

Date:				Client company:
Client contact names & positions:				

Background Situation – what has led to the need for this research?
Company details, recent, relevant history, issues of importance, e.g. personnel changes, competitor activity, budget changes etc.

Current situation requiring research – what do you want to know – in overview?
*Product or service / market to be researched, relevant history, current status.
See checklist on next page of specific points...*

Current situation requiring research:

- What is **already known**, including market or customer base.
Is there any ongoing or other research in progress that overlaps with this brief?

- What questions does the research need to answer?
(Note – this is not about what you need us to ask, but what questions you want to answer)

- Why this information is needed, and how it will be used?
What will you DO when you know the answers to your questions?

- **Who** will be using the research – key stakeholders?

- Any relevant information from **previous research**?

- How **robust** must the answers be?
(what's the risk of being x% higher or lower – e.g. are you going to build a factory based on these results?)

- What will be the **controversies** or arguments surrounding the research or results?
Are there any internal political issues we need to be aware of?

- **Key samples of interest** – who must be included in the survey population, and who else would be of interest / nice to have included?

- **Resources available for the research**
E.g. client lists, industry details, database history, ability to use cardholder contacts & data etc

- **Any client methodological likes / dislikes?**
Have you had bad experiences in the past? Or 'love' certain methodologies?

Timing

When do you need the **proposal** by?

Is there a specific **time for conducting the research** that would be better or worse? (e.g. seasonal impacts, events that skew your market) For tracking, do you need **continuous** measurement, or would it be better / acceptable to focus interviewing on specific **points in time**?

When do they need the **results** by? Toplines / full results? For tracking, how often is it useful to debrief the project?

Are there specific dates that we should know about – strategic planning, budgeting rounds, etc?

Budget available?

Best to give some ball-park estimates to avoid both parties working on inappropriate assumptions.

Is this a competitive pitch?

Please tell us at least how many companies on in the pitch, and preferably who?

Who will be deciding which provider to use, and whether or not to proceed with the research?

Proposal presentation? We really prefer to present the proposal in person – can we?

Interest in Synovate?

Are there any specific reasons you have chosen to include Synovate in your consideration for this proposal? What if any specific reasons are there for not using your normal / incumbent research supplier for this work?