

‘Developing creative solutions to meet the unique demands of the Life Sciences Industry.’



Lifescience Dynamics Ltd  
28 Briar Dene  
Pinkeys Green  
Maidenhead  
Berkshire  
SL6 6SF  
England UK

Registered in England No. 5214740

## **Managing a market research project – A check list**

These guidelines are divided into a number of discreet sections following the chronology of a typical project.

### **Defining Information Needs**

- Be clear why the information is required and the decision to be made.
- Review existing sources of information.
- Identify information gaps to be addressed and redefine information needs if required.
- Give some thought to which methodology might be appropriate.

### **1. Choosing and Briefing an Agency**

#### **The Brief**

The client is responsible for providing the following written information:

- Overall objectives, both marketing and research.
- Background information: therapeutic area, brand and marketing.
- Deadlines for both the proposal and project results.
- Main and secondary contact.
- Deliverables required e.g. tables, report, and presentation.
- Countries
- Broad idea of budget.
- How many agencies asked to pitch?
- Which methodologies thought appropriate?
- Target groups example doctors, patients, peers, etc.

Any recruitment criteria which might apply e.g., target doctors and any other constraints.

- Level of involvement of local subsidiary companies example checking translations attending fieldwork.
- Any preferences for local field work suppliers.
- Briefing preferences; central, telephone.

#### **Preparing a Short list of Agencies.**

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- Relevant experience
- Relevant resources
- Personal experience of the agency
- Creativity
- Involve key people in the choice.
- Agree who to involve in the briefing
- Inform relevant parties that research being conducted.

### **The Proposal**

The client should agree with the agency, the form and style of the proposal required, e.g.: full or later and who will be reviewing it.

The agency should include the following in the proposal:

- Restate objectives, including any changes to the brief as a result of a discussion
- Detailed time plan
- Client responsibilities e.g. supply of test material, liaison with local subsidiaries, supply of sample lists, translation checks
- Project team
- Proposed fieldwork agencies.
- Use of freelancers for any part of the project
- Recruitment criteria
- Sample sizes, including the number and spread of sampling points
- Format in which the data is to be delivered, e.g. tables, data files, databases
- Costs split out as agreed, and likely costs of optional elements e.g. briefing meetings, viewing and simultaneous translation facilities, country specific reports, extra meetings
- Payment details
- Terms and conditions of business

## **2. Working with an Agency**

### **Deciding upon on Agency**

- Be clear who will be running he study
- Check reliability of the sample
- Ask about quality procedures especially interview validation
- Check confidentiality agreements

### **Project Acceptance**

- The client should accept the project in writing, confirming the total cost, and specifying details of any options included in the Proposal e.g. sample size, countries etc.
- If there are any material changes to the proposal document these should also be specified. The client should notify each unsuccessful agency that they have not been successful, and give reasons why they were not successful
- Remember to get budget authorization for the project and to initiate any necessary purchase orders

### **Fieldwork and Analysis**

- You should prepare and assemble the concepts and other stimulus material required by the agency
- The client should approve the interview documentation including recruitment questionnaires
- The client should inform the agency as early as possible of their intention to attend fieldwork, so that provision can be made
- If the client is attending fieldwork, they must be familiar with the Code of position to the respondent, and the respondent's right to anonymity
- The agency should provide regular updates on the progress of fieldwork and to notify the client of any time delays, and reasons e.g. recruitment problems, late delivery of interview material, delay in acquiring sample lists etc.
- Clarify data entry/analysis procedures including data editing and cleaning in quantitative projects and depth of analysis for qualitative projects.

### **Reporting the Results and Evaluation**

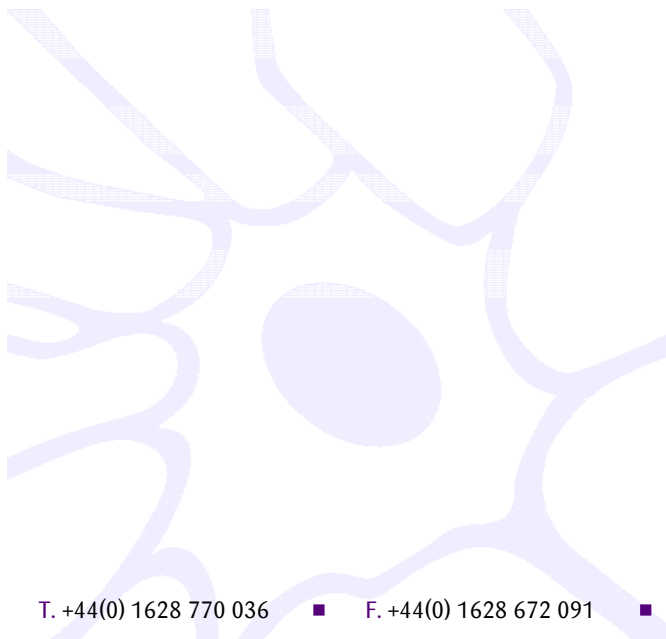
- The client should inform the agency if they require prior sight or discussions of the results, and time should be allowed
- The agency should be told of the personnel attending and their responsibilities, and any particular issues which might be raised
- Agree length of time required and whether material to be circulated prior to presentation
- Ensure appropriate equipment is available
- How many paper copies of the charts to be made available, and whether copies of the slides are required/electronic copy
- A written report would normally follow the presentation in order to incorporate discussion points. Before the report is written its format and timing should be agreed
- If copies of interview material, especially video are provided to the client, they should be aware of the ESOMAR guidelines relating to its use, again with particular reference to respondent anonymity
- After the presentation and/or delivery of the report, there should be a discussion between the agency and the client to review the project
- Where relevant a project evaluation questionnaire should be completed and returned to the agency

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- Agree what follow up is required with both the agency and internal clients

Prepared by EphMRA – Primary Research Methods & Training Committee [PRM&T]



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