# CLIENT CHECKLIST

**Wondering whether one of your agency clients or prospects is a good fit for an Audience Audit? Here's a short checklist that can help.**

**Checklist:**

- ☐ Can we reach your client's audience with a survey?
- ☐ Is their audience large enough for this research?
- ☐ Does limited geography affect our ability to reach enough respondents?
- ☐ Are they engaged in marketing activities that could benefit from the research?
- ☐ Do they have an email database of customers or prospects?
- ☐ Can they accommodate the research fees in their budget?
- ☐ Can they accommodate the associated agency fees?
- ☐ Will they need to plan for additional respondent fees?
- ☐ Do they have sufficient budget to pursue other marketing activities once the research is done?
- ☐ Will the research timeline meet their needs?
- ☐ Are they willing to hear and accept findings that may not agree with their own assumptions about their audiences?
- ☐ Are they ready and willing to incorporate the research into their marketing activities?
- ☐ How can Audience Audit help you plan and sell a client project?

**Read on for more insight into why these questions are so important when considering a project with us.**

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# CLIENT CHECKLIST

**Familiarizing yourself with the questions discussed below can help you determine if your client is a good fit for an Audience Audit.**

## COMPANY CHARACTERISTICS

### WHO is their audience?

We conduct attitudinal segmentation projects for organizations of all types — B2B, B2C, education, not-for-profit, multi-national and locally-owned.

Each type of organization brings different considerations. B2B organizations, for example, often have smaller target audiences that can be more challenging (and costly) to engage in research.

We can often access the respondents they need even if they don't have a database of target audience members, but we should discuss to ensure we feel confident about reaching their audience before you pitch the research.

### How LARGE is their audience?

We conduct quantitative research with the goal of providing statistically reliable insights to drive your client's marketing activities. To provide reliable guidance, we typically seek a respondent group of at least 300-400 participants.

While we can sometimes provide helpful insights with a smaller group (particularly if the universe of potential customers is fairly small, and we can gain feedback from a large percentage of that group), we don't want to get your client excited about research without being confident that we can offer statistically valid findings.

A good rule of thumb is to consider that we might gain completed responses from 5% of quality email list of current customers — so if your client doesn't have a list, or has a small list, we should discuss other respondent sources before proposing the work.

### WHERE is their audience?

Clients operating in a very small geography (such as in a single town or a short list of zip codes) often have difficulty sourcing enough respondents to make quantitive research like ours worth pursuing.

Panel providers often have limited ability to source a large number of respondents within a tight geography, unless the target is very general and has high penetration — such as consumers who shop at a big-box store, or buy dish soap, or eat pizza at least once a week, for example.

If your client has a relatively small geographical footprint, it's best to chat so we can feel confident about respondent sourcing before you discuss the research with them.

We can secure respondents in the U.S. or internationally, and can implement surveys in languages other than English for an additional fee.

## MARKETING ACTIVITY

### Which marketing activities are they using or considering?

The research will ultimately be of value only if it's used to develop or improve marketing — that's why we do what we do. If your client doesn't anticipate doing any marketing in the next year or two, we'd recommend waiting until they're closer to that point before they pursue audience research.

If they ARE doing marketing, some of their efforts can be made considerably more effective and efficient with the benefit of attitudinal segmentation insights:

- **Website development** is much easier when it's clear which audiences are the best targets, which challenges are the most pressing for them, and which content they most value;
- **Content marketing** becomes much more efficient when the attitudes, needs, challenges and preferences of each audience are detailed in the research;
- **Email marketing** is much more strategic when particular segments are targeted with relevant content;
- **Marketing automation** is designed to achieve tremendous benefits from engaging with specific segments based on their needs and preferences, but clients often lack the segment-based insights necessary to utilize the software's full range of capabilities.

### Do they have an email database?

We conduct our research for a flat fee — meaning that your client is not charged on a per-respondent basis for any respondents that you and your client can source through your own resources.

If your client does not have an email database, respondents can be sourced through other means — from a professional panel provider, for example, or through online ads targeted at the appropriate group — but these will add costs which will be passed along to your client.

If we can source respondents using your client's email database and partner relationships alone, our flat fee (plus a small amount for the sweepstakes prize) is the only cost they'll incur.

## BUDGET AND TIMING

### Research fees

Can your client's budget accommodate research fees around $20,000? If not, our solution probably isn't a fit for them at this time. While every project is fully custom and will be priced individually, you should expect research fees in this range, including the costs associated with your agency's participation in the process (see "Agency compensation" below).

### Agency compensation

You and your agency are key participants in this process. You will manage the interaction with the client, provide input during the survey development process, and participate in two results workshops — one to review the results with your agency team, and another to share them with your client.

In addition, you may be designing email invitations, strategizing and executing social media campaigns or placing ads to reach potential respondents. You should ensure that your efforts during this process are appropriately budgeted.

### Respondent fees

If your client doesn't have an email database, or is interested in the views of participants outside of their current customer base, additional fees will typically be necessary to secure appropriate respondents through a professional panel provider.

### Marketing budget

It doesn't make sense to spend money on research and have nothing left to actually develop and implement the marketing programs based on its findings.

### Timing

An Audience Audit project typically takes roughly 10 weeks to complete, from the first meeting to the final results workshop:

- 4-5 weeks for survey development
- 2-3 weeks of data collection
- 3-4 weeks of analysis and visualization
- 1 week during which we share the results you and your client

Timing will, of course, depend on the responsiveness of the client in providing feedback and approvals during the process.

Virtually all of our clients continue their existing marketing and other initiatives while we're conducting the research, and will then incorporate the findings into their go-forward programs once the results are available.

We are always happy to accommodate any specific timeline targets as best we can. However, we're unlikely to be able to accommodate timeframes shorter than 8 weeks.

## DATA FRIENDLY

### Open-minded

Your client undoubtedly has existing opinions about the needs of their target audiences. They may even already have ideas about their audience segments. It would be surprising to find a client that didn't.

Part of our work is to determine whether these assumptions are true — or not. While our results typically validate some aspects of your client's perceptions of their audience, we also often find results that defy your client's expectations — and even your agency's.

Our job, as your research partner, is to find the truth in the data we collect. We will report what we find without judgment. Our job is not to tell you or your client what to do with the information we find — marketing strategy is in your hands, not ours.

But as the messenger, sometimes we are forced to deliver news that isn't comfortable to hear. As long as you and your client are comfortable with that, we'll work well together.

### Ready to Use the Data

Are you and your client prepared to use the data to develop marketing initiatives? Nothing is more frustrating — for us, for you and for your client — than to spend time, effort and budget resources on an initiative that doesn't get utilized.

Let's make sure before we start that everyone is ready to find out what's most important to your client's best audiences, and use that information to build more effective marketing programs.

## NEXT STEPS

### Let's chat!

If you believe you have a likely candidate for our research approach, we welcome the opportunity to get on the phone and discuss any questions you have. We can show you some examples of the work, discuss respondent options and get everything we need to provide you a customized proposal.

### Client Q&A

We are also happy to set up a screen share discussion with you and your client to discuss the work, share examples and answer their questions as part of your proposal process. We're here to support your efforts to support your work with ours in any way we can.

### Contact us

We look forward to discussing how our work can be of service to your agency, and to your clients. Let us know how we can help!

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