



INSIGHT MANAGEMENT

A NEW PROFESSION

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September 2013

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1 AN INSIGHT EVOLUTION

The language of “insight” and the emergence of “insight managers” in the business context we now know it, began in about 2002. So how do we come to that date, and how did the terminology come about?

In 2000, we ran an extensive project to look at best practice in managing market research in client organisations. Over 100 companies took part and at that time the market research, database analysis and competitor and market intelligence functions existed in isolation. In 2003, we were asked by many of the same companies to run another project to extend the work. But the big difference was that this time, many had recognised that they needed to bring these functions together. This new combined function needed a name and so ‘insight’ had become the term used. In 2003 it was becoming the norm, and that is why we would date the ‘birth’ of insight to around 2002

Over the last ten years, those disciplines have started working together to address wider business issues; to create ‘joined up’ pictures of what is happening in the market; and to develop creative solutions. Organisations have also increasingly realised that communication skills and the ability to deliver insight to the business are as important, or even more important, as the skills used for gathering and analysing data.

Insight teams now work more closely than ever with stakeholders, and there has been a recognition that information and insight must now be seen as strategic assets of any business that need to be developed and maintained. As a result, the insight management role has continued to develop.

The other side of the coin

So, insight roles and capabilities have developed significantly over the past ten years. However, there is still a long way to go with a range of different issues holding us all back. For instance, an isolated project culture still persists in most teams, with work split up between individuals.

Another problem is that many Insight teams talk about being proactive but still tend to be more reactive. It’s surprising how few Insight teams have a clear overall view of the ‘big picture’ that underpins and gives context to everything they do.

There is also greater pressure on Insight budgets, which has only been made worse by the ongoing economic crisis! Insight teams are having to spend more time getting more value from their existing sources. Other difficulties include time pressures; a ‘service mentality’, with Insight professionals not liking to say “No” to any requests; a lack of commercial awareness (although this is gradually changing); and the endemic and disruptive nature of organisational change.

Birth of the Profession

But the huge potential value of insight, and the need to manage it as a strategic asset, has led to the realisation that insight management is a profession in its own right. To sum up what the insight management profession is all about, consider these two definitions:

Insight is information that can make a difference.

Insight management is about making that information make a difference.

The Insight Management Academy has now been set up to support professional development for those involved in insight management, and from now on the focus will be on continuing to develop best practice in the profession, and in attracting, equipping and supporting the most capable people for the profession.

The rest of this paper, based on a series of articles that appeared in “5-Minute Insights”, discusses the case for insight and insight management, what it actually involves, and then looks at each aspect in more depth.

2 THE CASE FOR INSIGHT AND INSIGHT MANAGEMENT

There is no question that insight and insight management have gone rapidly up board room agendas, with Insight Directors now being appointed at Board level for the first time. But this begs the question “Why?”. Is it just a flash in the pan or current management fashion? Or is it a phenomenon that will continue to grow in importance? We believe that it’s the latter. So let’s look at why.

2.1 THE CASE FOR INSIGHT

There are several reasons why insight has become so important:

Company size

Over the last 50 years, leading companies have reached their optimal size and have largely competed by being hugely efficient - with size being vital for achieving economies of scale. However, the net result is that most are now equally proficient: whenever one takes a lead, the others simply copy and catch up. Consequently, they tend to have similar products and to be equally good. Companies are therefore beginning to realise that a key factor of competitive success is their ability to understand and respond to the markets, especially as these are changing ever more rapidly. Tesco’s innovative introduction of Clubcard in the UK, and the huge advantage it gave them for many years, is a lesson for us all.

Data volume

Insight is also vital due to the sheer volume of data that is available (and that is also needed). As companies become increasingly global, they need to understand consumers in many different countries and cultures. The amount of information that can be gathered and exploited has mushroomed due to technology. It has become impossible for senior executives to base decisions on the information they’ve built up through personal experience. People with

specialist skills are needed to assemble and distil the data and to feed senior executives with the information they really need, in quantities that they can actually handle.

Personnel Turnover

Gone are the days when a director or senior executive spent their whole career in one company, or even one industry. People now change company or even industry as regularly as every two years or so. Although this can bring in fresh ideas, it has a major downside in that longevity allows someone to build up a significant understanding of customers and markets. Every time they move jobs their knowledge goes back to Base 1.

So, information is becoming more vital. However, there is more and more of it whilst those who need it have less and less time to sort through it. That's why every large company now needs a professional Insight team to build, maintain and communicate all of the knowledge needed so that the company can make decisions based upon a comprehensive understanding of the relevant information. This task is only going to get harder and more important in the years ahead.

2.2 THE CASE FOR INSIGHT MANAGEMENT

There are two reasons why Insight Management should be a profession in its own right:

Insight Management is distinct as a discipline.

It isn't covered by any other kind of professional definition, although there are related disciplines such as market research, competitor intelligence and data analytics. These have their own organisations and qualifications, such as the MRS (Market Research Society), SCIP (Society of Competitor Intelligence Professionals) and data qualifications at an academic level or from suppliers such as SAS and SPSS. However, they are all related to the gathering and analysis of data - essentially 'the inputs'. Insight Management is about understanding a company's information needs and then managing the way in which information flows through the organisation so that it has a positive effect. It's about getting the right information to the right people, at the right time and in the right format to drive change. It isn't about production but stakeholder management, issue analysis, journalistic skills and much more.

The benefits of wider recognition. This is important because:

- It adds credibility to the role at senior level, making it easier for Insight managers to influence decisions. For example, if the CEO learns that Insight Management is a recognised profession, he or she is likely to look upon Insight Managers in a different light.
- It provides definitions of capabilities and best practices that will maximise the profession's effectiveness.
- It helps Insight Directors and HR departments with recruitment and grading etc.
- It provides accreditation and career development tools that will raise standards and encourage people to come into (and stay in) the profession.
- It provides motivation by conferring status and awards. This could also affect the desirability of entering the Insight profession - and therefore the provision of university-level training, which in turn would affect recruitment and the quality of insight work.

3 WHAT IS INSIGHT MANAGEMENT?

In the previous section we defined Insight Management as “Making information make a difference”. But what does Insight Management involve and what are the main responsibilities of an Insight Director or Insight team?

Basically, they need to:

- Understand the goals and capabilities of the organisation or community that is being served.
- Identify all types of information that could be relevant in helping that organisation or community to achieve its goals.
- Gather relevant information and make it accessible by establishing efficient, accurate and robust methods for acquiring and storing it.
- Apply sound analytical techniques to that information to identify its implications and to resolve conflicts.
- Use appropriate communication techniques to inform and drive the decisions being made in pursuit of the original goals.

This is quite different from the practices of research, analysis and knowledge management - all of which focus on the third point (and to some extent the fourth).

So what does it actually mean for an Insight team or function? In essence, an Insight Director has to develop the following areas of knowledge, understanding and skills which are then reflected in the 6 modules of the Masters Degree programme:

Core Understanding

Module 1 – Business and Organisational Knowledge and Understanding. This begins with understanding the principles of how organisations work, with special attention paid to such functions as strategy development and marketing, both of which are heavily dependent upon insight. This then lays the ground for a detailed understanding of one's own organization and the markets in which it operates.

Module 2 – Decision Science and Knowledge Management. This covers disciplines such as psychology, neuroscience and behavioural economics, and the way that humans work with information. But then extends to formal and informal techniques and technologies for organising and handling information.

Insight Function Organisation and Ways of Working

Module 3 - Business Engagement Processes and Functional Management. This covers the ways, both formal and informal, to build stakeholder relationships and to ensure full integration into the business and its processes. It then covers how to provide leadership, team development, planning, systems and third party management to support all the necessary activities.

Insight generation processes (at a project and workstream level)

Module 4 - Issue Analysis and Evaluation. To ensure that the work is addressing the real business problem, and gets to causes and not just symptoms. A crucial part of this is the ability to undertake financial evaluation to be sure that the problems are those that address the greatest opportunities and threats.

Module 5 - Insight Generation. This involves the use of the best information sources and analytical techniques, critically must also solve the many problems of bringing together information from many sources – not least the experience spread across the team. A major part, often overlooked, is also the need to build and maintain comprehensive pictures of whole markets or specific product areas, to provide foresight around coming opportunities and threats, and to provide context for all other work.

Module 6 - Insight Delivery and Influence. Finding solutions is of no value if those in the organisation then fail to act. So this area is all about the 4Rs - to ensure that the **R**ight insight reaches the **R**ight people, at the **R**ight time and in the **R**ight format to drive action.

4 BUSINESS KNOWLEDGE AND UNDERSTANDING

The first – and perhaps most important - skill that an Insight team must master is a real understanding of every aspect of the company’s work. This is essential, as your team needs to be a proactive function that helps to drive change. But all of the teams we know struggle with this, as their huge day-to-day demands force them into a more reactive role. Being proactive demands that you have an opinion - and you can't have an opinion without a well-developed understanding of the ‘bigger picture’:

- You have to understand in macro terms what is happening in the market and where the opportunities and threats lie.
- You need a well-developed understanding of business, commercial and marketing principles to know what is and isn’t possible.
- You need sufficient knowledge of your own organisation to know its strengths, weaknesses and constraints - and the barriers that will have to be overcome to make change happen.

This high level understanding should be a priority for an Insight team, so let's look at each of these three areas in a little more detail.

4.1 MARKET UNDERSTANDING

Any new senior executive will want an overview of the markets in which the company operates, its products, market trends, competitors etc. Indeed, this overall picture can be useful throughout the company. **The Insight team should be the first port of call for getting this picture.** So if a new Chairman walked in, could you provide this - without preparation or slides? What kind of picture should you be able to paint? The key elements include:

- Market definitions: in which market(s) are we playing?
- What are our main brands/products and their USPs?
- How big is each in financial terms, and how is this changing?
- How and where do we make our money?
- Who are the main players overall and what are their market shares?
- What are the key customer segments?
- The key issue: where are the main opportunities and threats? This should be the focus of company strategy, and should be the benchmark against which the Insight team takes its proactive role in recommending what work it does.

At a lower level, you should be able to extend this picture with suitable ‘fact packs’ for different products, channels, segments etc.

4.2 COMMERCIAL UNDERSTANDING

An overall understanding of markets in terms of facts, figures and finance is vital but you also need to know how businesses and markets work. A good commercial understanding demands two approaches:

Business education: The most important is a first-class grounding in marketing principles, followed by strategy and strategy development. This widens out to an understanding of all aspects of business, such as sales, manufacturing, distribution, HR. A lot can be achieved by reading a wide range of business books and magazines. The key is to maintain curiosity and to recognise that your work applies to all aspects of business. You have to reach key stakeholders who are experts in different disciplines, so you at least need a basic grounding in all areas so that you can understand their insight needs.

Common sense: A great deal can be achieved by adopting a basic, common sense approach, and a change in mindset. A common misconception amongst those working in large businesses is that big business is difficult to understand. In reality, it's not much different from a small one: it's about understanding who your customers are, what they want and providing products at a price they are willing to pay and which is higher than the cost of providing them. Apparently complicated business problems can often be solved simply by asking basic questions: "If I was a customer, would I prefer our product to our competitors?" or "Does this service actually solve a common problem?" We recommend a Dragon's Den approach. Perhaps the best question when looking at any proposition is: "Will it win us more customers; help us to keep the ones we've got; help us to sell more to them; save us money; or reduce our risks?" If you can't answer, "Yes" to at least one of these, then ask yourself: "Should we be doing this?" If the idea was put to the Dragons Den, would it get ripped apart?

4.3 BUSINESS UNDERSTANDING

You need to understand three key aspects of your own business:

Finance: You need to know how your business makes money, where it makes (and loses) it and how much it makes. The first of these includes items such as the cost of warehousing and stockholding; and how insurance and investment products work (to give an insight into whether consumer behaviour will affect your profits). Understanding all of this is fundamental to understanding how customer behaviour will affect your business. We recommend building a close relationship with a colleague in finance who can explain things in a layman's terms.

Operations: You need to know what your sales force does, how products are made and delivered, how customers are billed and how your customer services work. This includes the implications for customers and how changes in consumer behaviour will affect your costs. You therefore need to take time to visit different parts of the business and to get key stakeholders to talk to you about how they work. As an example, members of the Post Office Insight team spend several days a year working behind the counter in a local branch so that they can understand both the employee's and customer's points of view. Time spent in call centres or delivery vans is also very informative.

Culture and organisation. If you want to make change happen, you need to be aware of who will be affected and, in particular, who might feel threatened. An important part of being an Insight manager is that you also have to be a politician! Along with a wider commercial understanding and an understanding of the markets and environment in which you operate, this will enable you to recognise opportunities and threats and to make recommendations that actually stand up to scrutiny.

5 DECISION SCIENCE AND KNOWLEDGE MANAGEMENT

We would argue that behavioural understanding is the most important area of academic understanding needed to underpin everything we do in Insight Management.

It's essential that we understand how the human brain processes information and makes decisions.

5.1 PROCESSING INFORMATION

Everything an organisation does, and its overall success, is dependent on the decision-making process and the ways in which people handle information. There are three behavioural areas that are crucial to Insight Management:

- **Consumer behaviour.** Everything an organisation does depends upon the decisions made by its customers and users. In the case of a commercial organisation, the crucial decision is the buying decision. If consumers choose not to buy from you, your business will die! It's as simple as that. So, understanding how humans make decisions (and specifically the different roles of emotions and rational thought processes) is fundamental.
- **Organisational behaviour.** Our role in Insight Management is to influence the decisions that our organisations make - at all levels. But those decisions are made by people - so unless we understand how the human brain makes decisions, how can we understand the best way to influence organisational decisions?
- **How we process information.** This applies to consumers, business decision makers and ourselves. The human brain can be both amazingly efficient and appallingly inefficient in the way it processes information. It all depends on the type and volume of information, and on which areas of our brain we use to address it. We have to understand this so that we can work out the best way of communicating with consumers and decisions makers so that they will take on board any information we want to convey. But perhaps more importantly, we need to understand it because processing information is at the very core of our role. For a top athlete, it isn't good enough simply to train - to perform at their best, they also have to understand physiology, diet, sport psychology etc. In the same way, we epitomise true knowledge workers, so if we don't understand how our own brains process information, how can we ever hope to get the best from them?

5.2 BRAIN BASICS

This paper can't go into details about how the brain works. Even those who have devoted their lives to the field of neuroscience and psychology would say that they have only scratched to surface of what there is to learn. This is partly because, until recently, the main way we learnt about how the brain works was to observe the effects when it went wrong (e.g. when someone was hurt, or had a stroke, or had surgery where a part was removed). This is because experimentation on the healthy human brain isn't usually possible. But with the advent of advanced scanning techniques, we can now observe the brain in action in perfectly healthy individuals as well as those with problems.

However, you don't need a degree in mechanical engineering and an understanding of aerodynamics to drive a car. Similarly, you don't need to understand all of the underlying mechanisms of the brain to grasp what it does. So, here is a very brief description of some key things you need to know about the brain:

The System 1 versus System 2 Brain

There's a great book by Daniel Kahneman (who won a Nobel prize for his work) called 'Thinking Fast and Slow'. Essentially, it describes our 'System 1' brain (which we essentially share with animals and which learns entirely through experience) and the 'System 2' brain (which sets us apart from the animals). The latter gives us the ability to think beyond our direct experience and to apply logic and rules so that we can predict the unknown from what we've already learnt.

The key lesson is that the raw power is all in the System 1 brain. It processes the vast amount of information flowing from all of our senses every second, and can make sense of it and use it to predict most of what matters to us. It helps us to jump out of the way of danger, to find what we need to survive, and to do most of our daily activities entirely automatically. However, we devote little of our time to developing and using that capability, whereas almost all of our education revolves around training the System 2 brain and rational thought (which has been revered since the time of Plato and before). But whilst rational thought can do some wonderful things, it is lousy at processing large amounts of information. This is why we often solve many of our problems not by thinking really hard but when we stop thinking and go and do something else. How often have you solved problems whilst mowing the lawn, or in your sleep or having a bath? This is something we have to learn to exploit, even though corporate culture makes that very hard in the workplace.

Left versus Right Brain

People often say that the difference between left and right brain thinking is rational versus emotional. However, the big difference is that the left brain is all about focus and the right brain is all about the big picture. A good, but difficult, book to read on this is 'The Master and His Emmissary' by Iain McGilchrist. Even he acknowledges that physically, most thought processes are shared by the two halves of the brain. But what matters is to recognise the difference in the brain's two roles.

Imagine the humble chicken (not great on the System 2 brain, but a similar System 1 to us and all animals). When it pecks in the dirt to find grains of wheat, it uses its left brain to focus on the task and to pick out the grains from the stones and dirt. However, at the same time it uses its right brain to remain aware of its surroundings and to watch out for the hawk or the fox, or perhaps the farmer bringing more food. We are essentially no different - we focus on the task at hand but we unconsciously continue to take a lot of other information onboard at the same time. Think of holding a job interview: we listen to the answers given by the candidate but spend most of our time picking up the nuances of what is being said and a whole range of visual and other clues that help us to form our view of the applicant.

Decisions are made by our emotions

This isn't just saying that emotions play a role, or that they sometimes affect our decisions. It's our emotions that make our decisions - full stop! That might be hard to accept but it links to the fact that all animals make decisions all of the time and therefore the decision-making

mechanism is embedded in our System 1 brain - and emotions pull all of the levers. Rational processes have an impact by influencing our emotions.

To get to grips with this idea, read 'The Decisive Moment' by Jonah Lehrer. One of his examples is that when choosing something as boring as a mortgage, we might think that we are taking a rational approach. What actually happens is that our emotions make an instant judgement based on feelings such as security and familiarity. But then our rational processes might help us to consider a lesser-known provider (for instance) by providing reassurance based on facts to therefore influence an underlying emotion of insecurity. Issues such as the interest rate, which your system 1 brain doesn't understand, will then also play a major role as your system 2 brain goes to work influencing the basic emotion of loss or gain. But understanding this is crucial, because it's that initial snap judgement that the rational processes have to work on that actually encapsulates what Brand is all about!

5.3 INSIGHT APPLICATIONS OF BEHAVIOURAL UNDERSTANDING

So what are the key implications of these main areas of understanding? There are a huge number - but here are a few tasters that might inspire you to go away and learn more:

- Consumers are time-poor and are constantly bombarded by a vast array of external influences and signals. They have to work efficiently, mostly taking decisions on 'autopilot' - i.e. using the System 1 brain. So, anyone aiming to influence consumer decisions must understand how to cut through the noise or how to become an influential part of it (think Brand) in order to influence their decisions.
- Business decision makers are human. Despite everyone's aspiration to make business decisions on a rational basis, emotions play just as large a role as they do in consumer decisions; it's just that the emotions are different. Ask yourself how often you've seen decisions made in a business context that are based on 'gut instinct' (System 1 again) by someone senior. Or how often has someone junior made a decision based upon not what is right but on what they think they can justify and which won't make them look stupid (and will hopefully improve their promotion prospects)? Basically, it all comes back to emotions. So, if you want decision makers to make the 'right' decision, you have to work out how it can be framed in a way that makes the decision maker feel right about it.
- If you, or a key decision maker, have to deal with a large amount of unfamiliar data, use your System 1 brain. That's what it is good at. Don't force everyone to use their rational System 2 brain to examine a large amount of information in detail. Simply present it in an engaging but largely narrative way but then give them (or yourself) time to absorb it. Let it sink in for a few hours (ideally, overnight) and you'll be amazed just how much has gone in but which your System 1 brain just needs a little time to process. The decisions will be both different and better, and will involve less effort! The old saying: "I need to sleep on it" embodies a fundamental truth about how we deal with information. The only trouble is that only a few organisations understand that and look kindly on people taking a nap at work!

5.4 INFORMATION AND DATA MANAGEMENT

The parallel discipline to understanding how humans process information and make decisions is that of then understanding how to manage the information we gather. It's all about facilitating

the use of knowledge. This seems to fall into three broad categories: personal, process and technology.

Personal

This covers the specific skills we can develop as individuals to help our stakeholders to work with information. Over the years, we've met numerous Insight professionals with some exceptional skills - typically the types that a team needs, although not every member needs them. If you're on your own, you need to develop the skills most appropriate to your situation. Three that stand out are:

- **Specialist team facilitation skills.** A hugely important method for helping to absorb as well as derive information is to bring people together. Workshops and other joint events create a different dynamic in which people may take more time to listen to presentations or other ways of delivering information. But then the processes of questioning and debate can help in three ways. First it can elicit additional information that you might not have realised was available. It can clarify information through questioning and hearing it debated. And it can embed it in the kind of way that storytelling does because a social interaction is far more memorable than a dry presentation or document. As such understanding facilitation processes should be a key part of your armoury – and will be mentioned elsewhere in this paper under insight generation and insight delivery.
- **Personal networking.** Insight Management isn't just about delivering information to colleagues, as they are also often our best source of information. So, a key skill is to build networks of people who can pass information through to you. The best way is to make this a two-way process so that people have an incentive to share. For example, one company provided an answerphone for its sales personnel to ring when they were on the road, if they saw something new that their competitors were doing. This worked because the Insight team issued regular competitor updates that helped the whole team, and always named the source of the information. Gradually, the sales staff started competing to provide information so that they would gain the recognition.
- **Editing.** An editor looks at the overall picture but then picks the right stories to convey a sensible current overview. For example, the Economist has an overall editor who picks out the lead stories. However, each section on the UK, Europe, America, Business, Technology etc. has its own editor who does the same job within that section. A key role of an Insight team is to scan information coming in, to see if it changes what is already broadly known and, if so, to highlight it. Every team should therefore have specialists on key business areas so that whenever a new issue arises, someone already knows the key information before going to look for what is missing.

Process

This includes building the routines and practices that enable knowledge to be retained and used rather than being left and lost. People are more productive when key activities become routine. Here are three areas of information processing that should be considered for some element of standardisation (without building a bureaucracy!):

- **Knowledge sharing.** We all need to learn to share knowledge: a weakness in many teams is that individuals have knowledge that others don't know about. One approach is simply to get together regularly to talk about activities and the things you've learnt. Another is to build a knowledge system or to write short summaries. However, these

systems only work if they become routine and easy to use. One key element is that teams often have regular meetings but all too often these focus on what people are doing and their problems. Instead, you need to make time for sharing what you know and what is new - with the emphasis (as with editing) on focusing on what you didn't know before, or ideas that challenge current thinking.

- **The librarian role.** Whatever systems you use, a major problem is always that of knowing what you've got and where it is. Over the years, the role of the librarian has largely disappeared - but it is invaluable in the world of insight. It involves storing information in a way that makes it easy to find, ranging from file-naming standards and the standard use of folders on shared drives right through to more sophisticated database approaches. It needs to be documented because all too often such systems fall apart when the person who set them up disappears.
- **Categorising and pigeon-holing.** A key adjunct to both knowledge sharing and the librarian role is the idea of having a list of key issues or areas that you know you need to monitor. Asking people to share knowledge begs the question of 'which knowledge?' So, an essential process is that of maintaining a list of key issues and areas on which you want to keep up to date. This means that when viewing an article or a presentation, it becomes much easier to spot useful snippets.

Technology

This is about using the ever-growing range of technical solutions to make things easier and more effective. Technology isn't the answer to managing information but if it's used wisely, it can certainly help. Here are just three areas you should consider as a key part of insight management:

- **An intranet (or a similar browser-based storage system).** This will both support the insight function and also provide a way of making information available to stakeholders. It needs the skills of the librarian to manage its structures and content, and of editors to maintain its access pages and keep the information fresh and relevant. But most of all, it needs to be easy to use and useful. The best systems we've seen are managed in the same way as classic public websites - with usage monitored, click-through rates assessed, the most popular and least popular content understood etc. It also needs to be constantly referenced. A simple but effective way of ensuring that people use it is to avoid sending presentations or documents as email attachments: put them on the intranet, then send the links so that people use the system regularly.
- **Wikis.** These aren't currently well used in the insight (or indeed the corporate) world. However, they are growing in popularity and everyone is familiar with them due to Wikipedia. Basically, wikis provide a simple system that allows a lot of people to contribute to and update a central 'encyclopaedia' of knowledge. If you haven't already looked at them, check them out. SharePoint has a wiki facility. Another that you can buy in, and which we use regularly, is called Confluence.
- **Apps.** With smartphones and tablets becoming ubiquitous, you should try using apps to provide information and to make it truly accessible. One Insight team we know has a superb, tablet-based system that all senior managers now use. It gives them constant up-to-date information from their company dashboard and a whole range of other market-based data. Although these aren't widely used yet, we all need to know about them.

6 BUSINESS ENGAGEMENT AND FUNCTIONAL MANAGEMENT

An essential part of an Insight team's work is to **deliver** information and insight in a way that drives change. But that can't be done in a vacuum or an *ad hoc* fashion. Before delivering individual elements of the overall insight mix, you need to establish some elements of structure. These will give you credibility and will also start to generate the demand and desire for insight that will give you the greatest chance of having an impact.

It's like a farmer ploughing in preparation for sowing. He doesn't just prepare the soil: he first carefully plans which crops will give the greatest yields in different parts of his farm. He then has to operate in an efficient and coordinated manner. Similarly, an Insight team needs a business engagement strategy, and must be managed in an effective way. That requires the following:

- Formal engagement with business processes and structures
- Stakeholder management – to build and maintain all the individual relations that are needed.
- Leadership and management of the team (if there is a whole team) and of the way the function operates – whether you are a team or many or just one.
- Efficient management of any 3rd party relationships and suppliers.

6.1 FORMAL ENGAGEMENT

There are two key, intertwined aspects to the formal side of business engagement: establishing the rules of engagement and governance, and putting a communications plan in place.

The initial communications plan is the basis for negotiating what the Insight team will and won't do for and with the business; for agreeing the rules for changing the plan; and the resources that will be made available. Once these rules of engagement are in place, the plan is finalised and communicated within the business so that everyone knows what will be delivered, when and, most importantly, why.

It's important to stress that this is a **communications plan** rather than a work plan (which goes behind it). Insight isn't actually delivered until it has been communicated. The starting point for the communications plan is the company strategy. The last issue talked about **understanding the business** and building a big picture of the markets in which you operate. That should lead to the development of a close relationship between the Insight and Strategy teams. This is the key to ensuring the complete integration of your work and theirs, so it must be a priority for the team head.

The next step is to build a first draft of the communications plan, based on the main strategic initiatives for the business. This must not only show your understanding of what the business needs but also the value of what you deliver, by effectively asking for each area: "Do you need this information at this stage, or not?" The answer is almost inevitably, "Yes".

This then sets the agenda for engagement between your team and your main stakeholders at the various stages, to ensure that they have what they need, when they need it. It will raise crucial questions of budget and resources but also, if the plan is agreed at high level, the question: “What criteria do we have to meet if someone asks to change this plan?” Most importantly, it will give the Insight team permission to say, “No” when unplanned requests emerge that can’t be shown to be of higher value than the items in the plan. The plan can be changed if the case for these is strong - and it needs some built-in contingency for the unexpected. However, this will send the message that the insight work is essential and is a high-value investment: it isn’t simply an ‘on-demand’ service to be cut when times are tough.

Once the plan is agreed, and the governance established for resource allocation and for changing the plan as and when needed, the next stage is its formal communication to all stakeholders. Again, this will reinforce the high-level value of insight, and will manage their individual expectations. It will also clarify what their input needs to be as part of the process. When you first move away from a more on-demand approach, some stakeholders will be alarmed and disappointed that items they want aren't in the plan, because they haven't engaged with the Insight team as part of the process. Usually, the lesson is quickly learnt and it prompts stakeholders to build insight into their own planning processes so that their future needs go into the communications plan (assuming they are clearly supporting strategic work).

6.2 STAKEHOLDER MANAGEMENT

The formal planning side of engagement typically rests with the team head. But all team members need to establish and manage the relationship with stakeholders on a daily basis. This involves three elements:

Mapping the stakeholders. This will enable you to decide how each relationship should be handled. It should be carried out on the basis of:

1. Their seniority and level of influence
2. Their support for insight and for the team
3. Their frequency of involvement with the team

A map of the main individuals should include influential people within the business who perhaps have no involvement with insight but should have. The map will help you to decide upon the key relationships; how they should be developed and maintained; and who will take lead responsibility for each relationship. This might involve turning influential supporters of the team into champions for the team. Or it could be about managing a key decision maker who could undermine the influence of the team, on a ‘damage limitation’ basis. Or it might be handling someone who has so many dealings with the team that he or she creates a huge workload. The key lesson is that you can't manage all relationships, so you need to understand which to invest time in and the objectives involved.

Understanding the stakeholders’ personalities and needs. Once the key stakeholders have been identified and allocated (assuming you aren’t doing this alone), the next step is to understand them individually. This stage is identical to the process that sales account managers go through with key clients. It’s a simple process of thinking through the person’s responsibilities and KPIs, what keeps them awake at night, and their insight needs. You then

need to look at their personal working style and communication preferences. This will give you an individual profile as a foundation for managing the relationship.

Planning relationships and communications for specific work. The final stage is drawing up a more detailed individual communications plan. This should show **what** you should be communicating, and **how** you should do it for maximum impact. It should take account of the timing of communication as well as the format. Some individuals need time to absorb information and want a lot of detail before making decisions. A straightforward plan for feeding them information in detail before a formal debrief will make the whole process of influencing them much simpler. Other stakeholders will be very decisive and will only want top level information but very clear recommendations. You need to manage their expectations in terms of when they should expect to receive input from you - and then keep it as concise as possible.

In summary, managing business engagement is the same as the way in which sales staff manage key client relationships, as you're selling your output to the business. So, lay firm foundations for the overall relationships and then use simple planning techniques to manage the individual aspects of that engagement. Although this might seem to be an onerous and time-consuming task, it doesn't take as long as you might expect. However, it will save you huge amounts of time in preventing the problems of shifting goalposts and of misunderstandings through poor communication.

6.3 LEADERSHIP AND TEAM MANAGEMENT

The essence of insight management is that it must be a pro-active management of knowledge that drives change, and not just a reactive service.

This requires leadership characteristics and behaviours, even if you're a one-man band - but it becomes crucial where a team is involved.

An Insight Director can't afford to be simply a good manager or administrator: he or she must lead by example. And in larger teams, this applies to all senior executives and not just to the Director.

This level of leadership specifically requires vision and support:

Vision

This includes the credibility and the clout needed to explain your vision both to the team and externally. Everyone should know the role of the team and what each individual can and should contribute. Stakeholders should see the team as invaluable and should know what they should and shouldn't be asking of it. The team should be inspired and driven by a feeling of providing value to the organisation, and should actually have a picture of what the members are jointly trying to achieve.

Support

All teams are confronted by more demands than they can meet. Some respond just by putting their heads down, working all hours and delivering as much as possible. However, well-led teams are supported in knowing when to deflect or turn away work that isn't high priority, so

that they have the time to deliver maximum value in the key areas. They need to know that their leader is behind them and will fight their battles when required.

Other important elements of support include:

Mentoring and knowledge transfer

Insight teams are knowledge workers and experience plays a key role in what we impart. It's therefore vital to have effective knowledge sharing - often through a mentoring or cross-checking process. Two brains are better than one, so it's vital that no-one works in isolation on the main projects.

Mentoring can take two forms. Firstly it can be senior to junior: providing the benefit of experience at the start, middle and end of a piece of work, and helping a junior to learn from their more experienced colleagues. But it can also be peer-to-peer knowledge transfer. If a colleague critiques and questions any piece of work (again at the start, middle and end) this not only provides an alternative view but also avoids the syndrome of: "He can't see the wood for the trees".

Skills and behaviour development.

This includes constantly reviewing team capabilities, providing first-class induction and training to new members, and ensuring that everyone keeps up to date with the latest information. The key thing to remember is that there is so much potential knowledge that no-one can know it all. However, by providing first-class ways of sharing knowledge, skills and behaviours, an individual's knowledge can be maximised. This will make it more likely that even if someone doesn't know something, they might know who to see or where to go to find the answers.

For skills and behaviour, you might be able to get some valuable input from HR, as many organisations now have training and evaluation on desired management behaviours such as collaboration, communication and taking managed risks.

Recruitment.

It's important to ensure that you have the right mix of skills and experience within your team. There are two key elements here:

1. Bring in people from varied backgrounds and with different personal characteristics (e.g. some teams specifically employ people with backgrounds in journalism).
2. Provide administrative and organisational support.

The current business practice is that people don't have secretaries or administrative support. However, one characteristic that we've observed in some of the best teams is that they have a few support staff. These are people who can, for instance:

- Take a PowerPoint presentation that might have great content but lacks impact, and turn it into brilliant output.
- Organise and catalogue material, and run the insight intranet, to ensure that the team has an up-to-date and comprehensive set of resources (the classic 'librarian' role).
- Organise events that bring team members together to share insight.
- Run the back office and make sure that everything works so that the Insight Managers can deliver even when they are under pressure.

6.4 THIRD PARTY MANAGEMENT

As Insight teams develop, they need to devote ever more time to managing their internal relationships, and to help give the time to do that, the best teams are developing ever stronger relationships with their suppliers so that they don't have to spend all their time managing external projects.

So third party management is a fundamental skill within insight management. It avoids the quagmire of mis-communications and unmet expectations and focuses on collaboratively building new knowledge.

One knock-on effect of defining insight management as a profession, and setting standards for it, is that this defines the language used with suppliers. It also helps Procurement departments to understand that insight isn't just about buying interviews and groups. Insight management is about the delivery process. That not only makes demands of suppliers, but also opens up opportunities for them to develop and supply new services.

In terms of the supplier selection process, once you've established what the business needs to know, you can start looking for appropriate partners or specialists to help you to deliver that:

- Engage with Procurement from the start - and manage them so that they understand your needs and help you to build sustainable and effective business relationships with agencies that will benefit your organisation.
- For any brief, draw up a shortlist of no more than three agencies to approach (more than that means that it will take you longer to evaluate the bids). Producing proposals takes time and money, so don't ask for these on a whim - give the agencies a good shot at it.
- Think about the long-term view: are there streams of work that need longer contracts to secure resource and team consistency?

Following these initial steps, review the day-to-day management of selected third parties. This review should focus on:

Clarity: Concentrate on the clarity of every aspect of research and project briefs. The elements that are too frequently omitted from the brief include the level of intellectual input required; the insight management support required; and the working relationship style. Clarify whether or not you want the agency to play a part in the 'so what' and 'what next' aspects. If you do, tell them beforehand that this is what's expected. Get down to the nitty gritty as well:

- Do you have specific templates that you want them to use?
- Do you want them to adopt specific report structuring techniques (such as those in 'The Pyramid Principle by Barbara Minto) or are you happy for them to follow the usual path (background, objectives, methodology, detailed findings etc.) and only then reach the conclusions'?

You also need to provide clarity about how you like to work to ensure that misunderstandings don't creep in. Write a statement or formal agreement that covers the principles of the

relationship; the team and specific personnel requirements; the support required beyond day-to-day projects; the expected understanding of the market; and the business operations and relationship monitoring / review processes.

Openness: This includes transparency in three main areas –

- **The sharing of plans** - Make sure that you do your 'due diligence' first: get the confidentiality agreement in place and verify the steps they must take to ensure confidentiality. Then you can be sure that confidential information can really be shared. The context of any piece of work is fundamental if you want your agencies to contribute fully. Be prepared to share potentially sensitive information.
- **The sharing of results** – This includes all key pieces of research with all key agencies so that you (and they) don't end up replicating work.
- **The use of 'open door' principles** - These give agencies the appropriate and approved access to stakeholders but ensure that you're kept in the loop. Be prepared to manage any difficult situations that arise as a result of stakeholders moving the goalposts or agencies misinterpreting certain issues.
- **Evaluation:** Review their performance at the project and relationship level. This should be a 360 degree review, to encourage all parties to give constructive feedback. This is as much about whether the agency delivered value as whether you met your end of the bargain. Finally, provide feedback and follow up. Acknowledging the agencies' input and tell them what happened as a result of their work and the impact on the organisation. This will increase their morale and will also help them to understand the business better (including tempering their recommendations to the practicalities of the industry within which you operate).

In short, don't shoot each other down in flames: communicate and collaborate!

7 ISSUE ANALYSIS AND EVALUATION

The insight generation process consists of three stages: nailing the real business issue, finding the solution, and finally delivering the result in a way that has real impact.

Of these three elements, nailing the issue is the most important. If you don't get this right, everything that follows could be useless. You therefore need to become adept at issue analysis and evaluation in much the same way that is undertaken by management consultants.

There are many books and courses on consultancy skills, but briefly, in an insight environment the issue can be addressed in two different ways:

Top level questioning.

A great deal of insight work involves questions raised by key stakeholders, who all too often haven't fully thought through the subject before passing it on to you. If you simply respond to their query, it's like a doctor prescribing a remedy for a symptom, rather than taking the time and trouble to address the real source of the problem. Just as the patient might keep returning to the doctor with an array of symptoms, the stakeholder will keep returning with a string of questions which could all have been answered together if they had told you the full story in the first place.

If you simply continue to deliver what you've been asked for, you are always reacting and miss the opportunity to be more proactive and constructive. To use another analogy, it's like peeling an onion. Ask questions to peel off the layers so that you can reach the heart of the issue. Some of the key questions you can pose include:

- What is the real business challenge?
- Why is it a problem?
- What are the options? (Your investigations can then address these and you can offer recommendations rather than just information).

Stakeholders often say that they want their Insight teams to have a greater business understanding. Asking questions like this is a great way to develop that knowledge. To dig a little deeper, ask yourself:

- How big is the issue?
- Does it fit in with any of the organisation's current strategic priorities?
- What is the size of the prize?
- How will your element actually contribute to the decision-making?
- What are the timeframes involved?

All of these issues will give you the ammunition you need either to do a better job or to push the request back if it isn't of a sufficient priority. Continue asking your stakeholder and yourself:

- What do we know already?
- What are our hypotheses?
- Is the proposed work really the best way to proceed?

Face-to-face briefing is preferable to responding remotely to a written request, because it enables you to use questions like this to nail the issue. Don't be afraid to paraphrase back your understanding of the situation and the challenge, to ensure that you really clarify the issue.

In-Depth Analysis.

Sometimes these questions won't get to the heart of the issue because the stakeholder doesn't know the answers. Or perhaps the Insight team has proactively recognised a broad business opportunity or threat but needs to understand it better before starting any kind of detailed work. This is where consultancy skills start to come into play.

Very broadly, there are three approaches when analysing issues:

- **Localisation** – This involves breaking issues down into their constituent parts so that you can get to grips with where the problem is. Is it with all customers or just some; with all services or a few; across the business or just in one region or channel? There are various approaches for breaking it down but visually the easiest way is to use a tree structure, becoming ever more granular until the problem is localised.
- **Valuation** – An assessment of the scale and type of impact in each area. A valuable tool is to always look at the 5 Sources of Value so that you can grasp how large a problem is and how it will impact the business.
- **Driver analysis** – This involves looking at the localised issues and then considering the drivers. These might be a hypothesis (e.g. lower supermarket basket sizes could be driven by changing attitudes to fresh food, or by more hectic lifestyles demanding more flexibility) or logical (e.g. lower profits could be driven by sales or costs; higher costs could be driven by world prices or by poor buying etc.). Again, the use of a tree structure to break down the drivers can be very effective.

The key message in all of this is: **never just do what you're asked because you assume that your stakeholder knows what the real issue is.**

If you haven't nailed it, persist until you do. Otherwise, you risk all of your work being of no value.

8 INSIGHT GENERATION

Insight generation is often seen as the Holy Grail of the information world, with everyone wanting some magic formula for magically generating insight from the ever growing volume of available information. The first stage is the one covered in the previous section – nailing the issue! But once the issue is clear, finding answers typically requires three things:

- A comprehensive knowledge and set of data sources
- Appropriate technical analysis skills
- Asking the right questions
- Working with others

Together they give you the basis to then find the answers.

8.1 COMPREHENSIVE DATA SOURCES

The solution building and applying the full set of sources lies in focusing on the following core elements:

A broad understanding of data sources and methods

Anyone involved in Insight Management must have a clear overview of all data sources and techniques: their pros, cons, timescales and costs, reliability, availability etc. Some analysts might be very familiar with sampling and modelling techniques on a large database but know little or nothing about the difference between qualitative and quantitative research. Many find it hard to understand how conclusions can be drawn from a research sample of a few hundred when they are used to dealing with samples of hundreds of thousands. But equally, a market researcher might know little about the world of competitor and market intelligence, or of classic data analytics. With the emergence of Big Data - delivering data not just on what people buy but how often (e.g. through web analytics) - there will be a raft of new ways of learning about consumers and the market.

Insight management is pivotal to the issue of examining any business issue in depth. Whereas market researchers tend to solve any problem by research, Insight Managers try to find the right information to solve it. They must therefore know about data sources and techniques and must understand exactly what each source can and can't offer, so that they can choose the best way to address business issues.

As a guide, all Insight Managers should have an underlying understanding of five key sources:

- **Market research** - covering qualitative and quantitative techniques as well as the whole array of tools and specialist approaches (from vox pops to ethnography).
- **Data analytics** - database and statistical techniques used in CRM applications, data mining, propensity modelling etc., and the detailed constraints of data protection.
- **Competitor and market intelligence** – ranging from Internet desk research through to Companies House data and specialist industry analysis approaches.
- **Big Data** - an understanding of new sources of data, emerging not just from the Internet (e.g. social media) but also from scanning and monitoring methods (e.g. RFI tagging or the analysis of geographic tracking data).

- **Other basic sources** - such as the sales force, call centre staff, experienced executives in the business, suppliers and intuition!

This understanding can help Insight Managers to find answers to questions much more quickly than through primary research or analysis.

A focus on building data sources

Insight Managers also need to understand how to create new channels of information, and should be seeking to open up new sources. Here are three examples:

- A company built a fast and efficient way of getting competitor information from call centres by establishing a two-way communication channel. The competitor intelligence specialist set up a report mechanism so that if an agent had a call claiming that a competitor was offering something new, they could immediately let him know. The specialist then guaranteed rapid feedback to the call centre about the true competitor offering and how an agent should handle a caller who was trying to use this information to get a better deal. This made the call centre agents lives easier, and the competitor intelligence specialist often heard about new competitor offerings sooner than through normal techniques.
- An Insight team set up a direct dial phone line and answering machine so that sales personnel could call if they spotted their competitors doing anything. For salespeople, this is quicker and easier than email etc. The central team accumulated this information and fed it back to the rest of the sales force. Most importantly, the team always attributed what they had learnt (e.g. “Jim in Halifax let us know xxx. We checked it and here’s the full story”). Salespeople liked the recognition and competed to spot things and feed them through to build their reputations.
- An Insight team built a close relationship with the Complaints team to find out what was going wrong and where. This was much quicker and cheaper than customer satisfaction research!

The resolution of data conflicts

Sometimes different sources of data give different figures. This can be hugely disruptive and can undermine the credibility of Insight teams. For instance, a study of key market dynamics and drivers might deliver a market share figure that doesn’t equate to the known sales. A Commercial Director who doesn’t like the messages is likely to use this difference to discredit the whole research piece – although there might be a perfectly reasonable explanation for it. An Insight Manager therefore has to understand why these differences exist. Classically, they should then take a pragmatic route and focus on figures that are considered as ‘gold standard’ in business (e.g. sales data). At the very least, they need to give a rapid response to any suggestion that one of their sources is wrong because it doesn’t agree with another, to avoid the whole value being dismissed.

The ability to deal with experts

Finally, Insight Managers need to understand how those with different backgrounds see things through different lenses. If they can’t demonstrate a sound understanding of the principles behind all of the different sources of data, it will be very hard to win an argument against an expert. But with that good grounding, the Insight manager can present a comprehensive, multi-

source view without being derailed by a specialist. This often just involves anticipating where differences might emerge.

8.2 ANALYTICAL SKILLS

Increasingly, Insight Managers come from backgrounds other than classic research and analysis ones and rely on others with greater specialisation

8.3 ASKING THE RIGHT QUESTIONS

Although seemingly simple, getting to an answer and understanding depends on asking sensible question of your information.

Do you already know the answer?

This might sound like a daft question! But, as the role of many Insight professionals involves undertaking research and analysis, when they're asked to find the solution to a problem, the automatic response is often to go and do some... research and analysis. This should be the last resort, not the first. Your starting point should always be to say, "If I had to come up with an answer in the next few hours or the next day, what do I think it might be? Or who do I know who might know the answer?" So think of hypotheses and existing sources of knowledge.

Sherlock Holmes once said: "When you have eliminated the impossible, whatever remains, however improbable, must be the truth." Translated into insight terms, that could be: "When you've eliminated the factors that you know about, whatever remains must form your hypothesis."

So, return to the driver analysis we described in our last article on nailing the issue, and eliminate all those that you know are not the problem. What is left then forms the basis of your hypothesis. Perhaps by doing this, you'll realise that you already know the answer!

But if you don't, work on the assumption that either someone has found it in the past, or someone knows it now. Is there any work in your library that has already covered this issue? Or is a colleague or someone else in the business likely to have the answer or could make a good guess at it? Only look at the primary routes once you've first covered these avenues.

If you don't know the answer, where do you look for it?

The first rule of thumb here is to be aware that you're always likely to have a preferred route because of your own experience. If you have a research background, you're likely to start thinking about briefing an agency. If you're a data analyst, your first place to search might be the database. If you're an expert on competitor and market intelligence, you might start by exploring what is happening in the market.

Your stakeholder will probably have come to you with the problem in the first place because they believe that it needs your type of expertise. However, that is always the path of least resistance and is rarely (certainly by itself) likely to be the best. So stand back and ask what sources of information might be the most helpful. Think widely and have a checklist of key sources. As outlined in the previous section these are likely to include:

- Market research companies
- The database
- Competitor or market activity
- Social media
- Internal workshops
- Store visits
- Delivery, Technical or Customer Services staff
- The Complaints department
- The salesforce
- Google
- Your colleagues

What will the answer mean to your organisation?

A solution is no good unless it is effective and practical - and most of all, cost-effective. Apply the insight mantra: "What? So what? Now what?"

Having gathered the evidence from multiple sources, piece it all together to work out what it all means. Resolve any conflicts in the evidence. Build as clear a picture as you can. But then say "So what?". What does it actually mean to the organisation? Is the answer you've identified anything that you can actually influence? Is it actually losing you money? And is the solution more expensive than the problem?

So think again about the **5 Sources of Value**. If your answer doesn't have an impact on at least one of these, should you be recommending action?

8.4 INVOLVE OTHERS

One of the biggest resources we have is our colleagues. Exceptional results and impact can be achieved simply by getting the right people together, sharing, working and possibly competing. They can think of ideas or work through the implications of the data available.

But there also a range of more formal techniques for working together in teams. One example is scenario planning - an often lengthy and resource-hungry technique. However, a large organisation can use it to help in planning for a very unpredictable future, by thinking through what might happen. This involves identifying any signs that might show what the future might be like but also laying plans so that if a specific scenario develops, the company is well-placed to react to it.

War gaming is another technique and, at a broader level the whole area of workshop facilitation can be hugely valuable. Look it up on Google if you want to know more!

9 INSIGHT DELIVERY

Once you've found the answer to an issue, spotted an opportunity or identified a threat, that's **insight**. But to have maximum impact, it needs to be **communicated effectively**.

For those who specialise in analysis or research, the biggest frustration is when the fruits of their labour go nowhere. Perhaps it's a matter of timing: those who should act upon the insight are diverted elsewhere. Perhaps the message is unwelcome or unexciting, so it deliberately gets buried. Perhaps what is obvious to you doesn't ring bells with those who could implement change.

Whatever the reason, the paramount duty of an Insight manager is to take responsibility for the delivery of the insight. If it doesn't lead to change, it isn't acceptable just to say, "Well, I presented the results - if they don't act, it's their fault."

How would your company react if it produced a great product but sales were poor, and the Marketing Director just said "Well, we advertised it. If the customers can't see why our product is better than the competition, that's their fault"?

It would be P45 time!

It isn't enough to produce a great product. It has to be packaged well. It has to be communicated well. It also helps to create a sense of anticipation - ideally, demand should be generated before the product (or insight) even becomes available.

In effect, delivery of insight is a classic case of marketing. There are three key steps involved in making sure that your insight has the best possible chance of influencing the key decision-makers:

Identify your target audience

Don't just accept a brief and assume that the person or team who requested it is the audience. Insight only has impact if it leads to change. So, before you even start a piece of work, think about the possible outcome and the types of decision it might precipitate. Who will the decision-maker be, and who else will contribute or be asked for advice? In terms of the implementation, who will be involved and will need to understand all of the relevant information? Apart from the originator, who else might be interested in the results?

The key is that all of these audiences should be identified at the start, not the end. List them and think through what types of communication might be needed, and at what stage. If you know in advance, it will be much easier to create a sensible set of materials and communication than if you only start to think about it once the results have been produced.

Understand your audience

What motivates your target audience? How can you get them to sit up and take notice? Firstly, beware "The Curse of Knowledge". When you work on a project, you grow very close to it. It can therefore be easy to forget that your audience have their own jobs, pressures and agendas and a completely different view of the world from yours.

Step back and think about what they do, their KPIs and the issues that might keep them awake at night. What style of communication works best for them? For example, some like detail, others loathe it; some want you to be inspirational, others might want you to be practical and down to earth; some need pictures, whilst others prefer statistics. Some need time to digest the information before making a decision, whilst others want everything laid out succinctly so that they can make quick decisions.

This is exactly the same process that a sales account manager uses to understand the different people involved in a sales decision within a major account. It enables him or her to cater for those people's needs on an individual basis.

Tailor your communications

Understanding your audience(s) highlights the fact that one form of communication rarely works for everyone. So, don't assume that your delivery should be a 'one-size-fits-all' presentation to a group. Often, the best delivery will come from a combination of drip-feeding information and a series of one-to-ones before perhaps getting a group together to take a decision.

The key aspects to consider are:

- When should communication start? If some of your audience want a lot of detail (including methodologies etc.), can this be communicated in advance? If there are unwelcome messages, or the results aren't positive, is it worth managing people's expectations and drip-feeding the possible outcomes so that they can think about any decisions they might need to take?
- What type of evidence does your audience need? Apparently, more decisions are based on anecdotes and personal experience than on numerical evidence. So, do you need vox-pops of customers' opinions, or individual customer examples to illustrate a point?
- What are their KPIs? If you know the personal agenda of the decision-makers, frame your results in terms of the impact on those KPIs. The most common targets that decision-makers have to hit are financial. So, if all else fails, show them the financial value of your recommendations and how much it will cost if they don't act.

Develop Your Delivery Skills

Effective delivery requires a range of skills but these can be summarised under the following headings:

- **Structuring.** You need to be able to get quickly to the point and deliver key messages fast so that even if a stakeholder has little time they still get the message. But that needs to be followed by a clearly structured way of supporting those key conclusions with evidence. The most widely used techniques, and one taught in most consultancies, is that based on The Pyramid Principle (a book written by Barbara Minto). There are other approaches but clarity is the key.
- **Storytelling.** The ability to bring information to life by helping people to visualise and engage with a message rather than just see the technical or factual results.
- **Impact Writing.** Applying a journalists skills to communicate key messages quickly in a written document, but then deliver more detail as needed. This skill has become ever

more important in an age where so much is communicated by email. You therefore need to learn how to get your email opened and read when it arrives amongst a hundred others in a day.

- **Presentation Skills.** Although much derided, PowerPoint, and standing and delivering information to a mixed audience, is still one of our most effective communication techniques – if done well. “Death by PowerPoint” is not the fault of PowerPoint, but of the person delivering.
- **Multi-media skills.** We live an age of video and social media. These are increasingly becoming vital as means of communication, and as such need specialist skills to ensure they are used effectively.

Of all the different aspects of Insight Management that we have described so far, the delivery stage is probably the most important. It is also the easiest to improve with minimal cost. It's like marketing: you have to make it personal: you need to take a factual message and somehow make it emotional.

10 THE FUTURE

The discipline of Insight Management (IMA) is in its infancy. We have already mentioned that the Insight Management Academy has been set up to provide professional development support. Quite apart from a comprehensive set of resources, the IMA will provide assessment tools for individuals and teams, as well as a suite of training courses to address all capabilities. It will also provide knowledge sharing facilities and e-learning.

But for those wishing to gain qualifications in the field, the IMA is working jointly with Winchester Business School in the UK to offer a Masters degree in Insight Management. That degree course will start September 2014.

Whatever the profession looks like today, the thing we can be sure of is that it will change as the years go by. So the IMA runs a client Forum and an Agency group to pursue the latest thinking and best practice. And there is already evidence that insight management as a discipline will have far wider application than simply the classic marketing area. Finance generate huge amounts of data but can see that they can create greater value of that data is used more widely. Health services and governments have vast amounts of poorly used data. So the insight management profession looks like it is here to stay, and should expand way beyond its current sphere of influence.