

Conference 2007

Clientside Relationships

The third session on Thursday gave us three quite different case studies, showing how successful outcomes were achieved in three differing but challenging B2B research projects.

The first, 'Making contact with the middle men' written by **Alison Pugh** and presented by **Andy Glazier** of *Consensus*, looked at why intermediaries – such as mortgage brokers and financial advisors – are important. With the withdrawal of sales forces and the mounting complexity and regulation in certain markets, intermediaries are increasingly relied on to provide advice and it is critical to understand how they make their choices. Using a Norwich Union case study, Andy talked about the challenges of researching a small, time-poor and research-resistant universe.

Despite the apparent difficulties, the types of approach which *Consensus* had found worked best were outlined; for example, conducting the interviews face to face, using breakfast meetings and dinners, client participation workshops and providing respondents with a digest of the research.

In 'Balancing theory with reality – an effective practical demonstration of client and agency partnership, flexibility and persistence' **Victoria Riccalton** from *Acritas* and her client **Zoe Willment** from *Lloyd's* then shared their experience of working together on a project which delivered in twenty months rather than the scheduled twelve weeks (and why that was fine!).

Zoe started by explaining how *Lloyd's*, despite many misconceptions, is actually a marketplace for the 46 individual organisations which operate there. It is very paper-based with a complex distribution chain but it is slowly changing and modernising. They identified a need to measure satisfaction from their customers' point of view rather than just measuring the speed with which they managed to get documents out, which was what had been happening previously.

Their case study involved desk research, qualitative and quantitative stages. Zoe stressed the importance of involving an internal project team from the outset who 'owned' the process. The workshop and consultation approach they adopted ensured kept all the stakeholders on board throughout what was a long – and from the sounds of it – often tortuous process. And their willingness to be open in sharing and publishing the research results led to an improved response rate when the survey was repeated in 2006.

Zoe and Victoria summarised the critical success factors as having an integrated client/agency team, an acceptance that the process (and particularly the sample) can't be perfect, a need for persistence, a clear definition of roles and a shared feeling that their loyalty is to the project rather than to two separate organisations.

The third paper of the session was another joint client/agency presentation; 'Tackling climate change in the UK: developing a model to encourage sustainability among local authorities'. **Jennie Abelman** from the *Energy Saving Trust* and **Fiona McAndrew** from *IFF* took us through a very successful project which had provided a segmentation of local authorities.

Jennie first outlined EST's role in helping to fulfil the government's commitment to cut CO2 emissions -a result of the 1997 Kyoto protocol – emissions which are principally caused by the burning of fossil fuels. Whilst most of EST's work is with consumers looking at energy efficiency and sustainable transport, they also deal with Energy Efficiency Best Practice in Housing and Green Vehicle Fleets.

A key influencer in these areas are local councils. They are a major landlord, owning 20% of housing stocks, they run large vehicle fleets, they influence building standards and they are

an intermediary with the public. From the local council's point of view, they can save energy, improve the local environment, improve living standards for their residents – and save money.

Jennie and Fiona discussed the challenges of working with local authorities and the need to produce a segmentation which would allow EST to focus its spend more effectively. As with the Lloyds' project, EST and IFF started with desk research looking at previous work and held a workshop.

In 2005 they were able to get two-thirds of all local authorities to take part and, using a points based system, were able to segregate authorities into high and low motivation, performance and potential. Those with low potential were then not targeted and EST was able to focus on the high motivation segment. The segmentation has been used in many ways and continues to be used, with different approaches adopted for different groups. For example, a personalised promotion sent to local councillors got a 12% response rate and a list of all signatories to the Nottingham Declaration, which was sent to non-signatories, achieved a 22% response. After two years they have managed to move the high motivation segments upwards and fewer are now lagging behind. The segmentation has been used to set internal targets, many of which have been exceeded.

All three papers gave a very useful reminder of how effective research can be when agencies and clients work in depth and in partnership with both sides prepared to be flexible and to invest time in the project.