

# Implementing Enterprise-wide Research Strategy

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Creating a Successful System for Providing  
Ongoing, Objective Information to Support  
Association Business Strategy

Executive Summary .....	2
Key Benefits of Enterprise-wide Research Strategy .....	3
Research: Imperative for Good Decisions.....	4
Are decisions strategic or tactical? .....	4
What is the decision-making horizon of decisions?.....	5
Implementing Enterprise-wide Research Strategy.....	6
Creation of Research Business Plan .....	6
Creation of Integrated Research Infrastructure .....	6
Orientation and Integration of Association Laboratory Staff .....	7
Unique Benefits of Association Laboratory as Research Provider .....	8
Association Expertise .....	8
Creativity and Insight.....	8
Full Service Research Capabilities.....	8
Client Service.....	9
About the author:.....	9

## **Executive Summary**

Many associations suffer from a lack of objective information to make decisions. This lack of information often results in too much “politics” where valid differences in opinions among both volunteers and staff can not be effectively resolved. A lack of independent analysis compounds the problem. The result is the creation of poorly coordinated strategy that fails to take full advantage of the assets and opportunities of the association.

By implementing an enterprise-wide research strategy in cooperation with Association Laboratory, associations can improve the value of their data and the quality of their decisions. Enterprise-wide research strategy creates a customized, ongoing process for the integrated collection of all association membership and marketing research. This research process is specifically designed to provide timely, objective information and independent analysis to both staff and volunteer leaders.

To implement an enterprise-wide research strategy, Association Laboratory works with staff to create a Research Business Plan identifying what decisions need to be made, who makes these decisions and what information (and thus research) is necessary to support these decisions.

Based on the Research Business Plan, Association Laboratory creates a research infrastructure to integrate existing data collection and implement new primary research as needed.

The analysis and use of the information for decisions is supported by the research staff of Association Laboratory throughout the year through participation in committee and staff meetings and customized reports.

Association Laboratory is a nationally recognized, award-winning company specializing in the research and development of association business strategy. The combination of the company’s research expertise and in-depth experience with associations of all sizes and types uniquely qualifies Association Laboratory to be a preferred provider of enterprise-wide research solutions.

## Key Benefits of Enterprise-wide Research Strategy

Implementing an enterprise-wide research strategy is a relatively innovative concept pursued by forward-thinking associations committed to improving their organization's performance.

The enterprise-wide research strategy provides some of the following key benefits to the association:

The creation of a comprehensive, integrated research infrastructure provides ongoing information and insight to staff and volunteer leaders.

All potential sources of information, both internal and external, are identified and coordinated so that data collection and analysis is maximized while wasteful expenditures are reduced.

The addition of independent insight and creativity into your strategy discussions from an outsider's perspective improves analysis and understanding.

Too often volunteer leaders and staff are too close to problems to identify potential new solutions. An independent provider of research services and data has no political or other institutional bias. The provider looks at your problems with a fresh eye to help you identify the best solutions to your unique challenges.

The management of primary research for long-term, ongoing tracking increases the value of information by constantly re-validating conclusions, tracking trends and identifying emerging issues.

The value of research data increases as information is collected over time and compared to past results. The additional data allows the association to confirm earlier conclusions, track changes in opinions over time and identify both challenges and opportunities more quickly.

The efficiency of internal decision-making is improved by reducing politics.

The word "politics" is too often used to describe valid differences in opinions among people that can not be confirmed or resolved in fact. An integrated research strategy provides objective data so that legitimate differences in opinion over strategic direction can be quickly identified, discussed and resolved.

Existing staff can devote more time to program execution and member service.

Research is highly specialized and even a small study requires several different skill-sets. By developing a strategic relationship to conduct research with Association Laboratory, the association removes the operational burden of research from existing staff so that they can concentrate fully on how best to apply the information to meet the challenges of the association.

## Research: Imperative for Good Decisions

The goal of research is to provide specific information to address unique decision-making needs.

Two questions are important when developing research strategy.

- Are decisions strategic or tactical?
- What is the decision-making horizon of decisions?

By understanding the answers to these two questions, the association can develop a specific plan and infrastructure to collect and analyze data that is useful for decisions, not just interesting to participants.

### **Are decisions strategic or tactical?**

Different groups within the association have different roles and responsibilities. Each group needs information for different types of decisions.

There are three main groups involved in decision-making.

- Volunteer leadership groups (ex: Board of Directors)
- Staff/volunteer leader combinations (ex: Chapter or Education Committee)
- Staff groups (staff meeting or conference marketing meeting)

Information at its most strategic level regarding the association's membership and the member environment is necessary to support *Board level decisions* on organizational strategy. This information needs to be future-focused and predictive in nature.

For *staff/volunteer groups*, information must be provided to help these groups make decisions within their area of influence for example chapter development, conference education or member marketing activities. Segmentation information identifying differences between important audiences is critical to these groups.

*Staff directed groups* need tactical information to guide execution of programs and services by improving the configuration and marketing of these efforts. Diagnostic information and analysis is important to these groups.

By understanding the strategic vs. tactical nature of decisions, the association can properly assess the level of research investment that is justified in supporting these decisions.

## **What is the decision-making horizon of decisions?**

Some decisions are made on an immediate basis while others are considered over a long timeframe. For planning purposes, three general timeframes may be used.

- Long term – greater than 1 year
- Annual
- Short term – less than 1 year

*Long term decisions* relate to the ongoing assessment of the membership and other markets and the use of this information to guide the evolution of the association over time to serve these markets. Leadership must anticipate how environmental factors will affect members 3 - 5 years or more in the future.

*Annual decisions* relate to the necessary planning and implementation of the association's programs and services each year, for example budget development or the Annual Meeting. These decisions are predictable and important to effective allocation of resources.

Finally, *short term decisions* take place at the committee or staff level and guide the direct implementation of association programs and services. Staff needs specific information relevant to these decisions in an ongoing manner.

By understanding the timeframe of decisions, the specific tactics for data collection and analysis can be established to ensure that information is available when the decisions are being made.

## **Implementing Enterprise-wide Research Strategy**

Successful strategic research outsourcing involves three key steps.

1. The development of a Research Business Plan guiding the creation of a research infrastructure and all subsequent research activities.
2. The creation of a structure for the ongoing collection of research data. This structure may include surveys, conference evaluation data, focus groups, data-mining, etc. The research tools are customized to the research needs and the entire system is designed to provide the data for analysis.
3. The participation of Association Laboratory staff in the research and decision-making processes of your association so that objective analysis and the creative insight gained through interaction with many different industries and professions can be incorporated into strategy decisions.

### **Creation of Research Business Plan**

The first step in implementing an enterprise-wide research strategy is to develop a Research Business Plan for the association. This plan outlines a clear plan of action for the collection, analysis and reporting of information to staff and volunteer decision-makers.

The Research Business Plan accomplishes the following:

- Articulates the goals of the research strategy so that implementation of research activities directly supports these goals.
- Identifies the specific decision-making bodies and their information needs.
- Identifies the specific types of information necessary to support decisions.
- Outlines the budget, timeframe and staff needs for the creation and ongoing management of the research function.

The Research Business Plan acts as a blueprint guiding the collection, analysis and use of research information throughout the year.

### **Creation of Integrated Research Infrastructure**

Based on the Research Business Plan, Association Laboratory creates a program of primary and secondary research for the collection, analysis and reporting of information to volunteer leaders and staff.

The following steps are important to implementation:

- A schedule of key meetings or other times when specific types of data or analysis is created based on the association's annual operating plan.

- The coordination of existing, internal data collection activities of the association, for example, conference evaluations, so that the efficiency and effectiveness of existing activities is maximized.
- The implementation of new primary research projects as needed to add additional information for decisions based on the Research Business Plan.

This step results in the efficient, ongoing collection and presentation of data to meet the goals outlined in the Research Business Plan.

### **Orientation and Integration of Association Laboratory Staff**

A final component of the enterprise-wide research strategy is the participation of Association Laboratory staff in the decisions and discussions of the association. This provides several benefits:

- The inclusion of objective, experienced analysis of research data.
- The addition of independent insight into the challenges and opportunities of the association.
- The addition of new ideas and strategies learned through interaction with other association clients.
- The support of current association staff so that they can focus more aggressively on program implementation and member service.

These decision-support services ensure that the association receives the maximum, ongoing value from the organization's research investment and that staff have access to insight and ideas to meet their programmatic responsibilities and timeframes.

## **Unique Benefits of Association Laboratory as Research Provider**

### **Association Expertise**

To conduct successful research, the company must not only be familiar with the collection of data, but the use of information for the specific needs of associations.

Association Laboratory works exclusively with associations. We understand the unique dynamic between your volunteer leadership and members. We respect your unique role and use this knowledge to provide useful, effective services.

Association Laboratory staff includes seasoned association executives. These individuals have been responsible for nearly every aspect of association management including executive management, government affairs, conventions/meetings, membership marketing, professional development and industry promotion. Their experience includes advertising, publicity, direct marketing and online media.

### **Creativity and Insight**

Many companies can provide you with lengthy lists of tables and graphs. Association Laboratory specializes in providing insight and creative recommendations gleaned from our work with dozens of different industries and professions. Association Laboratory provides you with independent, objective and in-depth recommendations.

Association Laboratory staff has successfully developed organizational, marketing, product and delivery strategy for both association and for-profit enterprises. Our experience includes start-up, rapidly growing and mature businesses. This experience helps us develop recommendations that can be implemented within your existing staff and financial capabilities.

Your organization benefits from our experience with dozens of trade and professional societies. This comprehensive knowledge improves the quality of our analysis and gives us experience in what works and doesn't work for associations. At Association Laboratory we provide you with our insight and recommendations not lengthy lists of tables and data.

### **Full Service Research Capabilities**

Association Laboratory is a full service research consulting firm providing comprehensive, sophisticated services.

Association Laboratory has expertise and experience with both qualitative and quantitative research tools. Over the years, we've implemented online, mailed, telephone and integrated quantitative research methodologies. In addition, we use a wide variety of qualitative techniques based on the needs and budget of your association.

We work with you to assess your research goals and custom-design a research process that maximizes the data collected and insight gained for the time and financial resources invested.

Association Laboratory implements multiple quality control checks on all research projects. First, all questions are approved by client staff prior to instrument design. Second, all instruments are reviewed and approved by clients prior to deployment. Third, all data received is analyzed for potential errors prior to tabulation. Finally, all tabulations are reviewed to assure clients that the numbers they receive accurately reflect actual respondent data.

Association Laboratory uses a variety of technological systems to support both online, paper and telephone surveys. Association Laboratory produces survey reports in Word, Excel and/or SPSS file types for clients based on their needs and capabilities.

## **Client Service**

Association Laboratory is committed to client service.

While we develop research methodologies to specifically meet your needs, we understand there are many ways to skin a cat and that, often times, changes in the situation dictate changes in the delivery of the final research product. At Association Laboratory, the research process is driven by the needs of the client not the whims of the researcher.

Association Laboratory respects that not every decision can be known at the beginning of a project. You will not be “nickel and dimed” for every additional conference call, survey question or table.

Association Laboratory maintains strict confidentiality of your association’s activities. Business plans, strategies, materials, and methodologies are not publicly released so that the work you pay for remains proprietary.

We establish clear rules of engagement from the beginning so you understand the nature of our services and have the opportunity to provide input and guidance throughout the project.

## **About the author:**

Dean West  
President  
Association Laboratory

Dean West is the founder and President of Association Laboratory. He is a former association executive and CEO for state, national and international associations. Mr. West is a nationally recognized expert on association research and strategy.

Association Laboratory specializes in the research and development of association organizational, marketing and delivery strategy. The award winning company serves a nation-wide client base representing some of the nation’s leading associations of all sizes, types and budgets.

Information on Association Laboratory can be found at [www.associationlaboratory.com](http://www.associationlaboratory.com).