



***Problem definition and test planning.
What answers are required for a
“best scenario” experiment.***

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INTRODUCTION

- *This presentation will discuss the importance of problem definition and test planning at the start of any project*
- ? *Questions that need to be asked by the researcher*
- ✓ *Using a checklist to guide the planning process*



THE CHECKLIST ✓

- ***Background Information***
- ***Objectives of the research***
 - *Business Objectives*
 - *Research Objectives*
- ***Action Standards***
- ***Methodology***
 - *Consumer Acceptability*
 - *Analytical Sensory*
- ***Resources***
- ***Products***
- ***Deliverables from the research***
- ***Timing***
- ***Budget and Costs***
- ***Responsibilities***
 - *Researcher*
 - *Client*



QUESTIONS AND COMMUNICATION

- *Can you communicate with the person requesting the research?*
 - *Personality*
 - *Time constraints*
 - *Knowledge of the problem*
 - *Knowledge of the research process*
 - *Cross – functional team involvement*
- *To whom are the results directed?*
 - *R&D, Technical, Marketing, Sales?*
 - *What is their understanding of sensory research and the overall research process?*
 - *Are you dealing with the end user of the research?*

THE RESEARCH BRIEF – COFFEE EXAMPLE

- *A QSR client has requested research in order to make the following decisions for their brewed coffee:*
 - *Select an alternative supplier for their brewed coffee – several options*
 - *Benchmark against the in-market leading competitor*
 - *New positioning proposed –different levels of caffeine*





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BACKGROUND INFORMATION

- *Historical*
 - *Past research, product history*
- *Current knowledge*
 - *Sales volume – current & % growth, market share*
 - *Competition,*
 - *Product positioning*
- *Future plans*
 - *New/revised formulation, processing changes, new markets*
- *Purpose of the research*



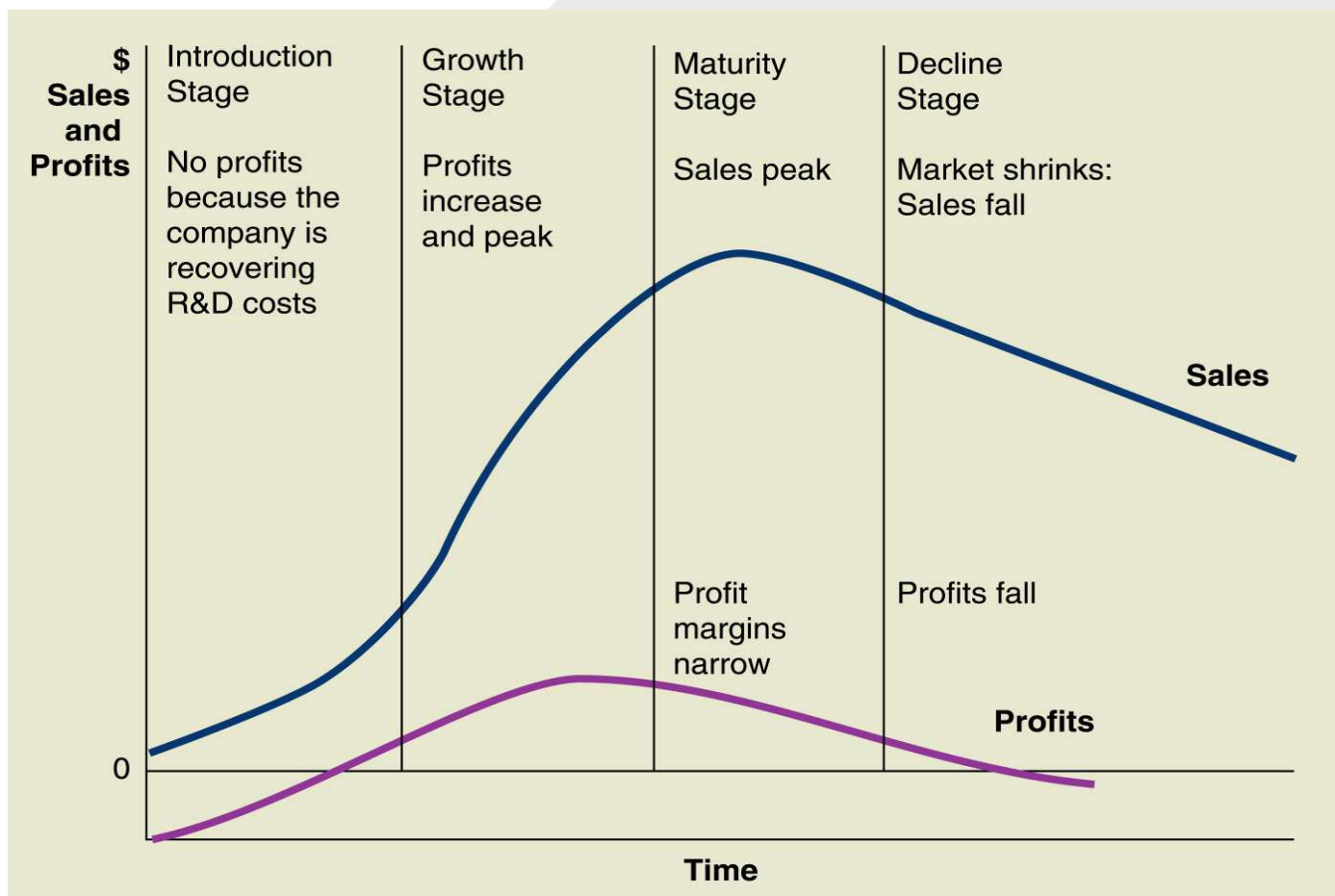
OBJECTIVES OF THE RESEARCH

- ***Business Objectives***
 - *Business decisions that the research findings will affect*
 - *Cost reduction*
 - *Other marketing factors contributing to the need for research*
 - *Quality mandate*
 - *Competitive claim*
 - *Other secondary or tertiary objectives to be addressed*
 - *Benchmark against the competition*



OBJECTIVES OF THE RESEARCH

Objectives can be dependent on the life stage of the product



Screening
Concept/product fit

Product modifications

Competitive assessment

Quality improvement
Healthier product options



OBJECTIVES OF THE RESEARCH

- *Research Objectives*
 - *What questions do you want the research to answer?*
 - *Is a product change noticeable and acceptable?*
 - *What do you want to learn?*
 - *How does our product perform versus competition?*
 - *What decisions will you make with these results?*
 - *Go or No Go decision with product cost reduction*
 - *What specific actions will you take?*
 - *Change quality specifications for the product/ingredient*



ACTION STANDARDS

- *Critical to set clear action standards and get agreement to decision criteria before finalising the research design*
- *A necessity for making decisions from the research results*
- *Need to understand the business risk*
 - *High volume or low volume product*
 - *Missed opportunity if research approach is too conservative*



ACTION STANDARDS - EXAMPLES

- *Define the expectations for the test*
 - *Win over competitor*
 - *No difference between cost reduced formulation & current formulation*
- *What will you do if you do not get the answer you expect?*
 - *Loss to competitor*
 - *Difference between cost reduced formulation & current formulation*

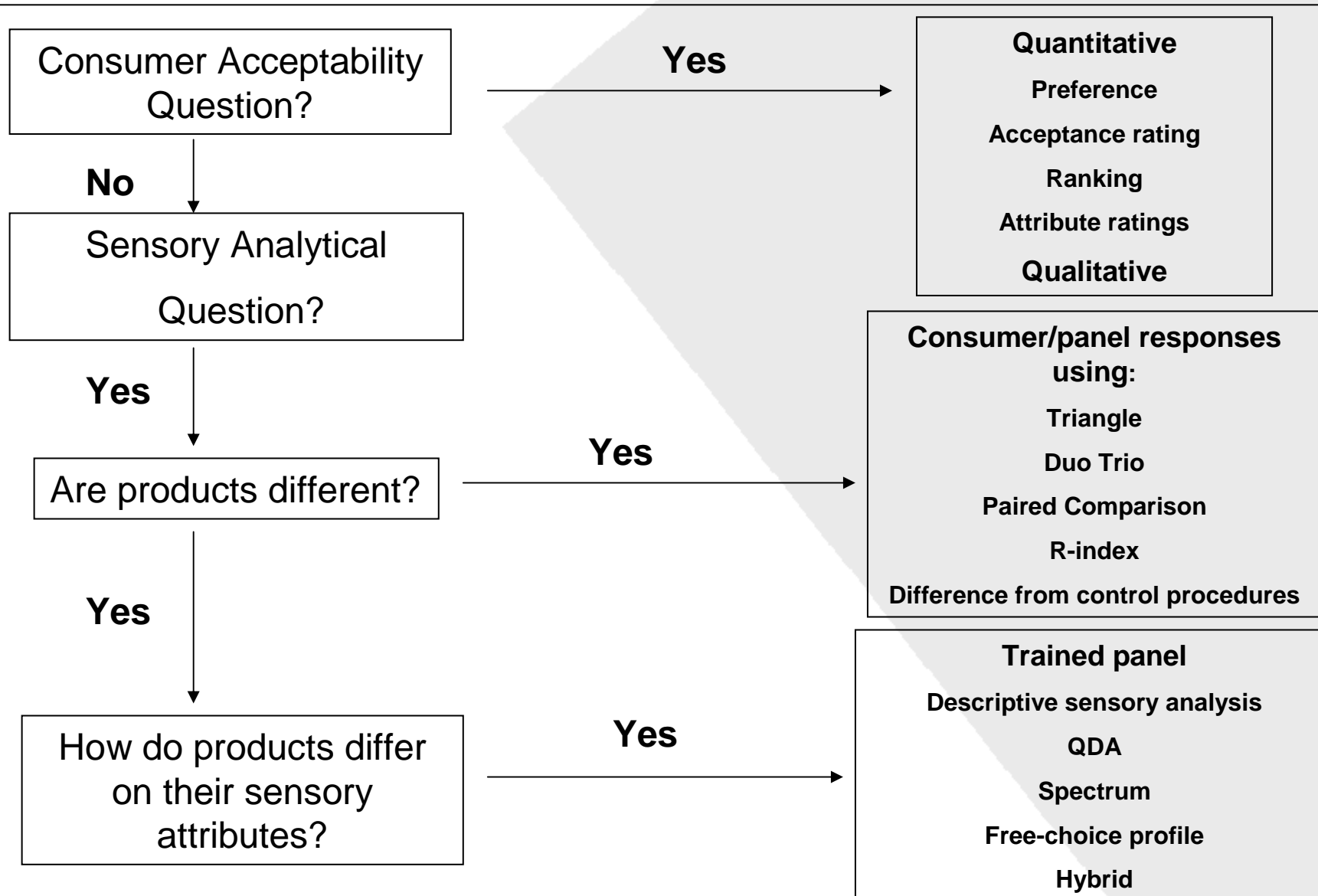
METHODOLOGY

- ***Avoid:***
 - *Pre diagnosis of the problem*
 - *Being told what method to use*
- ***Use the doctor/patient scenario***
 - *Discuss the symptoms*
 - *Examine the evidence*
 - *Diagnose the problem*
 - *Propose the treatment*





METHODOLOGY



- ***Product Context***
 - ***Blind or Unbranded***
 - ***Most rigorous test approach***
 - ***Branded or Identified***
 - ***Brand equity may influence perception of the product***
 - ***Logistical or regulatory issues may dictate branded testing***



- *Location of test*

- *Central Location Testing (CLT)*

- *Immediate use*
 - *Control*
 - *product preparation*
 - *presentation*



- *In-Home Use Testing (IHUT/HUT)*

- *Realistic usage environment*
 - *Extended use*
 - *Response from all household members that use the product*





RESOURCES

- ***Sensory Panels***
 - *Internal*
 - *External (contract)*
 - *Training requirements*
- ***Consumers***
 - *Internal*
 - *External*
 - *Regions*
 - *Countries*
 - *Cross cultural*
- ***Other***
 - *Instrumental measures*
 - *Staffing*



PRODUCTS

- ***Product characteristics***
 - *Few components (beverages) or many (meals)*
 - *One use or a range of applications*
 - *One temperature or both hot and cold preparation*
 - *Ready to eat as is or a component/ingredient*

- ***Preparation***
 - *Carriers*
 - *With or without additives eg coffee, french fries*
 - *Replicating reality eg Food service products*



PRODUCTS

- ***Safety issues***
 - *Micro and chemical testing*
 - *Approved ingredients*

- ***Availability***
 - *Production date*
 - *Bench samples*
 - *Full scale product samples*
 - *Competitor product dates*
 - *Product aging prior to testing*
 - *days or weeks*



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RESEARCH DELIVERABLES

- *Data*
 - *Format: data files, tables*
 - *Analysis*
- *Reporting*
 - *Written report only*
 - *In person, presentation deck*

TIMING

- *Clear understanding of timelines to meet expectations*

<i>Details</i>	<i>Timing</i>
<i>Research proposal approval</i>	<i># days prior to start of research</i>
<i>Panel training/consumer recruiting</i>	<i># days to complete</i>
<i>Ballot/consumer questionnaire approval</i>	<i># days prior to start of research</i>
<i>Product delivery</i>	<i>Minimum # days before research starts</i>
<i>Panel testing/consumer fieldwork</i>	<i># days to complete</i>
<i>Results: Toplines, full data set</i>	<i># days from completion of research</i>
<i>Report</i>	<i># days from completion of research</i>

BUDGET & COSTS

- *Predetermined or for budget planning*
- *Is the discussion with the person who has signing authority*
- *Multiple bids*
- *Costs*
 - *Any shared costs*
 - *internal panel, data analysis, reporting*
 - *Cost breakdown*
 - *Panel training/consumer recruiting*
 - *Fieldwork*
 - *Data analysis*
 - *Report*





RESPONSIBILITIES

Clarify up front who is responsible for all deliverables

- ***Researcher***
 - *Communicate with progress updates throughout the project*
 - *Complete the research on time and on budget*

- ***Client***
 - *Sign off to the proposal*
 - *Product delivery in compliance with specifications and on time for the project*
 - *Ingredient listings*
 - *Concepts*
 - *Authorises payment*

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References

- *Lawless, H.T. & Heymann, H. (1998) Sensory evaluation of food: principles and practices*
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