

Decision-Focused Research for Association Executives

How to Get the Information You Really Need

By Robin Wedewer
Senior Consultant



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Bad Research, Good Research

At some point you have probably taken a survey that left you feeling frustrated. Perhaps it took 30 minutes to complete. The purpose of the survey probably wasn't clear since the question topics were all over the map. Maybe the survey had numerous open-ended text boxes where you were expected to write an essay. Or it had page after page of grid questions that made your eyes cross. Perhaps there were closed-ended questions that didn't list the response you needed or at least an "other" option. There are many things that add up to make for a bad survey experience for the participant.

For the association executive a survey experience is bad for different reasons. It is spending the money, volunteer and staff time—not to mention members' goodwill to participate—

and getting a report that, while interesting, doesn't give you any better idea what you need to do than before you started. The charts and graphs look pretty and maybe they even confirm that the association is doing a good job and that members are satisfied. But those charts and graphs don't shed any light on where you need to focus attention and resources or inform the discussion about serious decisions on the horizon.

The whole experience leaves you with the question, "Now what do we do?"

The purpose of this guide is to help you avoid this type of unfocused and unhelpful research. To do that we introduce the concept of decision-focused research and provide a brief

guide to getting started on developing a decision-focused research plan.

This is not a DIY handbook for conducting your own research. Amazon can help you out with a big brown truckload of page turners about questionnaire development, scales, data cleaning, coding and more. Rather, this guide is for the association executive whose job it is to guide the development of research goals and objectives. It is for the people who will do the hard thinking about the decisions that need to be made and the information needed to make informed decisions. A skilled researcher can help you with this task, but this guide will help to clarify your thinking before the researcher is even called in.

We hope to help you avoid bad research and get good research—both for your association and your members.



Why is Decision Making So Hard?

Some Decisions are Harder Than Others.

If only all decisions were as simple as ordering from a restaurant menu. The ordering decision in a restaurant is simple because the choices are fixed and the outcome of a decision is certain. If you order a pastrami sandwich on rye, you will get a pastrami sandwich on rye.

But sometimes the environments and the decisions are complicated.

Decisions are complicated when there are a number of options and there is at least one right choice—or best choice—from a list of alternatives. The decision about where to host the annual meeting might be a complicated decision. But with information about space availability, price, amenities, local attractions and member preference, there is a right answer to the complicated decision. Similarly, decisions about advocacy priorities or new product introductions may be complicated, but with the right information you can make the right choice.

Decision making becomes tricky in complex situations.

A complex situation or environment is in a continuous state of change. It is not clear what impact a decision will have since the outcome of the interplay of variables cannot be accurately predicted. Decisions about new membership categories or mergers with another association may be complex because of the unpredictability of the economy, how members will respond, the financial impact of change on the association or a host of other factors. Some researchers call this the “unknown unknowns.” In hindsight we

may be able to see why events unfolded the way they did, but it was difficult, if not impossible, to predict those events beforehand. We can narrow the choice of options with information to make what we believe is a good choice. But there are no guarantees of outcome with complex situations.

Rapid changes in the healthcare market create a complex decision making environment for associations in that sector. Information about how members and their employers are responding to the changes with their own practice policies, education priorities and budgets—even information about college students considering careers in healthcare—can inform decisions but may not be adequate to make accurate forecasts about the future.

Then there are chaotic situations, in which there may be no answer at all, much less a perfect answer. Crises and emergencies are often chaotic situations. A board member’s actions, which enrage members, is a chaotic situation. A major lawsuit against the association is another example.

Obstacles to Good Decision Making

Conditions in the environment also can make decision making hard. But even what should be straightforward, simple decisions can be complicated by any number of common obstacles. Structural barriers, such as cumbersome policies and procedures, can inhibit good decision making.

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Some of the most common obstacles to good decision making relate directly to a lack of relevant and timely information. Uncertainty and fear of making the wrong decision has led more than one association board to delay making important decisions—sometimes indefinitely. Similarly, making decisions that maintain the status quo is a common obstacle. Overconfidence in how well decision makers understand the issues or operating on assumptions about members, the situation and the environment rather than verifiable data can lead to disastrous results.

Reliable data can overcome a wide array of biases.

Associations that invest all their research activities in biannual member needs assessment surveys may be unintentionally throwing up obstacles to good decision making. Information needed for decision making can't usually wait for the next research cycle two or more years down the road.

What's an Association Executive to Do?

Two strategies are needed to deal with difficult decision making environments and overcome common obstacles to good decision making—developing a plan to

get timely information and understanding and prioritizing the planning phase of the research. The need for timely information is why so many associations are undertaking more frequent, shorter and highly focused surveys that take place throughout the year. Rather than a lengthy 20- or 30-minute multi-focus survey, these surveys are only five or ten minutes in length and focused on a single important topic. The shorter survey length increases member participation. And a single focus for the survey allows the researcher to field questions that delve more deeply into the issue than could be accomplished when that issue is folded into a much larger, multi-focused survey.

The research planning phase is critically important to ensuring that all research is focused on the information needed to understand the issue, contributes to solution development or choosing from among a number of previously-identified potential solutions.

It is in the research planning phase that decision-focused research is born.

Common Obstacles to Good Decision Making

- Problem and alternatives are not clearly defined
- Oversimplification of the problem
- A variety of biases, including framing, sunk cost, confirming evidence bias
- The status quo trap—favoring any alternative that maintains the status quo
- Overconfidence in knowledge and understanding of issues related to the decision
- Assumptions about the situation or the environment
- Uncertainty and fear about making the wrong decision

The Decision-Focused Difference

Decision-focused research is a methodical approach to information gathering for the purpose of understanding an issue, identifying potential alternatives for addressing that issue and gauging the potential impact of alternative courses of action.



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But doesn't this describe all research? Not at all.

A lot of association research is for information gathering—about members, their opinions, their preferences, their intentions, etc. Some of that research is even to understand a specific issue—such as why members do not renew. But a much smaller percentage of association research is specifically directed to identifying how to deal with those issues and evaluating the potential pros and cons of the various alternatives.

It is these last two steps that are the decision-focused difference.

Decision-focused research starts with the end in mind—information to inform discussions about the decisions you are facing. For example:

- We need to decide our position on advocacy issues important to our members.
- We need to decide which products or services can be retired because they are no longer of value to members.
- We need to decide what to pursue from among a potential menu of new product offerings.

Sometimes we need decision-focused research to help solve a specific problem or develop a plan to take advantage of an emerging opportunity. For example:

- How do we respond to the five-year drop in member retention?
- What do we do about the fact that our major competitor is encroaching on a service area we have traditionally dominated?
- New federal programs are expanding the number of people our association could potentially serve. What segments are our best prospects for new membership?
- A membership organization with a smaller but similar membership has made overtures to merge. Should we pursue this option?

In cases where you don't even have enough information to identify the decisions you need to make or problems you need to solve, frame the research purpose based on the outcome. For example, "Based on what we learn about the environment we will develop a hypothesis of the member segments most likely not to renew." Articulating the focus on the essential outcome prevents the research from becoming a general fishing expedition and more clearly directed toward understanding member segments and drivers of renewal. The focus on segments also has important implications on methodology and sample that need to be considered at this very early research planning stage.

The decision-focused research agenda has seven parts:

1. **Background** –
Information relevant to the environment and issues
2. **Purpose** –
Decisions that need to be made
3. **Information requirements** –
Information needed to make those decisions
4. **Methodology** –
How you plan to collect the information
5. **Sample plan** –
Who should participate in the research and in what numbers
6. **Analysis plan** –
Detailed description of how you want the data to be analyzed
7. **Timeline** –
Time frame and milestones for completing the research

Developing the Research Plan

If you think of research as a journey, then the research plan is the roadmap that tells you how to get there. An in-depth research plan sets the direction and course for everything that will follow.

The purpose and information requirements are the most critical part of the research plan because these will determine what is included and, just as important, what is excluded from the research. The methodology will specify whether you need to engage in a survey or in qualitative research, such as focus groups, interviews or ethnography (observation). The sample plan will identify who and how many people you need to complete in the survey. The analysis plan will specify how the researcher will analyze the final data, including what crosstabs or other statistical procedures, such as segmentation, will be performed.

As the road map that will determine where you go with your research, development of the research plan is

one of the most important steps in the research process. This is not a step to shortchange on the project timeline. Depending on your association and the issues and decisions you face, development of the research plan could take a couple of hours. It could just as easily take a couple of months or even more as you identify—and prioritize—the decisions facing the association and consider the information needed to make those decisions. Your researcher should be a part of the research plan discussions, particularly in determining methodology, sample and analysis.

It may be that the development of the research plan uncovers areas of disagreement between board members and/or key staff. That too is an important part of the research process since reaching consensus about the most important decisions facing the association will determine where you will focus time and resources.

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Questions for Developing Decision-Focused Research Plans

- What are the decisions we know we will face in the next two or three years about which we will need to know what members think?
- What is going on in our members' world that will or could have an impact on how our association responds to or serves members?
- What are the threats or potential threats our association faces?
- What are the threats or potential threats our members face?
- What are the opportunities or potential opportunities our association faces?
- What are the opportunities or potential opportunities our members face?
- What assumptions are we operating under that we need to confirm—or reject—in this research?
- What are the trends or activities relevant to our association that we do not fully understand or cannot explain?
- What are our competitors or potential competitors doing? What is their strategic intent?
- What are the “what if” scenarios we need to consider?
- Do we need to test messages or other ideas with our members?
- Do we have the information we need to make decisions about ongoing or proposed programs?
- Do we have a clear picture of who our members are, including the challenges and pain points they face?
- What are the specific, meaningful demographics and purchase/association engagement behaviors of member groups?
- What information do we need about different member groups?
- What are the metrics we want to monitor moving forward?
- Can we complete a SWOT analysis of the association with fact-based information?

Your researcher should be a part of the research plan discussions, particularly in determining methodology, sample and analysis.

It is in the research planning phase that decision-focused research is born.

Decision-focused research starts with the end in mind.

Different Decisions, Different Methodologies

Not everything you need to know can be counted. Many times the development of the research plan will clarify that the research needs to be conducted through—or at least begin with—focus groups, interviews or some other qualitative method rather than a survey. Hybrid research is increasingly common, incorporating both qualitative and quantitative methodologies.

The default methodology for many associations is an online survey. Quantitative research is enticing. The certainty of all those tables and charts helps us feel in control. But many times it is qualitative research that is needed. And using a survey to gather qualitative information will not only create a bad survey, it won't get you the information that you need.

The outcome of qualitative research is not statistical representation. Qualitative research yields richly detailed informa-

tion that provides in-depth understanding of people, their behaviors or ideas. It can be extremely useful in helping to define the problem or opportunity or to suggest potential courses of action. Qualitative research is particularly useful—and often the best methodology—in complicated or complex decision making environments we discussed earlier.

Here are some examples of qualitative research questions:

- How can we create a culture of connection among our members?
- What role should the association have in advocacy issues important to the profession?
- What influences members' level of engagement in association activities?
- How does professional training at the graduate level need to be changed to meet the current demands of industry?

- What impact will a predominately Millennial workforce have on the profession? How will this impact membership?
- If the emergence and growth of nontraditional competitors continues for the next five years, on what do we focus in order to maintain value and earnings capacity?

Often the answer isn't whether to use qualitative or quantitative research methods, but is to use both. Qualitative research is often used as a first step to identify issues and the range of ideas and opinions that will then be tested quantitatively. Qualitative research is used following quantitative research to provide insight into reasons for the results, particularly when the results are unexpected, contradictory or confusing.

Whether you choose qualitative or quantitative research will depend on the nature of the project, the type of information needed, the type of people you are trying to reach and, of course, available resources.



Comparing Qualitative and Quantitative Research

	Qualitative Research	Quantitative Research
Purpose and Objectives	<ul style="list-style-type: none"> • Explore the range of ideas and opinions on a topic • Understand reasons and motivations behind behaviors and opinions • Answer questions about “why” • Provide insights into a topic or problem that can generate ideas that lead to a solution and/or can be tested quantitatively 	<ul style="list-style-type: none"> • Quantify data about a prescribed range of opinions, behaviors or other information • Use methods that represent the population of interest
Sample	<ul style="list-style-type: none"> • May be from very few to a hundred or more, but usually smaller than in quantitative research • Participants are selected from the target population but are not statistically representative of the population 	<ul style="list-style-type: none"> • Sample size depends on the size of the population and the desired level of precision • Participants are usually a random sample of the population or a census, as in the case of most membership research
Methodologies	<ul style="list-style-type: none"> • Traditional focus groups, dyads, triads, in-depth interviews, ethnography, online/bulletin board focus groups and activity-based online activities 	<ul style="list-style-type: none"> • Surveys conducted in person, by telephone, mail, online
Analysis	<ul style="list-style-type: none"> • Non-measurable identification and analysis of issues, themes, attitudes and behaviors 	<ul style="list-style-type: none"> • Statistical analysis that can include subgroup analysis, segmentation, correlation and other advanced analytic methods
Outcome	<ul style="list-style-type: none"> • Exploratory or investigative • Provides a descriptive and detailed account of the research topic • Used to help understand the range of ideas and opinions on a topic 	<ul style="list-style-type: none"> • Numerical data that identifies how much or how many and is representative of the population of interest

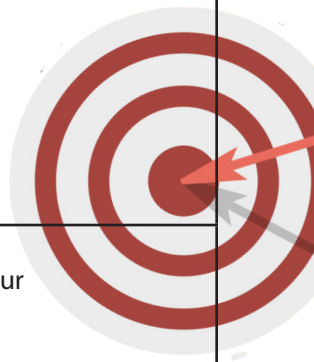


Surveys for Specific Types of Decisions

It helps to see a number of different types of decisions and the types of surveys that can be conducted to provide information for the decision making process. Here are some examples of surveys we have conducted for associations.

Survey Type	Description	Examples of Decisions
Member Value Survey	<ul style="list-style-type: none"> Identify the relative value of specific tangible and intangible reasons for membership 	<ul style="list-style-type: none"> Should we adjust membership dues based on how dues match the perceived value of membership? Are there products and services that we can consider retiring? What do we highlight in our recruiting campaign?
Lapsed Member Survey	<ul style="list-style-type: none"> Identify reasons for non-renewal Identify barriers to renewal 	<ul style="list-style-type: none"> What can we do to retain members? How can we remove barriers to renewal?
Profile and Segmentation Survey	<ul style="list-style-type: none"> Create descriptions of subgroups, including market share. Descriptions may include demographic descriptors, attitude and opinion characteristics, purchase and use behaviors or other variables that create an actionable profile of groups important to the association. Gauge potential opportunities for each segment. 	<ul style="list-style-type: none"> How do we customize our products and services to meet the needs of particular member groups? How can we customize marketing based on preferences and interests? What are the non-member segments with the highest membership potential? How do we reach those groups and what do they want/need?
Attitudes and Expectations Survey	<ul style="list-style-type: none"> Gauge attitudes and expectations Gauge how attitudes and expectations change over time Understand why changes in attitudes and expectations occur and how they impact behaviors and decisions 	<ul style="list-style-type: none"> What should be our priorities given the concerns, problems, desires of our members? How can we best serve our members and customers?
Promotion/Advertising Test	<ul style="list-style-type: none"> Evaluate performance of promotional material or an ad with the target audience Give input to creative team to better understand the target audience 	<ul style="list-style-type: none"> Which advertisement will give us the highest return on investment?

Survey Type	Description	Examples of Decisions
Message Testing Survey	<ul style="list-style-type: none"> Evaluate the impressions and effectiveness of alternative marketing messages directed toward a specific goal Identify weaknesses and strengths of message delivery 	<ul style="list-style-type: none"> What is the best approach to a membership retention campaign? How do we attract non-members to purchase association products and services?
New Product or Service Concept Survey	<ul style="list-style-type: none"> Test prototypes or concepts to identify effectiveness of individual concepts, barriers to reaching product potential Identify product benefits and drawbacks Gauge potential use and product potential Identify market segments with the highest potential. Understand the potential positioning and the competitive environment 	<ul style="list-style-type: none"> Is this a viable product or service to invest in? What is our optimal primary target market? What is our secondary market? What is the product/service potential?
Habits and Use Survey	<ul style="list-style-type: none"> Understand how, when and how often products and services are used Understand how different member/customer segments utilize products and services 	<ul style="list-style-type: none"> Are any of our products under performing and in need of improvement? Can we discontinue any of our products and services?
Pricing Survey	<ul style="list-style-type: none"> Determine demand and optimal pricing. Identify pricing by segment or usage situations 	<ul style="list-style-type: none"> What is the optimal price for a product or service?
Brand Equity and Positioning Survey	<ul style="list-style-type: none"> Identify the brand identity Determine the value the brand holds in the marketplace, including awareness, quality, loyalty Understand the brand position in relation to the competition 	<ul style="list-style-type: none"> How do we differentiate ourselves in the marketplace?
Readership Survey	<ul style="list-style-type: none"> Measure member satisfaction with format, design, content and publication frequency Identify topics of most interest to readers 	<ul style="list-style-type: none"> How can we improve our publications?
Voice of the Customer	<ul style="list-style-type: none"> Gauge customer/member feedback on products and services Identify bottlenecks and problems 	<ul style="list-style-type: none"> How do we maximize profit on products and services? What are the issues that need to be addressed?



To DIY or Not to DIY

Writing survey questions is an art. It takes time and skill to write clearly—and writing clearly is necessary for getting accurate responses from participants. Avoiding ambiguity, leading questions, double-barreled questions, using appropriate scales, fleshing out response options are all a part of what make a good questionnaire.

Online survey software companies make DIY research seem like a great idea. DIY research can be super-fast—and save money too.

It's tempting to just get on with the data collection.

Unfortunately, what these online survey tools don't provide is objective guidance in development of the research plan, selection of the appropriate methodology, sample planning and, of course, the right questions. Furthermore, after the survey a professional researcher will conduct data cleaning, analysis and guidance on reporting conclusions and implications.

Although DIY research can be a good idea in some cases, it's best to be aware of the drawbacks before making the decision between going it on your own or calling in a professional researcher.

Off-Target Data

One of the drawbacks of DIY research is that it usually lacks the methodological rigor employed by professional researchers. A marketing research professional will spend time on the front end of a project discussing the decisions you need to make, the purpose of the survey, specific objectives and the information that you will need.

DIY surveys often end up including a mishmash of all the questions various staff members have been wondering about—whether that information is actionable or not. If a staff member is

charged with conducting a survey it can be difficult to say no to a senior manager who wants to include a few questions about how well the telephone support for the renewal campaign is working or including another manager's few questions about why members aren't posting comments on the new member discussion boards. Aside from drifting from the original purpose of the research, the ever-expanding survey could lead to respondent fatigue—and lower response rates.

Questionable Questions

Writing survey questions is an art. It takes time and skill to write clearly—and writing clearly is necessary for getting accurate responses from participants. Avoiding ambiguity, leading questions, double-barreled questions, using appropriate scales, fleshing out response options are all a part of what make a good questionnaire.

Dirty Data

One of the drawbacks of do-it-yourself research is when it comes to the online data cleaning and validation. Although online DIY tools make it easy to program and field a survey, they are not very good for data cleaning—a necessary step to ensure the data is ready for analysis. Professional researchers use statistical software such as SPSS or SAS for data cleaning and analysis.

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A professional researcher will do several things before running all the reports. These include:

- Excluding responses in which participants completed the survey too quickly. Most survey software tools include timer data that can be downloaded with the data file. Members who completed the survey in two minutes for a survey you expected to take 10 minutes to complete should probably be deleted from the file.
- Exclude responses in which participants obviously straight-lined questions. For example, a participant may go down a whole series of rows in a grid question clicking the same response for each item, even if some of the items were worded positively or negatively or offered as alternatives to one another.
- Delete duplicate responses.
- Reconcile any discrepancies between responses.

Limited Data Analysis

Online survey providers have analytical tools that can provide you with frequencies (topline percentages of individual variables) and crosstabs (analysis of the relationship between two variables). But they cannot do more advanced analytics or even some of the examinations within crosstabs that are needed for many research projects. This type of analysis requires specialized software, such as SAS or SPSS and someone trained on using this sophisticated software.

Short-Changed Report Writing

Marketing research is more than just collecting data. And with the demands of other day-to-day work reporting efforts in DIY are often shortchanged. Any researcher will tell you that a considerable amount of effort goes into pouring over the data, organizing the results in a logical fashion, identifying implications and/or conclusions and documenting all of this into a coherent

report with the supporting data. It is the report that allows all the researcher's hard work to be codified, consolidated and shared with people who will be doing the decision-making and implementation.

Flawed Results

With the potential for off-target data, questionable questionnaires, dirty data and minimal analysis and reporting, DIY does have some drawbacks. Although the DIY option can be the right choice for short, focused surveys on low-stakes topics, working with a professional researcher is probably the right answer for research that will help guide important decisions.

In the end, a professional researcher can provide one thing—reliable results. If the stakes are high, then it's probably best to work with a professional researcher.

The Dangers of DIY

Off-Target Data | Questionable Questions | Dirty Data | Limited Data Analysis
Short-Changed Report Writing | Flawed Results



About Us

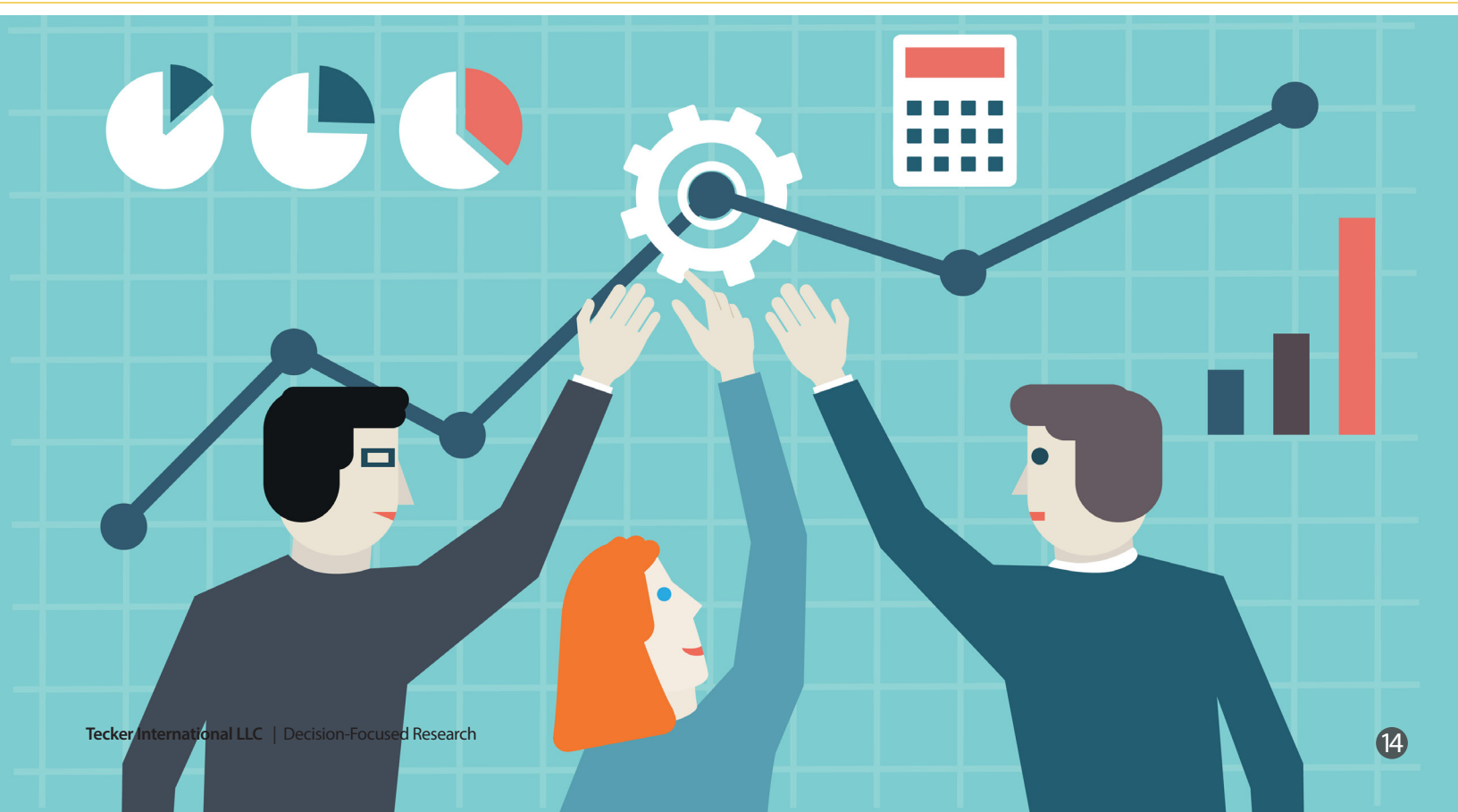
Tecker International (TI) is a consulting firm specializing in assisting organizations with strategic positioning, assessing the environment, connecting vision to operational planning and infrastructure and, ultimately, enhancing future success. TI is known for adapting tools developed within the corporate sector to meet the unique needs of not-for-profit organizations and institutions.

TI has provided consulting services in the areas of research implementation and analysis, strategy development, marketing and infrastructure realignment to more than 2,500 organizations.

Robin Wedewer is a Senior Consultant with Tecker International, LLC, specializing in marketing research. She also works with corporate clients at Wedewer Group, Inc. Robin's work as director of research with a major advertising agency

in the Southeast taught her the value of decision-focused research, which leads to actionable information. She is an ardent advocate of qualitative research and is highly experienced in working with associations on member surveys.

She is a member of QRCA (the Qualitative Research Consultants Association), where she is co-editor of book reviews for that organization's magazine and liaison with the American Marketing Association. She is also a member of the Marketing Research Association, International Association of Facilitators, the Mid-Atlantic Facilitators Network and the American Society of Association Executives.





Contact Us

We would welcome the opportunity to talk with you about your member or other stakeholder research.

Tecker International, LLC
Call 215.493.8120
www.tecker.com
info@tecker.com

or

Robin Wedewer
Senior Consultant
Call 410.414.5718
rwedewer@tecker.com