Writing an effective research brief
A step-by-step guide for success

Writing a research brief that is effective and yields results isn’t always easy. But time invested upfront will pay dividends for the life of your project, and ultimately, might be the difference between reaching your objectives or falling short.

We’ve seen all manner of briefs in our time. Learn from us what works, what doesn’t and how you can ensure your project delivers results.

This guide contains:

- A step-by-step guide to writing a research brief, from idea conception through to brief completion
- Suggestions on the sections you should include and the information to supply in each
- Top tips to ensure research agencies or other bidders understand your needs and can supply a proposal (and ultimately a research project) which delivers on time and on budget

Getting Started

Before you put pen to paper to create the brief it’s important that you’re really clear on what you want to achieve and why.

You should ensure you’ve completed the following actions before you start writing your brief:

- Discuss the research needs thoroughly with all key stakeholders to ensure you understand what they want from the research and why
- Agree a budget, timeline and project deliverables with your procurement team, line manager or senior management team
- Read relevant background material to ensure you have a strong contextual understanding
- Develop a clear rationale for:
  - Why you’re conducting the research
  - The project aims and research questions you’d like to answer
  - How you plan to use the findings
Writing Your Brief: What to Include and Why

As with any report or professional document, creating a clear structure is important to ensure clarity of message and avoid key information being missed.

Over the next few pages we cover the sections that we would expect to see in a research brief and what to include in each.

NB. This may differ depending on your project, so feel free to adjust or amend to meet the needs of your team. This is, after all, aimed at helping you achieve your objectives.

Background Section

This is your opportunity to supply any background information to give contractors context about your organisation and the challenges you’re seeking to overcome through this research.

A background section might include:

- Background information about your organisation, including what you do, for whom and the current challenges you’re facing
- Structure of your team, including information on the insight team (if you have one) and the key stakeholders of the project
- Reference to any relevant policy documentation
- Summary/links to useful previous research

Top Tip: Don’t make this section too long or include too much information. You don’t want to drown important details with information that can be added to the appendix. In addition, you want to leave something for contractors to discover on their own and provide the opportunity for them to demonstrate their knowledge and understanding.

Introduction

This section moves you from the general background information to a specific statement of what you’re commissioning.

You might include:

- Brief outline of what you want to commission and its overall objectives
- Ways in which the findings will be used, to help the reader get a grasp what is needed and timing implications
Aims / Objectives

This is your opportunity to convey to the reader what you want from the project. Your project might have a few overarching aims or objectives which set out what the project ultimately seeks to achieve. Try to avoid including too many objectives, however, otherwise you risk diluting or confusing your priorities, which could lead to your project failing to deliver.

Here are a few examples of project aims:

- Assess the impact of…
- Recommendations of improvements for…
- Examine views of…
- Evaluate the success of…

Top tip: Make sure you don’t confuse aims and outputs. For example, producing a report is not an aim, it is an output.

Research Questions

Here you should include the key questions you want to address to support you in meeting the aims of the research.

For example, if the project aim is to assess the impact of an intervention, your research questions might include:

- Who did the intervention target?
- What did the project deliver?
- What elements were successful, and why?
- What were the main enablers and barriers?

Issues / Risks

While you’ll want bidders to specify the risks they envision, this is your opportunity to clarify any concerns from your perspective. There may be particular questions that you want answered by contractors, risks you’d like them to investigate or address, or just issues to flag to ensure the success of your project. It’s worth noting anything you believe will add time or complexity to the research, or prevent you from achieving your objectives.

For example:

- Poor response rates
- Complexities in compiling a sample
- Sensitivity of some stakeholders to the results
Methodology

The extent to which you want to specify a method will vary from project to project. There is a trade-off between saying exactly what you want, thereby limiting new ideas or original thinking, and being less prescriptive, thus allowing room for creativity but risking not getting what you want or getting proposals on a scale which you cannot resource.

Generally, it is useful to allow those invited to tender some scope to develop the methodology they propose to use. Exceptions might be where previous work must be precisely replicated or where commitments have been made to stakeholders.

Consider:

- Primary vs secondary research
- Quantitative vs qualitative research
- Sampling details
- Geographical coverage
- Methods you either really want or do not want
- Anticipated challenges
- What you can provide, eg. access to sample/customers/employees, existing research that might help
- Types of analysis required

Top tip: Make sure you give sufficient guidance to avoid something essential being missed and to allow those tendering to get the idea of the size and scope of the project so they can cost it properly.
Timing and Outputs

It’s important to set expectations around timelines and deliverables required. As a minimum you’ll want to include the start and end dates of the project. But you should also include:

- The timetable for procurement, including key dates for when tenders are due, the method of submission and tender presentation dates (if planned)
- When you expect each output, for example, the draft report, the final report and any presentations required
- Any project milestones you want included to keep the project on track
- Any internal milestones influencing the timeline
- Requirements on the format of the report. This might include a report template and/or style guideline to be adhered to

**Top tip:** Don’t underestimate the time and resource needed to run a procurement exercise. Make sure your evaluators are available when you need them and have sufficient time blocked out in their diary.

**Top tip:** You will nearly always want a draft report to review and comment on in advance of a final report. Make sure you allow sufficient time between the two to get comments from anyone who needs to be consulted, and to allow the contractor to revise the report.

It’s important to specify all the outputs you’ll need so bidders can cost for them. Some to consider:

- Research tools – eg. topic guides, questionnaires etc.
- Interim outputs – eg. progress statements, interim reports, report of a pilot, report plan
- Underlying data /tools used as part of project
- Presentation of findings
- Involvement in any further dissemination or training - eg. Conferences or workshops

**Top tip:** You will generally be charged for each output, so avoid the temptation to ask for a long list of outputs which aren’t essential. An interim report might be overkill, for example, during a relatively short project.
Staffing

This is your opportunity to specify the expertise which you think the eventual contractor should have and ask them to demonstrate this.

Remember to ask for:

- Relevant experience of the staff to be involved in the project
- An explanation of the role and responsibilities of all staff who are proposed for the project
- A statement of how many days they will spend on the work
- Full details of the experience and roles of any sub-contractors to be used on the project

Project Management

Here you should note anything which will have cost implications and give an overview of how the project will be managed by your team.

Consider, for example:

- Requirements for regular project updates
- How many face-to-face meetings they will be expected to attend and the likely location
- Acknowledging that ad hoc meetings may be necessary from time to time
- Noting any unusually complex management arrangements – eg. inclusion of multiple departments or stakeholders with a vested interest

Costs

You should provide an indication of your budget to enable bidders to create a realistic proposal that meets your expectations, prevent additional follow up questions and prevent over-bidding.

To allow you to compare tenders effectively you might want to provide headers for itemised costs, or include a spreadsheet template, including items such as:

- Project management and professional time
- Fieldwork
- Sample purchase
- Travel and subsistence
- VAT (if chargeable)

So there you have it. All the information and tips you need to create a well written and informative brief. Get the specification right and you will save a lot of time and money. And, most importantly, the project will successfully deliver on its objectives.

To find out more about IFF Research or to discuss a research project

020 7250 3035  info@iffresearch.com  www.iffresearch.com