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**KEY DRIVER ANALYSIS
TECHNIQUE**

The **STRATEGIST
IMPERATIVE**



THE STRATEGIST IMPERATIVE

What it takes to be a strategist in today's research industry

By Mark Wirthlin : President, Heart+Mind Strategies

Marketing research is an incredible business. Those of us who labor over precise surveys and detailed analytics provide the solid facts that propel the decisions of corporations, politicians, nonprofits and all kinds of human organizations around the globe.

The research industry also has what might be the smartest collection of thinkers in the world. Our unusual mix of social scientists and mathematicians can provide a balance between the heart and the head that's often sorely missing in other disciplines. We have a lot to contribute to the health and well-being

of humanity in these turbulent times.

I come from a research family. As a young man, I had the opportunity to view the power of facts and the balance of heart and mind at the highest level of government when my dad was President Ronald Reagan's pollster and chief strategist.

The White House research organization had to be disciplined, fast and correct. Decision-making was often lightning fast and a smart team of Ph.D. statisticians scrutinized the research for every nuance that would help shape decisions.

Along with the all-important data, though, was the need to weigh that data in the context of Reagan's social and political philosophy. This is when I first learned about the importance of the strategist who conducts a kind of alchemy that turns facts into strategic gold. This does not mean altering facts – we are not in the business of fake news – but it does mean developing the ability to think beyond the facts. A big survey with lots of points of analysis results in literally thousands of bits of data. Deciding which bits make a difference in solving the problem at hand is a valuable skill

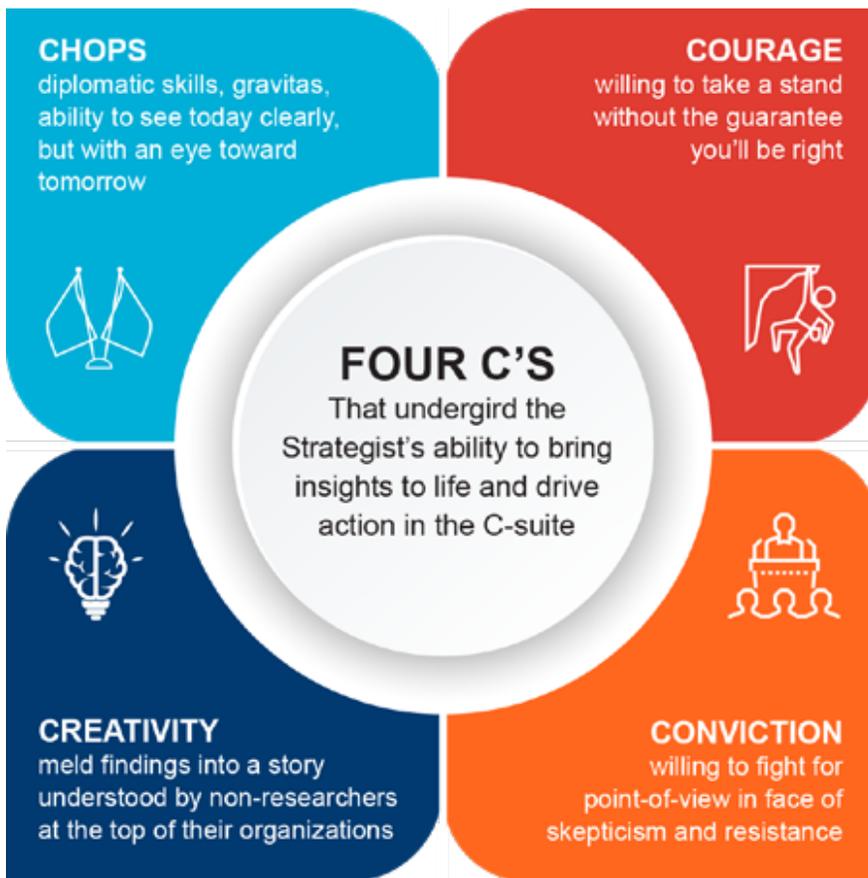
increasingly required of researchers. Gone are the days of one hundred-page reports. However, there is an increasing clamor for strategists who can go a step further to guide the C-suite from insights to action.

There's currently a lot of hand-wringing in the industry about our long-term survival. Will artificial intelligence and big data eventually take over the job of the researcher? How can we sustain our relevance when powerful technological changes seem to threaten our very existence? I maintain that becoming "insights-led" strategists is the key.

Four C's undergird the strategist's ability to bring insights to life and drive action in the C-suite:

Chops – Anyone making action recommendations to senior executives must have a certain amount of "gravitas" to be believed. This includes having a strong general grasp of business and of that client's specific business. It means doing the homework to understand the client's industry, their competition, the specific business problem they're trying to solve. It requires the ability to see today clearly but with an eye toward tomorrow. It also means having the diplomatic skills to understand how (often strong) personalities play into the decision and knowing how to frame the guidance in a way that will make sense to those with differing interests in the organization. This skill set often comes from a combination of hard-won experience and formal education.

Courage – It's a major leap from presenting data and insights to making recommendations for client action and this leap requires a large dose of courage. So, support young, talented people who want to take the risk and move toward a strategist role. Help them understand there is always an element of risk when taking a stand. There's no guarantee you'll always be right



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but you have to have the courage to take a stand anyway. Established strategists also need to be supported and celebrated for the courage they take to their clients every day.

Creativity – The strategist's alchemy comes from applying creativity to the intersection of research insights and broader business knowledge. In the past, researchers have focused more on precision and discipline that ensures we get the data right. That's still critically important. However, we're being called to extend ourselves and to

add creative skills to our toolbox. This can be both scary and exciting for us – to be good strategists, we need to learn how to meld our findings into a story that will be understood by the non-researchers at the top of their organizations. Good strategists are masters of creating that bridge from insights to the very specific actions clients should take. That bridge isn't usually obvious so when approaching the task, great creativity is a must.

Conviction – Related to courage, conviction comes from working

hard to identify the right guidance for the client and then making a strong case for the recommendation. It also means being willing to fight for a point-of-view in the face of skepticism and resistance. That willingness to come in with a strong perspective and make a smart case for how it will benefit the client elevates the strategist to the role of trusted advisor.

Unless we cede all decisions to machines, it is the strategist's unique blend of these skills that results in going beyond understanding human decision-making to organization-changing decisions and actions.

How do we find or grow strategists in our organizations?

In our research organizations, we will always have people who are happiest and most skilled at the disciplines that make for good research. They take pride in crafting a question to get at precisely the answer that's needed. They know the nuances of attitudinal scales. They are expert at interpreting the statistical significance of findings. They like unpacking the meaning in a qualitative interview. Thank goodness for that because this is the work that gives us confidence in the insights we uncover. Insights without these disciplines are a poor foundation for guidance.

So, not everyone feels cut out to leap from insights to client guidance.

However, for those who do, it is important to help them grow their skill set to include the four C's above.

1. Identify a clear career path, complete with the skills to be gained and steps to be taken that will help acquire those skills.
2. Create mindful opportunities for stepping into a broader guidance role, perhaps initially with

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less sophisticated clients and with projects where the stakes are lower. Recognize that you'll need to provide a relatively safe opportunity for them to take the leap.

3. Ensure that a continuous feedback loop provides guidance on their progress along the path.
4. Provide a formal mentor who can provide opportunities for them to observe a strategist in action.
5. Target growth in the size/complexity of the client engagements on which they will take increasing responsibility.

This requires a specific focus on cultivating talent within the organization. To that end, at Heart+Mind Strategies, we have identified a senior member of our team to spearhead the growth of our strategists.

Additionally, we have looked outside the traditional research community, drawing in strategists who have already served this role in advertising/PR firms, consult-

ing firms or client-side roles. They are also valuable to us in the very different perspectives they bring to our core research business. Their inclusion has made our research for clients richer and more comprehensive.

Our clients have been very receptive to the inclusion of strategists in the work we do. They bring a greater depth of understanding to the entire engagement with clients, from the initial project immersion, through the research design and into the critical implementation phases. A side-benefit is that clients appreciate their perspective so much that we are growing our pure consulting business as well. There is no question that strategists elevate our value to clients and bring us ever closer to our desired role as trusted advisors and partners. ☺

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