Marketers, Get More Actionable Results For Your Research Dollar!

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Professional Series
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EDITORIAL DIRECTOR: DR. BRIAN BLAKE

Dr. Brian Blake has a wide variety of academic and professional experiences.

His early career... *academically*, rising from Assistant Professor to tenured Professor at Purdue University, his extensive published research spanned the realms of psychology (especially consumer, social, and cross-cultural), marketing, regional science, sociology, community development, applied economics, and even forestry. *Professionally*, he was a consultant to the U.S. State Department and to the USDA, as well as to private firms.

Later on...on the *professional* front, he co-founded a marketing research firm, Tactical Decisions Group, and turned it into a million dollar organization. After merging it with another firm to form Triad Research Group, it was one of the largest market research organizations based in Ohio. His clients ranged from large national firms (e.g., Merck and Co., Dupont, Land o’ Lakes) to locally based organizations (e.g., MetroHealth System, American Greetings, Progressive Insurance, Liggett Stashower Advertising). On the *academic* side, he moved to Cleveland State University and co-founded the Consumer-Industrial Research Program (CIRP). Some of Cleveland’s best and brightest young marketing research professionals are CIRP graduates.

In the last few years...*academically*, he is actively focusing upon establishing CIRP as a center for cutting edge consumer research. *Professionally*, he resigned his position as Chairman of Triad and is now Senior Consultant to Action Based Research and consultants with a variety of clients.

CO EDITOR (2002): JILLIAN HUGHES

Currently a CIRP graduate student, she graduated Magna Cum Laude from Mount Union College, where she majored in Psychology, with a focus on Consumer Behavior, and minored in Sociology. Among her many research interests; she focuses on Internet buying behavior, and the effects of Social Desirability Bias on Innovativeness Scales. She had the honor of presenting research concerning age differences in brand labeling at the Ohio Undergraduate Psychology Conference in April of 2001 at Kenyon College. She also presented another piece of original research on Internet buying behavior of college students at the Interdisciplinary Conference for the Behavioral Sciences hosted by Mount Union College in April, 2001.

CO EDITOR (2002): JACQUELINE KIRCHNER

After graduating with honors from Mount Union College, she is currently enrolled in the Consumer-Industrial Research Program at Cleveland State University. She has presented independent research on brand labeling effects at both the Ohio Undergraduate Psychology Conference hosted by Kenyon College, and at the Interdisciplinary Conference for the Behavioral Sciences, hosted by Mount Union College. While an undergraduate she studied abroad at the University of Essex in Colchester, England. Having minored in Business Administration and Information Systems, Jackie’s interests lie in Information Technology and its links to commerce and advertising.
Abstract

Too often a marketing executive looks at the results of a market study and concludes, “This is useless! It doesn’t tell me what I need to do!” Fortunately, marketers can take a few simple steps to ensure that research, whether obtained from outside vendors or from internal staff, is truly helpful to their decisions. Cases involving product development, buyer segmentation and brand image positioning illustrate these points. Described are specific procedures that can be helpful in a wide variety of contexts.
THE SITUATION

Consider the situations faced by Jack, Tom, and Dawn, three hypothetical marketers.

Jack  Jack’s job is product development for a consumer electronics firm. His real problem is internal. The sales staff is telling him that the potential buyers want a product with certain features: easy to set up, low price, no maintenance. The technical staffers, who have a powerful voice at the company, tell him that the buyers want good sound, durability, flexible application. The sales and the technical staff are increasingly at each other’s throats and Jack feels stuck in the middle.

To solve the issue, he arranges a market survey to find how much demand exists for the various features. Yet he fears that no matter how the survey turns out some staff will be unhappy. So he shares this concern with the vendor. Together they work out a research plan that they hope will encourage consensus (or, at least, avoid a blood bath) while identifying the best features for the product.

Jack and the survey team implement the plan. It works, and they all live happily ever after.

Tom  Tom is a product manager for a well-known manufacturer. He is responsible for launching a new addition to his product line, an expensive home entertainment center, and realizes that he does not have a clear picture of the consumers who might buy his product. So he contracts with an outside research vendor to conduct a study to segment the market. Not knowing exactly what to expect, he directs the vendor to consider a wide variety of factors—demographics, current purchasing patterns, attitudes toward the product class, etc.
Since he does not have an unlimited budget, he intends to identify market segments with the best sales potential and then to develop his marketing and sale initiatives to attract those target segments.

Unfortunately, when the research is done, Tom finds himself in a quandary. The research study profiled the types of consumers who form each segment… but the research does not indicate clearly which segments are better to target. He was given a mass of data about a segment, but no way of integrating the facts into baselines that can be used to compare the segments’ targetability. Without a numerical tool to determine the effectiveness of targeting some segments rather than others, Tom is uncomfortable for he feels he has to rely on his subjective impressions to make the final targeting decision. Why, he asks, did the research vendor fail to give him a quantitative way to make the best targeting decision?

Dawn Across town in a large advertising agency an account executive, Dawn, is involved in trying to select the best campaign theme for her client. Her agency has been considering four different themes, and she is now reviewing a survey conducted by the agency’s own research staff. The study has identified the number and nature of the potential buyers who resonate to each of the themes. Her challenge now is to as simply and unequivocally as possible, convey to her client why she is recommending one theme as being better than the others.

THE APPROACH

Researchers need to be sure that the research does more then simply provide accurate information. There must be planning from the very beginning to guarantee that the information, when collected, will help the marketer (or advertiser) choose the better alternative from among the options he/she realistically faces.
There are several broad steps that typically enhance the actionability of the research in dramatic fashion. On the surface, these seem unduly simplistic, but they are not. To carry them out requires clear thinking. Read on.

**Step 1**

Before talking to the researchers, the marketer (advertiser, etc.) needs to think through the specific action alternatives realistically facing him/her. "Which choices do I have that are reasonable... at this time... in my situation?"

For Jack with his product features and Dawn with her campaign themes, the alternatives are easily generated. For Tom, though, with his lack of solid information about the market, this is tough to do.

**Step 2**

Next, still before talking to a researcher, the marketer needs to answer the question: "What specific yardsticks should I use to select one action choice out from among the other choices?" "What pieces of information reflect these yardsticks and, so, are the significant decision points?"

Sad to say, some marketers are loath to do this. Perhaps they feel they lack the knowledge or experience to do so. Others lack confidence or feel unfamiliarity with the research technique and, so, turn the entire thing over to the researchers. Others feel they lack the time... or are just lazy.

But if the research is going to be worth the time and money spent on it, this prior thinking is essential... and is not as hard as some people may think.
Step 3

Review with the outside research vendor or the internal researchers your decision alternatives and the yardsticks you propose to select the alternative.

This review should, first, help the marketer to fine-tune the practicality and coverage of the marketer’s decision framework. Secondly, the review identifies the particular pieces of information the study must collect and the way in which the data are to be analyzed.

Unfortunately, many outside research vendors are reluctant to do this. Some research firms are just “order takers”. They ask the marketer which particular pieces of information he/she wants to know, and then collect the data (often by a fairly simplistic survey), analyze it (again, often in a simple manner), report the results, and submit the bill. Other vendors may be loath to do such an in-depth review because they lack the sophistication or because the time and effort doing this cuts into the vendor’s profits.

Sometimes this simple type of research is all that is needed. Far more often than not, though, this approach turns out research that is short on actionability.

We feel that if a vendor is reluctant to do this in any more than a cursory fashion, then the marketer should seriously question whether that vendor is the appropriate one to hire.

Step 4

The marketer works with the researcher in planning the research procedures so as to insure that each of the alternatives is assessed and that the yardstick information is systematically collected.
At this time, before any data are collected, the researcher and the marketer know the nature of the data and explicitly how the marketer will use the data to make the decision(s).

Note that this systematic planning does not preclude the serendipitous finding, the unexpected bombshell of unanticipated results. Instead, the opposite is true. Because the decision framework is in place, the marketer/researcher team can more readily see the implications of the unexpected findings and modify the decision making accordingly.

Later we will illustrate this step with Tom’s use of hit/coverage rates as a yardstick and Dawn’s employment of odds ratios as an assessment and communication tool.

### Step 5
Before the study procedure is finalized, the marketer must consider any internal obstacles that may emerge within the company that stand in the way of an objective, unbiased review of the data. If any challenges appear likely, the marketer must work with the researcher to develop, as effectively as possible, a procedure to combat that challenge.

Jack’s situation is a good example. How can the research project be conducted so as to not only minimize the chance of the sales or the technical staff submarining the research, but also to contribute to internal harmony and consensus?

### SOME PROCEDURES

The following procedures are a few ways of using the steps to provide actionable results. These three cases not only illustrate the steps, but also are themselves applicable to a wide range of research projects.
Jack’s Job

Prior to the launch of the research, Jack and the researchers outline several pitfalls they can encounter when making known the results of the buyer survey.

1) If the results do not come out as one or the other staff group anticipated, the “slighted” staff can become vociferous critics of the survey’s methodology… and of the researchers’ competence.

2) The staff may adopt a judgmental orientation rather than an analytic one. The former would be expressed in comments such as, “These respondents don’t know what they are talking about!” Instead, it is better for the staff to be more analytical…”What do the buyers feel? Why do they feel that way?”

3) At least some of the staff might experience embarrassment or may fear suffering a loss of face when their anticipations are not supported by the data. Above all, Jack knows it is essential to help all the staff avoid the charge, “You said that the market wants XXX, but the survey shows they really want YYY. You obviously are not in touch with the buyers!” Criticisms or even anticipations of criticisms, such as this can provoke a civil war and bring the company’s rational product development processes to a grinding halt!

Jack and the researchers set out to reduce the chance of these challenges occurring. First, before finalizing the questionnaire they bring together representatives of the various divisions of the staff. They know they cannot bring together just the two competing staff groups, but have to bring other sections on board also. This task force or project team reviews the sample/questionnaire/analysis plan. This review, preferably directed by the researchers, is geared to get staff to sign off on the procedures before the data are obtained.

Getting this task force to sign off may well encounter some bumps in the road, but can typically be accomplished. In general, some modification of the sample or of the
questionnaire items should be anticipated before everyone will accept the procedures. The goal is to have the task force commit to the procedures and so reduce the chances of later criticism of the study results.

Next, while the data are being collected, Jack asks the individual staff members to answer the survey as they anticipate the average respondent will do. Jack forthrightly explains to the staff that these predictions will help the researchers know how to focus their research reports. It would be a waste of the staff’s valuable time if the research report details at great length results that are widely anticipated. Instead, he indicates the research reports should concentrate upon results that are not anticipated. Jack also points out that doing this prediction task helps the staff to put themselves in the shoes of their customers. It encourages them to think analytically about what lies beneath the consumers’ choices.

It is critical that Jack stresses that no individual’s prediction will be made public by the researchers; predictions will be grouped together in the analysis. We would not want to put a staffer on the defensive!

Finally, Jack notes jovially that this prediction is fun. In this instance, the staff (as a whole) will win a “prize” if the researchers find that the company’s staff is more accurate than were the other recent client companies of the researchers in the past year.

Next, when the data are in, the researchers analyze the data for a two-phase presentation. The first phase addresses the internal differences of opinions and encourages all groups to see the results as a win-win situation. The second phase is the analysis that will have been presented if there had been no additional steps taken to overcome the internal dissension.

In phase one, researchers aggregate the various staff groups—sales, technical, and others. The predicted feature preferences of each staff group are determined. Subsequently, respondents are identified who match these predictions. So, for the sales
staff, respondents are selected who answered as the sales staff predicted. These respondents are then pooled as “Sector 1”. The personal profiles of these respondents are identified. In this case, they turn out to be high volume buyers of electronics, current customers of the firm, and are middle aged and affluent.

The same analysis is performed for the technical group; this yields a “Sector 2”, respondents who judged good sound, durability, and flexible applications as most important. Their profile reveals them to be young, highly educated, and professional but not yet affluent. Again, a sector and its profile are derived for other staff divisions—distribution staff (with Sector 3 respondents), communications staff (with its Sector 4 respondents) and production staff (with its Sector 5 respondents). These other staff divisions were used to round out the rest of the company’s staff divisions and to avoid patently focusing the spotlight just upon the two dissenting staff groups.

An analysis is done to show the preferences of the various sectors. Here, a geometric preference map does this (below).

The map displays the preferences of the various groups. For illustrative purposes we combined Sectors 3 to 5 into “Other Sectors” and the other three staff groups into “Other Staff”. The locations of the points and the distances between the points are mathematically estimated by a technique called multidimensional preference scaling analysis.

On the map “.” indicates a group’s ‘ideal point”, i.e., the type of product that is considered most appealing. The closer a product feature(s) is to an ideal point; the more appealing that feature is to the group in question. For example, Sector 2 respondents prefer good sound and durability well over easy set up and no maintenance.

The closer together are ideal points, the more agreement there is on the preferences. So the ideal points of the Sector 1 respondents and Sales Staff projections are fairly close together, indicating that the buyer preferences as projected by the sales
staff matched the preferences revealed by Sector 1 respondents. Sales Staff projections and Technical Staff projections are, as anticipated, quite disparate.

The map on the following page demonstrates to the sales staff that, indeed, they were correct in feeling that consumers (some) demand easy set up, no maintenance, and low price. The map also shows that, indeed, the technical staff was correct in feeling that consumers (some) want durability, good sound, flexible applications.

*Phase I Map*

```
△ Easy Set Up
  - Sales Staff Projection

△ Good Sound  △ Low Price  △ No Maintenance
  - Sector 1 Respondents

△ Flexible application  △ Durability
  - Other Sector Respondents

△ Tech Staff Projection
  - Other Staff Projections
```

It appears that the high volume, middle-aged affluent customers (Sector 1), was grabbing the attention of the sales staff. On the other hand, the young professional market (Sector 2) was making its views known to the technical staff. The researchers observe that these different anticipations of the sales and technical staffs were realistic and sensible.

Thankfully, Jack points out, the study reached all sectors of the market. Combining all sectors in a Phase II map, the total market appears to want good sound, low price, and durability more than other features, and when the anticipations of the entire staff are combined, these anticipations are right on target for the total market. So,
the researchers conclude, integrating the views of all the staff allows the company to have its finger on the pulse of the market.

Jack and the researchers then commend the staff for their sensitivity to market nuances and launch into the strategically meaningful analyses that would have been done without the "side trip" of addressing staff dissensus.

**Phase II Map**

<table>
<thead>
<tr>
<th></th>
<th>Easy Set Up</th>
<th>Good Sound</th>
<th>Low Price</th>
<th>No Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Total Market</td>
<td>Combined Staff Projections</td>
<td>Durability</td>
</tr>
<tr>
<td>Flexible application</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The steps leading up to the Phase I analyses, and the tenor of the discussion as Phase I results were presented, make the respective staff camps more amenable to an open minded analysis of the data and, subsequently, to consensus about the company's strategic actions.

**Tom's Targeting**

Tom needs to build into the project clear criteria for selecting one or more segments for targeting. He decides to use segment “hit rates” and “coverage rates”.

Suppose the research revealed five segments, A to E, and Tom wants to choose the targets based on two yardsticks.

- What's my chance of capturing the business that's in a segment?
- How many segments do I need to target in order to garner a reasonable share of the total sales that exist in the entire market?
Given this, Tom and the researchers built into the survey questions about a buyer’s purchase of products comparable to Tom’s new one, as well as questions about purchases, which that person made for all products in that class.

That information is used to compose the following table.

<table>
<thead>
<tr>
<th>(A) Segment</th>
<th>(B) % of Population</th>
<th>(C) Hit Rate</th>
<th>(D) Coverage Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>19%</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>B</td>
<td>13%</td>
<td>40%</td>
<td>29%</td>
</tr>
<tr>
<td>C</td>
<td>31%</td>
<td>10%</td>
<td>17%</td>
</tr>
<tr>
<td>D</td>
<td>15%</td>
<td>10%</td>
<td>08%</td>
</tr>
<tr>
<td>E</td>
<td>22%</td>
<td>11%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Column B is the percentage of the total population who are in that segment (as estimated from the survey respondents). There were 1,000 respondents, so 19% were in segment A.

Column C, the Hit Rate, is the percentage of the people in that segment who buy products of the type Tom is introducing. So 30% of the people in segment A buy a product of the type Tom is launching. The Hit Rate is usually considered to be the probability of making a sale in that segment. It is also expressed as the probability of capturing that segment’s business.

Note that the issue becomes more complex (but is still workable with a revised Hit Rate computation) when people buy multiple products from multiple brands. At this point, though, there’s no use muddying the water with unnecessary detail. So forget this note.
The figures indicate that Tom will be more successful selling people in segments A and B. This is an especially important point if sales are made via contacts with sales representatives or via direct marketing. In these cases, Tom cannot afford to spend time, money, and manpower on low probability long shots.

Column D is the Coverage Rate. First, figure the total volume of sales of items of the type Tom is introducing. Then get the percentage of all those sales that is commanded by a particular segment. Since in Tom’s case a given buyer usually purchases only one item (remember it is a large home entertainment center), then the coverage of a segment is the percent of the buyers (not the percent of the population), which is in a given segment. So segment A would contain 32% of all the customers for products of Tom’s type.

Suppose, though, that buyers differ considerably in the number of items they purchase. In this case, we would total all the purchases of items of Tom’s type (by number of units, by dollars, or by some other gauge of business volume); then we would figure the percent of that total volume that resides in a segment.

If Tom were to target just people in segment A, he will address about one-third of the potential buyers of his product. But he will also leave out of consideration fully 68% of the potential buyers!

Tom considers this coverage too low, so he decides to target both A and B segments. In that case, if successful he will cover 61%, and his hit rate would increase to 34%.

Could he also try to reach for Segment C? That would extend his coverage to 78%, but his hit rate would drop to 22%.

Whether Tom or any other marketer considers adding an additional segment depends on several factors…
Does he have the resources (e.g., budget, sales staff, distribution) to reach a larger number of people?

Do his marketing vehicles (e.g., telemarketing calls, sales representative contacts) involve a meaningful cost? If so, Tom may want to target just A and B and keep his hit rate higher.

Can he simultaneously appeal to all the segments? Suppose segment A and B want innovative, cutting edge products, and segment C wants traditional, “proven” styles. It may be very hard to launch a media campaign to credibly say both things about the same product. If Tom plans to market heavily through broadcast media, he will want to restrict the targets to segments A and B.

The key point here is that if Tom and the researchers are working as a team before launching the research, they will know that the survey must collect information about those product attributes (innovative, tried and true, inexpensive, etc.) which attract each segment. Further, Tom can collect the needed information internally about the per contact costs of the sales staff and about other such considerations while the researchers are in process of collecting the survey data. If it is appropriate that this information is shared with the researchers (e.g., because it is an internal research team), the researchers can be asked to figure these sales costs into the targetability analyses.

In Tom’s case, the actionability of the study results are enhanced by working with the research team to build into the data collection and analyses the information he needs to make the targeting discussion.

**Dawn’s Decision**

Before launching the research, Dawn plans ahead how to convincingly present to her client why she is recommending one theme over others. In collaboration with the researchers, she decides to use odds and odds ratios; so she works with the research...
team in advance to make sure the necessary data are collected and the appropriate analyses performed.

The client’s past campaign focused its messages on the product’s low cost. The alternative ones considered by the agency were convenience, quality, and uniqueness.

The study collects information about the reaction of a respondent to each of the four message themes. This responsivity can be measured somewhat roughly by direct questions (“Relatively how important to you are…”). Or, more preferably, the feedback can be gauged by dollarmetric scaling, multidimensional scaling, or other indirect (and harder to fake) indices of preference. Or, better yet, the responsivity can be expressed as a person’s choices by conjoint or discrete choice modeling.

<table>
<thead>
<tr>
<th>Theme</th>
<th>(A) Percent of Market Attracted</th>
<th>(B) % Ready to Buy</th>
<th>(C) Odds of Reaching Targets</th>
<th>(D) Change Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost</td>
<td>25%</td>
<td>25%</td>
<td>3 to 1 against (statistically, 0.333)</td>
<td>-</td>
</tr>
<tr>
<td>Convenience</td>
<td>25%</td>
<td>50%</td>
<td>Even (50-50) (statistically, 1.00)</td>
<td>300%</td>
</tr>
<tr>
<td>Quality</td>
<td>25%</td>
<td>75%</td>
<td>3 to 1 in favor (statistically, 3.00)</td>
<td>900%</td>
</tr>
<tr>
<td>Uniqueness</td>
<td>25%</td>
<td>20%</td>
<td>4 to 1 against (statistically, 0.25)</td>
<td>75%</td>
</tr>
</tbody>
</table>

Dawn is surprised to find that about an equal portion of the market is drawn to each theme. Column A shows the percent of the people in each theme group.
Column B lists the percent of each response sector that is ready to buy the product if suitably approached; these are the target buyers, the ones we want to reach by our advertising. So, for example, if the advertising were to emphasize product cost, then 25% of the market (Column A) would be particularly interested. Of these people reached, 25% will be targets (Column B). So there is only one target out of every four people the ad “speaks to”. In other words, the odds are 3 to 1 against the client reaching the target customer with that theme. Switching to the convenience theme will give the client even odds, (i.e., 50-50) of reaching the target.

Importantly from the client’s perspective, we will have typed the odds by switching from cost to convenience. With convenience, the odds are 300% what they were with cost. That is a 200% increase in the odds of our ads speaking to those whom we want to reach. The situation is even better with the quality theme. With quality, the odds are about 900% (actually 900.9%) what they are with cost.

The uniqueness theme is a loser, though. Here, our odds will drop 20% compared to the use of the cost theme. Uniqueness is only 80% as good as is cost.

Let us note in passing that Dawn can employ other approaches. We cite this example in order to illustrate the use of odds ratios in conveying the meaning of the results to a client. The basic point, though, is that a simple transform of the analysis can increase the clarity and the import of the results and, thereby, can enhance the actionability of the research.

**Conclusion**

Jack’s challenging issue exemplifies how prior planning can help the marketer overcome internal challenges to taking action. By conducting the study in a suitable manner, Jack can overcome internal dissension and progress with the product development process that the research indicates to be needed.
Tom’s situation illustrates how segmentation and targeting can be made more actionable by arranging for the marketer and the researcher to work together BEFORE RESEARCH IS LAUNCHED. Before gathering information they planned what criteria they would use to select target segments and what data would be collected so that they could later apply those criteria.

Dawn’s case is one in which the actionability of the results is enhanced by putting the results in a form that “speaks to” the agency’s client. The numbers generated by the study (the odds ratios) tell the client: “How much of an improvement is a new campaign over what I’m doing now?”

The bottom line is that the marketer can legitimately expect a research provider - be it an outside vendor or an internal team- to work diligently with him/her to identify and overcome obstacles to taking action.

If the researcher is unable or unwilling to do this, should the marketer work with that particular researcher? If a research vendor substantially increases the project cost to do this “extra work”, shouldn’t that vendor’s professionalism be suspect? If the researcher goes the extra mile to do these things, doesn’t that researcher merit a place in that company’s marketing team?