



## **Research 2008 Awards**

### **MRS / BIG Business-to-Business Research Award**

#### **Winners**

Nick Bassett – Vodafone UK EBU  
James Burckhardt – ICM Research

#### **Extract from judges**

“Excellent. A project which genuinely seems to have had all parties working together with mutual respect. Vodafone’s commitment to the project is great, as is the way in which ICM managed to select participants to take part in this high commitment project. The way in which the findings were embedded both at the time and ongoing is also impressive”.

**SME Immersion 2007**

***How true collaboration and partnership in research can drive business success***

**MRS / BIG Award for Business-to-Business Research**

**Awards Entry**

***Submitted by***

**Vodafone UK Enterprise Business Unit / ICM Research**



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**Vodafone / ICM Research: SME Immersion 2007**  
***How true collaboration and partnership in research can drive business success***

**How did this project demonstrate an innovative approach to research?**

The success of the SME Immersion project relied upon an innovative research methodology and a highly collaborative working relationship – more specifically

- It required stakeholders from around Vodafone to be involved in key stages of the interviewing and to take ownership of reporting back the findings from the study
- It used adapted ethnographic techniques to deliver a deeper level of insight than other B2B research methods.
- It delivered a range of research outputs including i) a qualitative research model designed by ICM ii) distribution of participant video documentaries on iPods and iii) physical reminders including top trumps summarising each case study

**What were the demonstrable outcomes of this project?**

The project has had a direct impact on Vodafone's approach to the SME sector. It prompted a wholesale review of their 'channels to market' strategy. More widely, the results have been incorporated into sales, product, service and communications planning both inside Vodafone and amongst their external agencies. Following the final debrief, Vodafone held a series of internal workshops to share the results with a wider group of stakeholders.

**Why this entry should win this award?**

For the Vodafone EBU, this project was a catalyst to business change. More significantly, it remains a source of 'living' insight that is owned by a group of senior stakeholders within Vodafone and can be recreated via use of any of the range of research outputs.

For the research industry, this project is a compelling example of how research agencies need to challenge the traditional client – research agency relationship. The success of the project and the energy for change that it created relied upon this collaborative methodology and the shared ownership of project delivery.

# **Vodafone UK & ICM Research SME Immersion 2007**

**How true collaboration and partnership in research can drive business success**

**Date:**

Project commissioned: June 2007

Project completed: October 2007

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# 1. Synopsis

**immerse** [Show phonetics](#)

verb

**1** [R] to become completely involved in something:

*She got some books out of the library and immersed herself **in** Jewish history and culture.*

**Extract from Cambridge University Press Dictionary**

This paper provides a detailed review of the 2007 Immersion Research project. Designed and delivered by ICM and Vodafone EBU (Enterprise Business Unit), the key themes of this paper are as follows:

- How the benefits of developing a close, collaborative working relationship between client, agency and research respondent contributed directly to the success of the Immersion Research.
- How innovative qualitative techniques were used to deliver highly actionable insight and how this ensured it remained embedded within Vodafone EBU.
- How the Immersion Research technique had direct impact on the outlook, behaviour and thinking of a wide range of stakeholders within Vodafone EBU.
- That a range of engaging and entertaining tools guaranteed the research would remain fresh, long after the project had been completed.

## 2. Background & Objectives

In late spring 2007, Vodafone EBU recognised a need to improve their understanding of UK small to medium size enterprises (SME). Defined as businesses with 10-250 employees, the SME segment represents a significant proportion of the Vodafone EBU customer base and makes an important contribution to revenues.

Vodafone EBU already had extensive secondary and primary SME sector research available. This provided detailed descriptive information and also formed the basis of a segmentation model of SME businesses. However, existing research fell short of providing insight that enabled key marketing, product, service and sales staff to truly empathise with and visualise the SME segment. The EBU managerial team therefore identified a need for getting closer to the SME business sector and to immerse themselves in understanding life as a SME.

The stated project objectives are summarised as follows:

**Figure 1: Extract from Vodafone Research Brief**

**Vodafone need to conduct an in depth research project to enable marketing and segment teams to really get close to their SME customer base.**

**The bottom line is that Vodafone wants to understand what it is like to be a SME – more specifically:**

- **Their business needs and challenges**
- **To design an implementation plan that enables the insights to be adopted into brand, product and communication planning and development**

To meet these requirements, the Vodafone EBU management team decided that an 'involving' research approach was required and thus gave approval for a team of 15 senior Vodafone staff to be immersed into a range of SME businesses across the UK. The Vodafone Immersion project team and participants (respondents) were required to work in close collaboration with the research agency to build a detailed picture of each of the businesses included in the research and then bring this to life via personal experience, video documentary and physical evidence. For Vodafone, the project represented a significant undertaking as each member of the team of 15 senior managers was required to commit around 5 full days of their time to the project.

It was decided at a very early stage that, in order to fully understand life as a SME business, the project would need to distance itself from focussing too heavily on the topic of mobile communications. Throughout the project everyone focussed on the core aim of understanding life as a SME, therefore any discussion of mobile communications was only allowed if it emerged naturally from the themes and topics covered. This represented a bold stance for Vodafone EBU and proved to be an essential ingredient in successfully delivering the objectives of this high profile project.

### 3. Research Solution

From the outset, it was clear that to meet the objectives of the project it would be essential that members of the Vodafone project team were involved in the project as research partners working to deliver a collaborative result.

Therefore, based on the requirements of the project, ICM and Vodafone worked together to create the Immersion research technique.

The Immersion research technique is essentially a commercially adapted form of ethnography. The aim is to observe small businesses in their own environment on more than one occasion. To extend this further, participants are equipped with the tools that will enable them to document their own business lives in considerable detail.

The project methodology is summarised in Figure 2:

**Figure 2: Summary of Project Methodology**

**2. Recruitment:** 15 participants were recruited to take part in the ethnography, each representing different sectors, job functions, size of business and segment. Businesses across the UK were recruited and participants were typically MDs, owners or directors / senior managers. Each participant was incentivised to take part in the study. Each participant was visited at least twice with the option of a third visit.

**2.1. Immersion Visit 1:** During the first visit (carried out by ICM) participants were given a detailed explanation of the study, the visit then covered background and business information - the aim being to build a rapport and open dialogue with the participant. They were also briefed on the video documentary requirements ...

**2.2. Observation: Video Documentary:** Each participant completed written & video diaries, involving participants recording experiences in either the 1<sup>st</sup> or 3<sup>rd</sup> person. They were encouraged to record specific moments in the day (e.g. at the end of a particularly good or bad day). They were also asked to film the everyday life in their business and their colleagues and peers.

**2.3. Immersion Visit 2+:** Participants were revisited 10-14 days later by the researcher AND a Vodafone project stakeholder. At this stage we explored their business in more detail and reviewed their diary. Typically this meeting would involve a tour of their business and introductions to key staff. **Over the course of the two meetings the total time spent with each participant was at least five hours.**

#### 3.1. *Immersion Visit 1: Developing a partnership and an open dialogue with participants*

It was critical at this early stage that participants were comfortable with their involvement in the project and were reassured that any material they provided would remain confidential. Although their individual and business identity would obviously be revealed to Vodafone, it was stressed that they would not be required to reveal any sensitive information regarding their organisation. Furthermore, they would have final control of any business information used in the reporting.

Many participants assumed that the project would focus on mobile communications and technology. Therefore there was a need to emphasise that the scope of the project was much broader and that technology and communications were only two aspects of the research. This very open approach to the subject matter and structure of the visits was pivotal to engaging the research participants and ensuring that they found the experience stimulating, thought provoking and enjoyable.

Overall, the aim was to be completely transparent in the explanation of the motivations for the project and to stress that the project was collaborative. It was felt that this approach was critical to ensuring rich insight from each participant. Throughout the project, individuals who agreed to get involved in the project were described as participants rather than respondents – to emphasise the collaborative nature of the project.

### **3.2. *Video Documentary: Gathering rich insight from businesses***

Participants were provided with a digital video camera to document aspects of their working lives and were also supplied with a diary and notes to guide them through this task. This diary included questions that participants were encouraged to video their responses to, plus ideas for aspects of their work that they might want to document. Participants were also contacted midway through the diary phase to check how they were progressing with collating video footage and to offer some suggestions on further subject matter for the video diary.

### **3.3. *Immersion Visits 2+3: Immersing the Vodafone management team***

It was imperative that all visits to the individual businesses recruited for the research were carried out by the same member of the ICM project team. This ensured that there was continuity in the development of the relationship with the participant and encouraged an open dialogue between participant and project team. For the second and third visits, the ICM researcher was accompanied by a member of the Vodafone project team (subsequently referred to as an 'immersee' throughout this report). These visits were scheduled approximately 10-14 days after the first visit. The format of each visit was flexible, in most cases the visit would include a tour of the business premises and introductions to other members of staff. The visit would also involve a longer meeting to review key themes in more detail and revisit topics that had been touched on during the initial meeting.

Between the first and second visits, the ICM project executives prepared packs with a summary of the information gained from the first visit. This information was supported with photographic images and website references, illustrating the business and the individual participant. These packs were sent to the Vodafone team member ahead of the visit and a pre-visit call or meeting was also scheduled where the ICM and Vodafone representatives would run through aims and objectives for the second visit. It was critical that the Vodafone team member saw their role as a participant rather than as just an observer. They were encouraged to ask questions throughout the second

visit and participate fully in the interview. Essentially the Vodafone immersees became partner researchers in the process and several commented on how being involved in the project had altered their view and appreciation of the qualitative research process.

In some cases a third visit was scheduled with a business. This was often timed to coincide with a particular event or period of business activity so that the ICM and Vodafone team members could gain first hand insight of the impact on the business.

The second and third visits proved particularly insightful as ICM and Vodafone noticed that there was often a marked difference in the outlook of individual participants depending on the level of business activity during preceding days and weeks. During particularly busy or stressful periods there would be clear differences in body language and responses that individuals would give to particular questions and themes. This volatility became a recurring theme throughout the research and was a factor that could have only been identified through the multiple visit approach pivotal to the Immersion methodology.

Although all visits were video recorded, the individual ICM and Vodafone project team researchers also scheduled a short debrief immediately after each visit to systematically collate their first impressions whilst these were easily recalled. This process of capturing immediate insight proved critical to the Immersion process as it enabled immersees to recall how it felt to be part of the business at a later date.

## **4. Immersion Project Workshops**

As the project lasted four months and required the involvement of the Vodafone EBU team throughout, it was essential to plan activities that would sustain momentum and interest during the project. Therefore a kick off workshop and two interim Immersion workshops were included in the time plan. These were used to bring together the project team at specific milestones and to help maintain the energy and motivation that was so essential to the success of the project.

### **4.1. *Kick Off Immersion Workshop***

The kick off workshop involved all members of the ICM and Vodafone project team. As with all meetings held during the project, an unusual and stimulating venue was selected that helped project members to think differently, outside the confines of the everyday workplace. Using an external venue ensured that workshops were on neutral territory, away from the locations where agency and client meetings were traditionally held and this helped foster a more collaborative working culture across the whole project team.

The kick off meeting was held at a premiership football club. The session was designed to be interactive, informative and, most importantly, motivating. The meeting was introduced by a key stakeholder from Vodafone – to explain why the Vodafone Immersion team had been pulled together and to underline the importance of the project to the business. ICM then ran through the logistics of the project and what was expected from the Vodafone project team members.

Two guest speakers were invited to the event; firstly a documentary film maker gave a short presentation about guidelines on filming individuals in their place of work whilst minimising any potential intrusion and reducing awareness of the camera during the visits. In pairs, the Vodafone team were then tasked with filming short interviews with each other to demonstrate the importance of keeping check on filming techniques.

Following this presentation, the Commercial Director of the football club spoke to the project team. The club employs less than 100 staff and therefore met the criteria that Vodafone was interested to understand. Having previously worked at a large media company, this speaker was able to give an intriguing perspective on life working for a SME company compared to life in a large corporate business.

The agenda also included a breakout session where Vodafone participants were asked to list the five key aims that they personally wanted to achieve through their involvement with the project. Discussing and capturing these helped all individuals to feel as though they had a personal stake in the research and also provided an excellent starting point for refining the objectives of the project. These aims were regularly reviewed and referenced during every stage of the project.

#### **4.2. Mid Stage Immersion Workshops**

The structure of both mid stage workshops was similar; initially ICM would present an overview of the project status (e.g. how many Immersion visits had been completed or were scheduled). After this introduction, the Vodafone immersees who had been on visits to businesses presented back their initial thoughts and experiences together with any advice on question and interviewing techniques for their colleagues. This aspect of the project was important because it began the process of collating and distilling down the insights drawn from each visit and encouraged participation from the whole team.

These short presentations were beneficial both in terms of sharing initial findings and for giving the Vodafone immersees the opportunity to express what they had learnt from the visit and how it had challenged any assumptions about the SME segment. During these workshops, ICM project members and Vodafone immersees would also take an opportunity to run through the key insights emerging from the project.

#### **4.3. Final Workshop**

The final project workshop was held at a film studio and was structured around a carefully designed agenda for the day.

The venue was chosen because the space was very different from any normal conference or office space. Instead it was a bare studio with open brickwork and wooden floorboards, it was a large flexible space with two large areas suitable for projection. We wanted the setting to help immerse the Vodafone project team in the lives of the businesses, so large posters of the pen portraits for each business were mounted on the walls around the studio. Also the Vodafone immersees were placed in a horseshoe table setting and for the purposes of the workshop they were required to adopt dual persona, that of their SME business participant as well as their own. One large screen was used to present film footage of each of the documentaries prepared for each business. A separate adjacent screen simultaneously showed the charts that the Vodafone team had prepared on their six key takeouts from each case study. The individual cases were presented by the Vodafone immersee. Grouped together in sessions of four, each case study presentation was carefully timed to last ten minutes including the presentation and Q&A.

We believe these efforts in selecting a venue and creating an unusual atmosphere for the debrief were key to the successful outcome of the project. They all contributed to taking the Vodafone project team away from their day-to-day roles and to participate in the workshop as business owners or directors. It was critical that the Vodafone immersees were responsible for presenting the learnings from the businesses themselves. By doing this they were made owners and advocates of this insight, ensuring that the findings were kept current and at the heart of the Vodafone EBU. In effect, when they returned to their day-to-day roles they became representatives of SME

businesses. One year later, they continue to provide a knowledge resource that is tapped into for any relevant business requirement.

After reviewing each of the Immersion cases, time was also allocated to idea generation, designed to generate specific initiatives and action points that could be taken back to the business. These breakouts were focused on four areas where the Vodafone EBU team were seeking to apply the insight gained from the Immersion project: Sales, Product, Communications and Service. Members of the ICM project team moderated these breakout sessions, the aim being to identify specific tactical programmes that could be initiated when the Vodafone project team returned to their day-to-day roles. Details of these initiatives were captured and reported as part of the final deliverables from the project.

## 5. Analysis, Insight & Deliverables

The involvement of the senior management team of the Vodafone EBU meant the project held a high profile within the organisation and hence expectations for the project deliverables were also high. At the start of the project a number of requirements for the Immersion research were established –these were as follows:

- Immersion **must provide actionable insight** – that can be applied strategically or tactically to all SME business sales and customer management activities
- Immersion **must foster a highly collaborative and open working environment** where there are minimal concerns or inhibitions about challenging existing ways of doing business
- Immersion **must provide insight and learnings that can be shared with the rest of the business** via a variety of media
- Immersion **must be memorable and engaging** – the Vodafone immersees will come back to the business with a detailed understanding of and empathy with the participating SME businesses

ICM worked with Vodafone to develop a range of research outputs that would meet these requirements and also provide different levels of detail according to the requirements of the internal audience. Whilst some of these deliverables were familiar to other qualitative research projects, others deliberately took an unorthodox approach. This was important because to be memorable to a very wide audience around the Vodafone EBU the deliverables needed to inform, engage and even entertain – each of these criteria was critical to maximising the impact of the research.

A summary of the deliverables is as follows:

- Video Documentaries & Video Diaries
- Pen Portraits
- Top Trump Card Game
- The Kaleidoscope Model

### 5.1. Video Documentaries & Diaries

The video diaries compiled by individual participants yielded fascinating results. Inevitably the amount of footage supplied varied between participants, but all contained unique insights and unusual perspectives on the business. Some examples included the following:

- One participant (safely!) filmed themselves whilst driving to another company site reviewing activities planned for the day and challenges and frustrations with the business
- One participant spoke at length to the camera at 3am in the morning prior to taking a flight to Holland for a business trip, he provided a unique insight into his feelings about the trip and what he hoped to achieve. He also expressed his motivations for working so hard and

how he had been influenced to work in this manner by his father and other family members

The quality and quantity of the video diary footage was a testament to the success of the Immersion technique and the involvement of individual 'respondents' as participants collaborating in the project.

This video diary footage combined with the recording of the research visits typically produced 8-12 hours of footage. One of the key tasks of the research was to spend time reviewing and editing this footage to provide a distilled documentary film that would be both engaging and informative. The output from this process was as follows:

- Video output: 6-8 minute edited documentary films were compiled for each of the 15 case studies, collated from video diaries, meetings and images. Documentaries were accompanied by carefully selected commentary, music and sounds to reflect the case study and ensure each film was unique and memorable. The documentaries were also subtitled and segmented by chapter to ensure that someone not directly involved in the project could easily view and understand them.
- Vodafone EBU recorded an interview with their Business Marketing Director that was added as an introduction to the documentaries. This interview provided a clear statement of intent for how the insight was to be used and how important the activity was for the Vodafone EBU.
- The documentaries were then loaded onto 20 iPods that have since been circulated widely throughout the Vodafone business team – this ensured the research was visible, highly accessible and easy to distribute around the business. As a medium for delivery of the findings, the iPod delivery format has now been adapted as a tool that can be used more widely for qualitative reporting of Vodafone projects.
- The video footage was also categorised by theme so that it would enable easy access to clips and quotations in response to specific queries from the wider stakeholder group inside the business.

The richness of these insights and the impact they had around the business was a direct result of the management of the Immersion process and the relationship between participants from the SME businesses, ICM and Vodafone.

## **5.2. Pen Portraits**

Each of the individuals and businesses participating in the research were profiled in a pen portrait. These pen portraits were designed to summarise key insights from the business. They also sought to bring to life each case study via a series of photographic images, website screenshots, scans of brochures and company materials. These pen portraits enabled members of the Vodafone EBU outside of the project team to gain a quick view of each business as well as providing an aide memoir to those involved in the project.

### **5.3. *Top Trumps Style Card Game***

A Top Trumps style card game was designed to provide an engaging, memorable and entertaining means of comparing the profiles of individual businesses who took part in the Immersion project. Key information from each business was summarised in a series of 'scores'. These scores together with selected images were printed onto oversize playing cards that were distributed in packs to the Vodafone project team. Team members were then encouraged to trade these cards and challenge scores that had been included for the businesses they had visited. Again, these served as an important aide memoir.

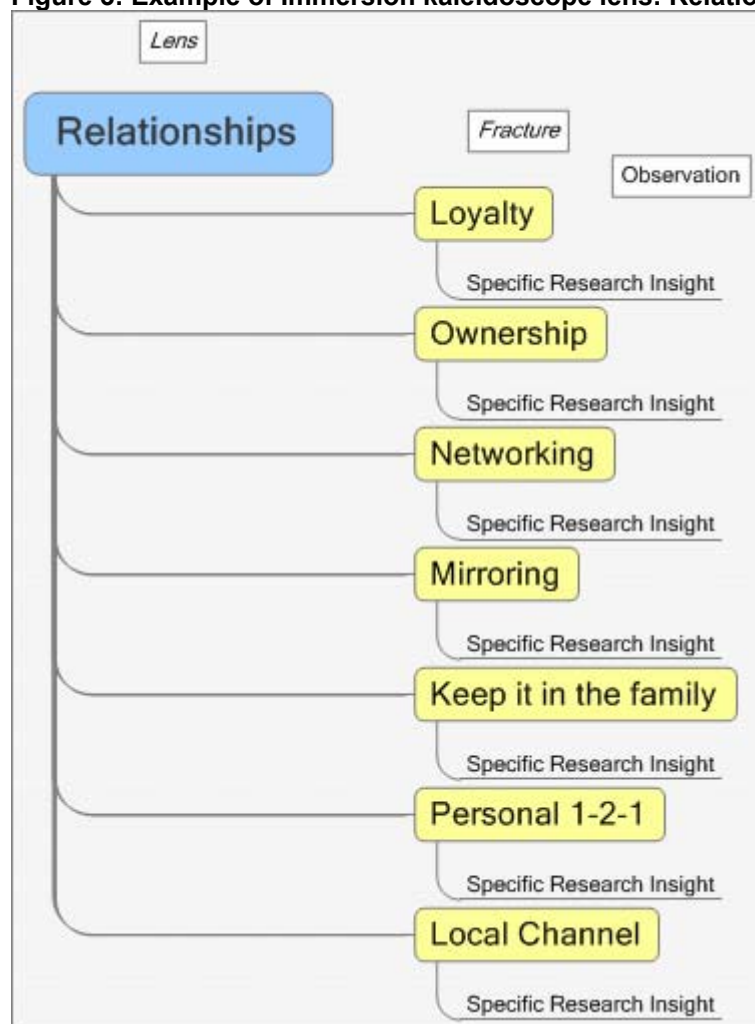
### **5.4. *The Kaleidoscope Model***

One of the key challenges of reporting the Immersion findings was distilling down a large volume of qualitative information into a format where the insight was both easy to understand and, critically, could be communicated and used around the Vodafone EBU. Essentially, the research needed a means of delivery whereby other members of the EBU would be able to call upon the base of research insight and, as required, apply this insight to their own SME business initiatives.

Early in the project ICM began to build a framework of observations that had been identified in each of the Immersion visits. Each member of the project team would discuss key observations with their Vodafone counterpart and then log these in a collaborative workspace built by the project team. As more visits were completed, these observations began to naturally fall into themed groupings.

During the reporting phase, the ICM project team held several internal workshops to review these observations and decided that these should form the basis of the analysis of the research. Work then started on building a research model based on these insights. The model was entitled the 'kaleidoscope', the research themes became lenses, the observations themselves became fractures of each lens. An example of one of these lenses is illustrated in Figure 3:

**Figure 3: Example of Immersion kaleidoscope lens: Relationships**

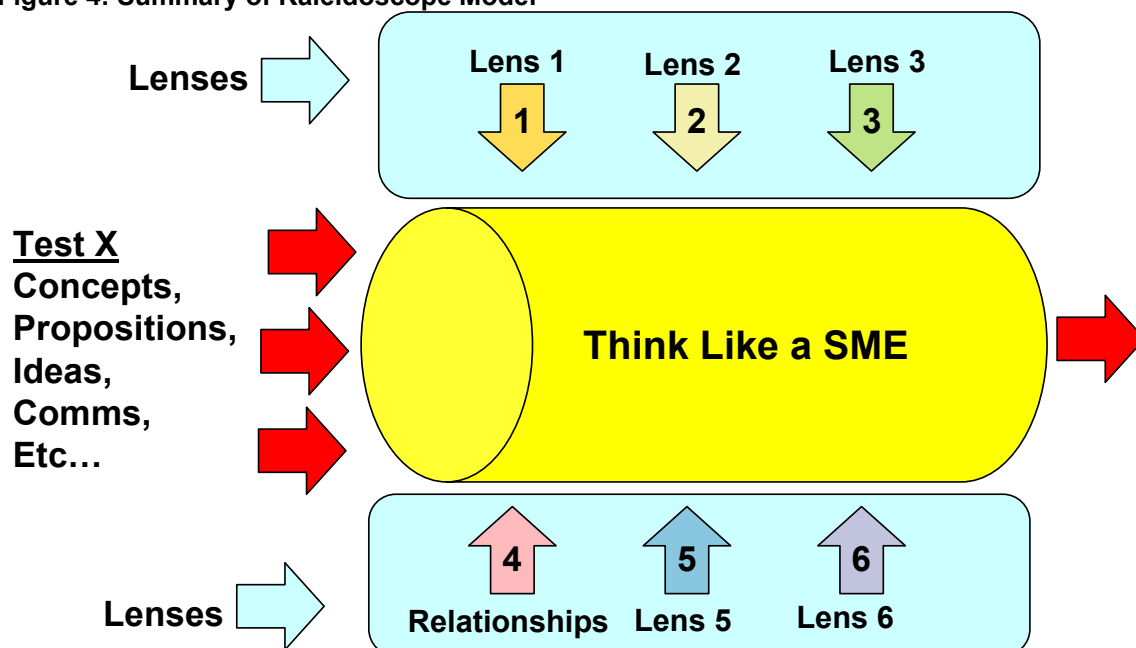


**Detailed research insight restricted due to commercial sensitivity**

In total there were six research lenses and thirty five fractures with some overlap between lenses as some shared common underlying themes. As far as possible each of the fractures was illustrated with an example that would bring it to life. An overview of all the research lenses and their application as part of the Kaleidoscope Model can be seen in Figure 4.

During the mid stage workshop for the project an early version of the model was tested with a real life business scenario that existed within Vodafone. This live test highlighted where the model needed to be improved and where there were any problems with the application of the model. This pilot test of the model was important as it provided an opportunity for ICM to test the theory of the model and for Vodafone to evaluate how the model could be usefully applied to the business. After the mid stage workshop, Vodafone and ICM worked together on developing a refined version of the model in preparation for the final workshop. Again, this collaborative approach to working through the insight generated from the project was critical to the acceptance and use of the research around the business.

Figure 4: Summary of Kaleidoscope Model



Detailed research insight restricted due to commercial sensitivity

### 5.5. *Application of the Kaleidoscope Model*

In addition to creating the Kaleidoscope Model, ICM also recognised that to be of real value and use to Vodafone the model would have to be accompanied by a user manual – a simplified set of instructions for how to apply the model.

ICM developed a process by which the Kaleidoscope Model could be applied to specific business scenarios. This user manual was designed to be used by a member of the Vodafone EBU who had not been involved in the Immersion project. Using video documentaries and pen portraits the model could be illustrated via a series of specific examples drawn from particular case studies.

## **6. Business Outcomes & Benefits**

Vodafone's investment in the SME Immersion project was significant, both in terms of project costs but far more importantly, in terms of the time invested by a group of senior managers from the Vodafone EBU. Therefore the project was under close scrutiny from the business particularly from those not involved in the Immersion visits.

Despite the success of the project workshops and the energy and enthusiasm created during the final debrief, it was recognised that this was only part of the challenge of making SME Immersion a success. Adopting the insights from the research and incorporating them into business planning would require the insights to permeate throughout the Vodafone EBU, changing how people think and develop initiatives aimed at this segment.

### **6.1. *Impact of SME Immersion on Vodafone EBU***

Inside Vodafone, the biggest impact the SME Immersion had was to trigger an immediate review of the marketing channel strategy to best address the needs of the SME segment. As a result of this review, unprecedented changes have been made to the channel strategy, changes that have been driven by the research. In addition, Vodafone is now running customer events at a more local level rather than relying on just the power of the Vodafone brand & various advertising media.

At a more practical level, a series of interactive workshops were run by the project team to brief the whole of Vodafone EBU Marketing around the key findings from the Immersion process. These were also run with all external creative agencies to help shape their future campaigns & communication. The iPod's loaded with video were distributed across the EBU business, right up to Director level to ensure that nobody had an excuse not to have been immersed in the findings.

Many members of the project team have commented on how the experience they gained through the project lives with them one year on. It has provided them with examples of SME businesses that they can bring to life and share with others. This ability to visualize and recount SME behaviour from very close experience has positively contributed to all aspects of planning and development.

### **6.2. *Further benefits of the SME Immersion research***

One of the key strengths of the Immersion technique is this ability to ensure the longevity of the research through the participants who are in the business. Rather than needing to refer back to a report or research agency, the Vodafone EBU team can bring to life SME businesses based on their own personal experience. This insight can be further enhanced by calling up one of the range of deliverables produced to document each case study.

Finally, in 2008, Vodafone have commissioned an extension of the Immersion project to cover other business segments. This is probably the clearest evidence of the benefit of the Immersion technique and its popularity with Vodafone. This extension to the research has incorporated an on-going programme of new Immersion case studies to update and refresh the existing base. The 2008 research also incorporates a further stage for revisiting participants six or twelve months after the initial research. This additional stage will enable the researchers to share and discuss insights from the project with participants and will also enable further exploration of how the business is evolving.

This type of consultative research project represents an exciting development in the research industry. It illustrates how agencies, clients and respondents can work collectively to enhance the insight gained from business-to-business research and maximise the impact this has on the business. It offers a means of further developing the techniques used for qualitative research and also for challenging current perceptions of the role of agency and client.