, but which don't necessarily require high-level research. It really depends on what your objectives are and who your target population is. I would suggest that this sort of study is best conducted with your own consumer customers when your intention is to diagnose whether or not you have any service failures that require immediate correction. If your context is B2B or health care, however, be advised that it is very difficult to get busy physicians or executives to complete surveys of any type, even if an incentive is offered.

Setting up the satisfaction study is simple. You can do it online, you can do it via the phone, or you can do it through a mail-in survey. Remember, the purpose of the study is to diagnose where service failures are occurring, so all you really need to do is walk through the high points of your service process and ask respondents to indicate how satisfied they are with each step of the process. I would suggest using a 5-point scale that ranges from “Extremely dissatisfied” (1) to “Extremely Satisfied” (5). Any time an answer of 2 or 1 is offered, the customer is indicating a level of dissatisfaction, and the survey should probe the respondent to explain the reason why he or she is not satisfied.

Begin each study with a screener question asking the respondent when the last time he/or she used your service was. Keep your satisfaction questions short and to the point; always ask about a single element, and resist the temptation to ask about things that aren’t directly related to the service exchange. I would advise asking no more than ten questions so your respondents don’t get survey fatigue.

End your survey with two open-ended questions: *How can we improve what we're doing?* and *Why would you (or would you not) recommend us to a friend?*

Once a month, put all of this in a spreadsheet and look at the scores and comments as a whole. Look at the responses in terms of frequencies (i.e. the proportion of people who answered a 1, 2, 3, 4 or 5), not averages. Avoid looking at the individual responses, since they are likely to be idiosyncratic and might simply represent the views of a customer who is always difficult to please. Rather, look for patterns. If you have 100 responses, and 25 or more customers are indicating that they are dissatisfied (by offering a 2 or 1) with an element of your service operation, you know you’ve got a problem. The next step is to conduct some internal or scientific external research, either on your own or with a research firm, to discover what is causing this dissatisfaction to occur.

Don’t feel the need to address every little problem that occurs, particularly once you read the verbatim comments. Your customers are going to be happy that you asked them in the first place; they don’t expect you to solve all of their problems at an individual level. Instead, look for patterns and work to resolve them from a training or systems perspective. Many service failures are caused by employees meaning well, but acting improperly because they are not trained in what they need to properly do. Don’t go on a witch hunt unless it becomes abundantly clear that a particular employee is being singled out for bad behavior.

Surveys should ***always*** be anonymous and confidential. The one exception to this rule is that you can ask respondents if they would like to volunteer their personal information in the event that they had a problem and would like to be contacted so that it can be resolved. Make sure it is very clear that this is voluntary, though, and ensure that any customers who are contacted for service recovery are informed that their other opinions are being treated anonymously in analysis.

Diagnostic satisfaction research can help you to minimize threats to your business, but it can also present you with opportunities to expand your services. If several customers tell you that they want something, you should consider looking further into that service. But again, use this as a means to guide further research, and **not** to add options or new services in a cavalier fashion.

Front-line Focus Groups. Whether you manufacture goods or provide services, you're ultimately going to have front-line staff members who deal with your customers. These employees typically work in roles such as sales, customer support, customer service or billing. And while they may not see the organizational goals as clearly as people higher up in the organizational structure, they definitely have opinions about how things could be done better. And what's more, their views are important, because they're the people who spend their days listening to customer feedback and representing your firm!

Fortunately, it's not hard to get them to share this information with you. Often, they're dying to offer it. What you have to do is provide them with a comfortable place in which to do it. I'd recommend hosting a series of lunch meetings where you invite eight to ten front-line employees per session and have someone from marketing or HR sit down with them and run through a series of questions meant to diagnose where they feel they are not being supported enough, what tools they feel they are lacking, what they are hearing from customers, and what ideas they have for improving relationships with customers.

(While it's preferable to have an independent moderator conduct these groups, support staff such as the marketing and HR departments are generally not viewed as threatening. Managers and executives, on the other hand, should not even be in the room!)

Conduct these groups in a place where the staff will feel comfortable, and do your best to include as many front-line staff as you can. (They will surely talk to each other, so if you exclude someone, it will probably hurt your effort more than it helps.) If you have to be selective, be transparent and let all of your front-line staff know that a study is being conducted with people who have been randomly chosen, and that the results will be shared with everyone. That way, at least they won't feel like it's their fault that they weren't picked to voice their opinions.

Rather than examining each group individually, look for common themes amongst groups. Some of the themes you'll hear will go against the big-picture strategy, such as, "We need to do more advertising," or "I'd like to be able to offer more discounts." But other themes will likely show you where a few internal tweaks can make a world of difference. You'll also hear about best practices that you didn't know people were using and customer problems that you had no idea were occurring.

Once the data collection is complete, put all of the information into a single report and strip away any identifying information other than the department in which respondents are located. Do not show video tapes or play audio tapes for anyone outside of the research team; you want to protect the confidentiality of your participants as much as possible. When the report is compiled, offer an abbreviated version of the findings to the entire company. Use the main findings for guiding strategy and development.

Focus groups with employees offer an additional psychological component of encouraging people to be comfortable and, therefore, honest. Individual interviews can also be effective, but respondents are much more prone to fall prey to interviewer bias – i.e. telling the interviewer exactly what they think he or she wants to hear.

Customer Complaints Study: If you have been in business for any length of time, chances are good that you have a stack of customer complaints that have come in through various channels. But are you putting these complaints to use to search for opportunities for improvement or threats to your customer base?

The first thing you have to do is determine through which channels complaints make their way into your company. You may have a customer service department that deals with issues on a case-by-case basis, but are you having your front-line employees report complaints (and how these complaints have been dealt with) up the chain of command? Are you keeping track of complaints that are coming in through unofficial channels, such as e-mails or phone calls to corporate staff? What about complaints that are posted on online forums or on social media, but never directly made to your company? Make a map of complaint behavior and try to understand every way in which complaints can come in to your company.

Next, develop a standardized means of entering complaints into a database or spreadsheet. This is generally best accomplished by analyzing the type of customer, the type of complaint, the channel used to complain, the topics of the complaint, and the resolution of the complaint. So, for example, if a customer e-mails your corporate office complaining that he or she did not receive a promised discount and that he or she is seeking satisfaction, you would want to break it down like this:

- Name of Customer, along with known contact information.
- The type of customer, from your company's point of view – new, occasional, frequent, or so forth. These categories should be pre-defined and fairly objective in nature. It is also a good idea to cross-check this information if it is available or known.
- Note that this was an e-mail complaint. Include details about which address was used, when the message was sent, who was CCed, and so forth.
- The topics of the complaint along with relevant verbatim comments, preferably by category, such as "Broken Promise" and "Discount Error".
- Any resolution that was offered, broken down by the same topic categories used in the previous entry. If no resolution is offered, simply write, "Broken Promise: None."

The same system can be used to record complaints found on Web sites or online forums. It is also a good idea to have customer service representatives use this same framework in writing out complaint resolution reports.

Once the data is being consistently tracked, you can begin to mine it for common threads. This can be done by hand, but it can also be done with content analysis software and keyword matching. Any of these methods will ultimately help you to see what sorts of complaints your company is dealing with on a regular basis... and your analysis will help to guide improvements in your marketing and in your company's training and development.

Closing Thoughts

You might be wondering why a marketing research professional would offer to teach you how to do this research on your own. "After all," you might be thinking. "If I do this research, doesn't that mean that you'll have less work available in the long run? What do you have to gain from all of this? Aren't your colleagues going to be upset?"

These are valid questions. But believe it or not, most marketing research professionals encourage marketing departments to do some research on their own. We're not threatened by it in the slightest, because we understand that the more that marketing managers are involved in the research process, the more they'll see the value of conducting research. They're also going to have a much greater appreciation for the work we do and a much better understanding of what research can do for them.

With that said, if you are interested in any of the techniques above and have any questions about how you should go about implementing them, send me an email or give me a call at 314-962-0083 x102. I am happy to assist you in any way that I can!

About the Author

Sean Jordan is the Research Director for the Research & Planning Group. As a graduate of the Master of Marketing Research program at Southern Illinois University in Edwardsville (one of the only professional marketing research post-graduate programs offered in the nation), Sean is equipped with a wide array of quantitative and qualitative research techniques.

As an experienced professional researcher, Sean possesses a number of skills that aid him in research design, data analysis and report presentation. Never shy in front of a crowd, Sean is a skilled presenter and focus group moderator, and he has directed dozens of focus group studies during his career. And with his experience as a professional journalist, Sean is also an ideal interviewer for one-on-one and small group interactions.

Sean is also an expert in the fields of social media, quantitative research, online research, and mixed media research. When he is not conducting studies for clients, Sean is involved in researching the generation commonly known as "millennials" (those born between 1980 and 2000) and the field of neuroscience.

Sean's marketing background is diverse as well; he has been recognized as an outstanding guerilla marketer in retail sales, and he successfully vaulted an independent comic book company from obscurity to bestselling publisher during his time as marketing and public relations director.

Sean also maintains a daily blog filled with marketing research insights at http://blog.researchplan.com.