

“Why didn’t we ask (*insert question here*)?”

It’s happened to all of us. You’re presenting research findings and a key stakeholder asks this question. Often large scale, marketing research projects do not start with the right preparation. This can be solved by hosting a **Success Criteria Workshop** before questionnaire design even begins. Typically, in this type of workshop, the following will be discussed among key internal stakeholders:

- What you *know* is true,
- What you *think* is true,
- What *answers* you need, and
- What you *imagine those answers will be?*

The key benefit of Success Criteria Workshops is to make sure the research and outcomes are crystal clear. As a result, the research meets organizational needs, drives immediate actions, and enables a process of faster, data backed decision-making.

Here are 8 Tips for preparing a Success Criteria Workshop:

1. Gather all available information.

Start by unearthing any and all existing organizational knowledge. What do you know is true? Agree on what is truly known and what is not.

2. Get deep into the organization.

Beyond Marketing and Market Research, reach across silos and include key organizational teams. We mean the C-suite, Product Management, Operations, Distribution/Supply Chain, Sales, Customer Service, and yes, even Finance.

3. Lock everyone in a room!

Block off two hours at a minimum, and make it easy for people to attend in person.

“In-person” is important, and is different from a call or video conference. Let everyone hear the project objectives, ask questions, prioritize topics to be covered, and agree on how the findings will be used.

4. Provide tools.

This discussion needs to be planned and facilitated to make sure the core issues are identified and evaluated. Give participants exercises such as Empathy Maps, Like/Wish/Wonder, and Key Topic Boards.

5. Leave time for real discussion.

A key purpose of the Success Criteria Workshop is to make decisions. Bringing all the team members onto the same page ensures the project will be completed efficiently – and without surprises at the end.

6. Get different perspectives and set parameters.

This is an opportunity to bridge internal silos. Understanding the different perspectives will ensure the research will address more issues and drive action on the back-end.

7. Prioritize.

The Success Criteria Workshop is all about creating value for the whole organization. Identify the most pressing information needs and put the rest in a “parking lot” for next time.

8. Define success.

Crystallize the specific type of answer the team is looking for. When the project delivers the information you are looking for, what will you do next? This question forces the group to think beyond research, questionnaires, and sample sizes.

Part therapy and part politics, a good Success Criteria Workshop is designed to help companies accelerate their decision-making process and minimize the odds of the research ending up on a shelf.

“A question well asked is half answered”
– A. Einstein

Call Russell Research today!

Russell RESEARCH

One Meadowlands Plaza
Suite 1001
East Rutherford, NJ 07073

Phone: (201) 528-0400
Fax: (201) 528-0210
russellresearch.com