

The
**AUTHORITY
RESEARCH
BLUEPRINT**



IAN BRODIE

THE UNDERGROUND PROJECT THAT CHANGED EVERYTHING

In 1977, a mid-level consultant in the out-of-fashion San Francisco office of consulting giant McKinsey started a revolution.

McKinsey were focusing the majority of their efforts on strategy, but this consultant was given the task of looking into the impact of “organisation and implementation” on the success of a business. He managed to swing an unlimited travel budget and set off round the world interviewing “as many cool people as I could all around the United States and the world”.

By 1978, he'd got enough data to publish an article with his fledgeling ideas on the tools that managers could use to implement change. In 1979, the Munich office of McKinsey got wind of the project and asked him to present the findings to one of their key clients, Siemens.

From there, things began to snowball. PepsiCo wanted to see the presentation, then more clients, then more articles. Within a year the project had birthed the “McKinsey 7S model” that was to form the basis of much of the firm's work for the 80s and 90s, and the project was written up in the book *In Search of Excellence* which became the first mega-selling business book, shifting over 3 million copies in its first four years.

That mid-level consultant working from an out-of-fashion office was, of course, Tom Peters. *In Search of Excellence* established him as the first “rockstar” consultant, gracing stages around the world and getting paid huge fees to advise major corporations. **A true authority.**

Yet Peters had never held a senior role in industry. Nor was he a creative genius who'd birthed the ideas for the book from his own imagination. He'd simply gone out and done the research.

All the ideas and the insights had been generated by the research process. Partly from the people he'd interviewed, and partly from his interpretation of the data he'd gathered.

Those insights were hugely valuable to potential clients, and they were unique to him. They differentiated him from the legions of consultants claiming to be experts in business performance.

Just to be clear: *Peters didn't become an authority because he wrote a book.*

Literally tens of thousands of people write books every year, but only a handful become seen as authorities because of the books they write. The same goes for the legions more who pour hours into podcasts, videos, blog posts and articles. Few ever achieve more than a tiny audience and fewer still achieve real authority status because of their efforts.

Peters became an authority not because of the book itself, but because of the ideas in the book. And those ideas came from his research project.

Since then many others have followed the same path. Jim Collins carried out a similar (but perhaps rather more rigorous) study to write *Good To Great* and establish himself as the 21st Century's advisor of choice to corporate CEOs. Neil Rackham, a behavioural researcher rather than a salesperson, became known as the "Professor of Sales" and built a giant sales training company on the back of his research into sales meetings for high value sales.

And you don't need to do giant projects or write best selling books to benefit from research. When I first set up in business on my own I wanted to break into advising law firms but struggled because I had no background in law.

So instead, I interviewed senior partners in 20 local firms on "business development best practices for lawyers". The result: suddenly I was in demand. From those interviews I got to know more about what worked in business development for law firms than anyone else they were likely to meet. I became the authority locally on law firm sales and marketing and my business took off.

It's no secret that being seen as an authority in your field is one of the very best routes to attracting and winning clients without the pain, expense and time of many more "traditional" approaches to marketing. But establishing yourself as an authority is much easier said than done.

Doing a research project is one of the most reliable, effective routes to authority. You don't have to be a grizzled industry veteran. You don't have to be a creative genius. You just have to do the work to carry out the project and communicate the results. And this blueprint will show you exactly how.

Enjoy!

- Ian Brodie

WHAT IS A RESEARCH PROJECT?

A research project is simply a method for you to create valuable, unique content that your ideal clients will want to hear. You do that by going out and interviewing, studying, measuring and getting feedback from the real world. You then analyse the input you get and create a report, a white paper, articles, videos or whatever media works best for you to get the attention of your ideal clients to share the valuable insights you've gathered.

There are many different formats that research can take, some of them very complex, rigorous and long term. But as a professional wanting to win clients in a reasonable time frame your best bet is to base your research round an **interview** or **survey**, or a combination of both.

With an interview you ask a series of in-depth questions to a small number of people to gather your data either face to face or over the phone.

With a survey you usually get a larger number respondents to complete an online or paper questionnaire.

With the right questions and the right interviewees or survey respondents you can quickly get a lot of insight into a specific topic.

After you've done your interviews or survey you analyse the results and produce a series of outputs. At minimum you'll share the results with the participants. For authority building you'll obviously share the results more widely, either as articles, blog posts, in podcasts or videos, in a detailed report or in a live presentation.



THE VALUE OF A RESEARCH PROJECT

The primary role of a research project in this context is to help you build authority. To become positioned as a leading expert in your field.

A research project works well for this because of a number of factors:

1. The project creates valuable information that's unique to you. No one else will have access to your material, so if clients want access to the insights from your research they have to come to you.
2. Because you're recognised as the creator of the research, rather than someone reporting it second hand, you're held as more of an expert as a result.
3. The outputs of research projects are much more likely to get you access into corporate clients than other forms of building authority. Executives in large organisation aren't big readers of blogs or listeners to podcasts. But they're very willing to listen to new, unique research that will give them an edge on their competitors.
4. The outputs of research can be used in multiple different formats. You can use it for a whitepaper, a lead magnet, articles, blog posts, videos, podcasts, live presentations or as the foundations of a book.
5. New and interesting research findings make it much easier to get PR, to get your guest articles or blog posts posted on other sites, and to get on the agenda as a speaker at conferences. You're not just re-spinning the same ideas they've seen before, you're offering them something completely new they can't get anywhere else.
6. A research project is a great way to break in to a new industry or sector. You can go very quickly from having limited knowledge and contacts to being seen as a leading expert if you do your research well.
7. The process of research itself builds and enhances your contact base. It's a lot easier to get meetings with senior clients to get their insights as part of a research project than it is to get sales meetings with them. But the process of asking smart questions as part of the research and then feeding back the results will go a long way to building the credibility and trust they need to be ready to buy from you.

WHAT SHOULD YOU RESEARCH?

For your research project to be valuable to you and your clients, it needs to be focused in a way that meets certain criteria.

Firstly, your research topic needs to be **narrow but deep**.

A narrow topic means you'll be able to complete the research in a reasonable amount of time and that you'll be able to keep control of the scope. And by going deep into your topic you'll find meaningful and new insights that will be valuable to your clients.

Secondly, your topic needs to be **based around areas that your clients want to know the answer to**.

It goes without saying, I hope, that if you want to use your research to attract and win high value clients then the research you do needs to be in an area that they care about and has material impact on them (or at least enough of them to build a viable business on).

If you're already working with some of your target clients you may have a good idea of the main areas they care about simply from the questions they ask you. Or you can get feedback on what these areas are by observing interactions in forums or discussion groups or at conferences where your clients participate. Or you can ask them directly or run a short pre-research survey to identify their priorities.

In my experience, clients are primarily interested in three big types of topic:

1. What their competitors are doing (benchmarking, case studies, etc.)
2. What their clients want
3. Big trends in their industry that will affect them (e.g. new technology, new legislation, etc.)

If you make sure your research topic is in one of these three broad areas you're off to a good start.

One of the best ways of framing a research topic to make it interesting to potential clients is to phrase it as "what's the best way to...?".

Examples of this could be “what’s the best way for lawyers to win new business?” (the focus of my research when I was trying to break into the legal sector), “what are the best ways to reduce my IT costs?”, “what are the best ways to improve the productivity of my customer service staff?”.

There will be many supplementary questions you’ll ask related to this core topic (for example “how do you train new people in this?”, “how do you measure improvement?”, “what organisation structure best supports this?”). But at its core, the “what’s the best way to...” question taps in to your clients desire to get a simple answer to help them focus their activities in the areas that will help them get the best results.

Thirdly, you want to look at **areas that haven’t already been covered by others.**

You don’t want to repeat the research done by others, or just confirm accepted wisdom in your industry. You want to be able to share valuable information that your clients can’t get from anyone else. So you need to look in new areas, or to go deeper into existing areas than others have done before.

Ideally, you want to look for **topics that are newsworthy.**

That means picking areas that have the potential for interesting or even controversial findings. And areas that are widely covered in the media you hope to be featured in in the future, whether those are blogs and podcasts, or newspapers and TV. Do a search to see which journalists, bloggers, websites and publications are active in the areas you’re thinking of researching to make sure there’s an outlet for your findings.

Finally, you want the research to **lead naturally on to demand for your services.**

That doesn’t mean you’re going to bias the research in any way: you must be honest with your findings.

But it does mean that you should pick research topics that have the potential to generate the need for your products and services.

So if you work with executives in organisations to help them improve their team leadership, focus your research on teams or leadership or both. Don’t do it on communication, or HR policies or other areas that might be interesting, but won’t lead on to a natural conversation about how you can help clients who found the research valuable and want to improve in the areas covered.

WHO SHOULD YOU INTERVIEW?

There are three types of people who can make great interviewees or survey respondents:

- Your target clients and their peers
- The clients/customers of your target clients
- Industry experts and observers

If you're doing research in the area of sales and marketing, business strategy, or customer service then interviewing the clients/customers of your target clients can be the best route to go down. Clients are always keenly interested in what their own customers have to say and it can be very easy to get them to pay attention to what you have to say as a result.



Unfortunately, it's often more difficult to set up interviews with customers of clients. Your contact base is probably not as well established with them, and there's less motivation for them to take part in the research as they'll be less interested in the findings themselves.

One thing you can do is get introductions from your current client base to their customers to take part in the research. Or you can ask client/potential client interviewees at the end of speaking to them for introductions to any of their customers who might be interested in taking part in the research. It's in their interests to introduce you as it will improve the quality of the information they get from the research.

The usual route to go down in terms of interviewees is to focus on your clients, potential clients and their peers. This can reliably produce insights and information of great interest to your target audience.

The incentive for them to participate is that they get early and in-depth access to the results of the research which will naturally be of interest to them too. The only concern is that they may not be willing to reveal sensitive

information that they believe might give them a competitive edge. Having said that, I've always found that interviewees - especially in a 1-1 situation - are very open with what they share as long as they know the results will be reported anonymously.

You can also add to your research by interviewing experts in the field you're focusing on. Personally, I'd do this sparingly: the goal of the research is to establish you as a leading expert and the source of the information, not them. So you don't want to use too many other experts as this weakens your positioning. Try to pick experts who don't directly compete with you. So if you're doing research on best practices in how to get more customers from your website, you can interview experts on web usability, web performance or psychology - but I wouldn't interview experts in getting customers from your website.

If you can manage it, the ideal balance is to have a core of clients and potential clients as the main interviewees, bolstered by a handful of their customers and a sprinkling of outside experts.

To a certain degree, you're going to be constrained by your ability to get the interviews set up. Not everyone will agree to be interviewed - especially if they don't already know you. So it makes sense to set a reasonable timeframe for your research to ensure you get enough quality interviews to make the research valuable.

It's usually easiest to start from your own contact base and see who would be suitable to be interviewed from people you already know. You can also use LinkedIn to search for potential interviewees and spot common contacts who could introduce you. You can often get introductions to key people through industry associations or groups who will be interested in seeing the results of the research themselves. In fact, partnering with an industry association to do the research jointly under their name can be a great credibility builder and get you in the door much more easily.

After that, your best approach is a short email or letter to potential interviewees describing the research and the benefits they'd get from taking part.

For surveys, the easiest route is to your existing contacts, relevant email subscribers, or to post up the research in online groups and forums frequented by your target interviewees.

Once you have your first few interviewees you can use them to introduce you to others. Some of the best interviews I've done have been a direct result of me asking at the end of a previous interview "who else do you think I should speak to to interview for this research?". Always ask for an introduction to the people they mention or for permission to use their name when requesting participation - it makes a big difference.

If you do a survey in addition to interviews, you can get more interviewees through the survey itself. As the last question of the survey ask "would you be willing to take part in a more in-depth interview over the phone/Skype to go deeper into some of these questions and get your perspective?". Not everyone will say yes, but it will get you another group of people to speak to.



WHAT QUESTIONS SHOULD YOU ASK IN YOUR RESEARCH?

The people you interview will no doubt be busy, so you'll usually have limited time in an interview (typically 45 minutes to an hour). And the longer you make a survey the less likely people are to complete it. So you need to be succinct with your questions.

I usually like to open any interview or survey with an “easy” question to put respondents at ease. If they have to think too hard to answer the first question they may give up on the interview or survey completely. But if they find it easy to answer the first question they'll usually persevere later with questions that require more thought because they're now committed.



After that I like to ask an “importance” question to establish that the topic I’m covering is a real priority. This is vital to do in any research: there’s no point in coming up with clever ideas if they’re not really in an area that has much impact for your clients.

Next I get straight down to business and ask about the main topic of the research.

For the main questions I like to get a balance of quantitative and qualitative data. Quantitative data lets you show your results in graphs, charts and infographics and makes your reports and presentations more interesting. They also show your results are based on a significant amount of data.

Qualitative data gets you the insight behind the quant. Some of your very best findings will come from deeper questions you ask where you allow your interviewee or survey respondent to expand on their answers.

To do this I'll often ask a multiple choice question to start. So I may ask something like "What are the biggest problems you find with X?" or "What are the best methods you've found to do Y?".

I'll then give them a choice of the most common answers to select from, along with the opportunity to add their own choices. I can then graph the results in terms of how often specific answers are selected as the number one issue or selected in the top 3.

Face to face I'll usually use a "card sort" methodology where I print the answers onto small cards and allow the interviewee to sort through the cards and select the important vs unimportant ones. Then I'll ask them to pick their top 3. The tactile nature of handling the cards seems to bring interviewees out of their shell and give more thoughtful answers.

Once they've selected their top 3 I'll ask them more in depth questions about each one such as: "why did you select that one?", "why is this issue important?", "what are the major challenges you've seen trying to implement this?". Ideally I may try to get an idea of the impact of this particular area: "what kind of improvements have you seen when you've implemented this?", "what's the scale of cost reduction if you address this issue?", etc.

For a survey I'll most usually ask the multiple choice question followed by one open ended question where I ask them to expand on their top selection and say more about it.

This combination of a multiple choice question with more in-depth open follow-up gives you both quantitative and qualitative data for your research.

From there I'll ask supplementary questions which give me more background and information on the main topic. So if the topic is about the best team building techniques I might ask about effective ways of training people in those techniques, or how to measure their effectiveness.

I'll usually ask at most one extra question on a survey (too many and the response rate will fall significantly). With a face to face interview you typically ask questions until your time is up.

There's a sample set of interview questions in the Appendix taken from an early research project I did on business development for law firms. You can see from that the type of questions asked and the sequencing.

STARTING YOUR RESEARCH

Armed with your research questions and a list of potential interviewees, it's time to start your research.

It's good to get organised at this stage. Put the initial names you've identified to interview into a spreadsheet or a category in your CRM system and track the different stages of the process, for example:

- Invitation sent
- Follow-up message sent
- Invitation accepted
- Interview scheduled
- Interview completed
- Thank-you sent
- Results fed back to interviewee
- Initial follow-up carried out



You often need to follow up on your interview requests. And for a big name interviewee you might want to try using something that will stand out - send them a gift through the post with a card inviting them to participate. Or offer to make a donation to their favourite charity in return for them taking part.

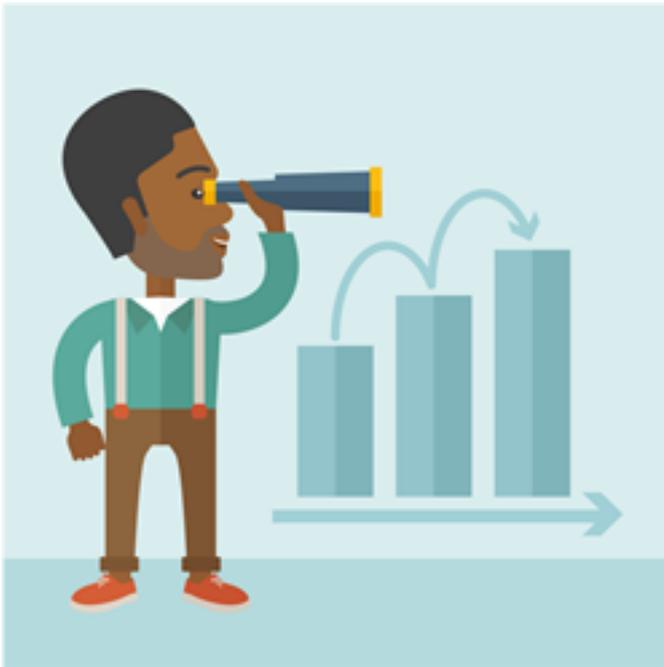
Make sure you thank them for their participation - perhaps even sending a small gift. And after you've fed back the results to them, schedule in appropriate follow-up if they might be a potential client or useful contact for the future.

With a survey it's a similar process for personal contacts. If you're inviting people from an email list or through an online forum or group to participate then the survey tool you use (my personal preference is SurveyGizmo) will do all the admin for you in terms of collating the results. Make sure you set a deadline for completing the survey, and don't forget to go back out to the forum or to your email list to thank everyone for helping.

ANALYSING THE RESULTS

So you've carried out your interviews and got a bunch of data back, now you have to make sense of it!

Usually what happens is that through the interview process or any previewing you do of the survey results, some ideas pop out at you. But I suggest putting these initial ideas to one side initially (as much as you can) until you've done a thorough review of the data.



I usually analyse the quantitative data first. I'll put the answers from the interview into a spreadsheet to see (for example) which issues, questions or solutions come out as the most popular answers on multiple choice questions.

I'll also graph the average scores and the ranges where I ask questions like "what percentage improvement..." or "how many times a year is this..."

I'll also look to spot different grouping of answers. For example if

half the interviewees have answered one way and the other half another way; rather than the data being evenly distributed.

If you've done an online survey, the tool you use will automatically graph and tabulate any quantitative data for you.

The next thing I do is go through the qualitative questions one by one. I typically print out all the answers to a question and read through them with highlighter pen in hand to mark out any particularly interesting answers and any common themes I spot.

Sometimes, if I notice a trend in the qualitative answers, such as 2 or 3 themes coming up again and again, I'll do a count of how often something is mentioned so I can turn a qualitative question into quantitative data.

I'm also looking for interesting quotes I can use in the research findings - ideally a couple of quotes per questions that are either particularly striking, have vivid examples of something, or are a good summary of the general tone of the answers.

I'll do this for all the questions in turn, and then write up the highlighted answers onto post-it notes. I'll also create post-it notes for any conclusions I've drawn from the quantitative analysis (e.g. "#1 issue faced by law firms is motivating junior staff").

I then use a flipchart or whiteboard and stick the post-it notes up, trying to group together similar ideas or answers - irrespective of which original question they came from. This usually gives me 5 or 6 main themes which I can then organise the research findings on.

Before finalising the themes for the findings I'll do three things:

1. Firstly, I'll cross check my themes and map them back to the original interview or survey data just to make sure I haven't missed anything or overemphasised one area over another.
2. Secondly, I'll sleep on it and let the initial ideas I've come up with percolate. More often than not I'll come up with a new idea or refinement simply by relaxing and letting my subconscious mind go to work.
3. Thirdly, I'll often bounce the ideas off some of the interview participants who I thought were particularly insightful when I spoke to them. I'll either drop them an email or call them and see what they think of the initial findings and take their feedback into account.

By then I'll have enough to start work on creating a report or presentation from the findings.



PRESENTING YOUR RESULTS

Your authority is established by the quality of the insights from your research and your ability to communicate those ideas. So far we've covered doing the research and deriving the insights. Now you need to present that research to your target audience to build your authority and start winning more clients.

I recommend you start by writing a summary report for the research. This is something you can send to interviewees and survey respondents, use as a lead magnet, extract articles and blog posts from, and use as the foundation of a live presentation.



The best structure for the report is normally to base it on the main themes that have emerged from your research, one section per theme, plus an executive summary and conclusion and next steps and the end. Don't dwell on the methodology or the detailed answers to the questions, summarise them in appendix or footnote for those who want to check. But keep the body of the report focused on the findings and the insights you got from them.

To make each section more readable, try to get a balance between text and graphical representation of the data for that theme (e.g. a pie chart of the top priorities, a graph of the "what percentage..." answers, etc.). You can also break up the main text by adding direct quotes from the interview answers as pull quotes or in call out boxes.

Try to add in models to simplify and aid the understanding of the reader. For example, you might have identified that there are typically five stages of maturity different organisations go through in their implementation of the new leadership technique you've studied. So draw a model of the different stages showing what the characteristics are of organisations at each stage so readers can identify what stage their organisation is at and what they have to do next.

Creating a model can be as simple as naming the different elements which you've found to be important. The McKinsey 7S model that Tom Peters came up with in his research was simply a categorisation of the main factors he found that, when aligned, led to high performance in organisations: strategy, structure, systems, skills, styles, staff and shared values. Neil Rackham built a hugely successful training company on the back of SPIN Selling, an acronym (Situation, Problem, Implication, Needs-Payoff) taken from the different phases he identified in successful sales meetings.

Your executive summary should present the main themes and conclusions from the research, and entice readers to dive into the full report. The conclusions section should summarise and bring together the main findings from the report along with recommendations for action: what should the reader do next?

Before writing this section you need to think how your own products and services fit into the picture. In what ways can you help potential clients who read the report to implement what they've learned from it?

Can you advise them on the details of what to do next? Can you train them on how? Can you do it for them? Can you find other people to help them?

You need to figure out what a logical and low-risk next step would be for a potential client who's read the report and is interested in going further could do.

Should they call you for a free consultation or discussion? Do you have a low cost entry-level product that will get them going fast? Is there a diagnostic exercise you can come into their business and do to identify what they should prioritise?

Whatever the best next step is, recommend it at the end of the report.

Finally, try to get an introduction for the report from one of the interviewees or a well known figure in your target clients' field. Share the report and discuss it with them and ask if they'd be willing to write an introduction or short quote for the start of the report. A single paragraph is fine but will add an air of credibility to the report.

Ideally, you'll also be presenting the findings back live to your highest potential clients rather than just sending them a report. In this case, structure your presentation so that you present an overview of the main findings, then

ask the client which of the areas is the biggest issue for them and which they'd like you to go into more detail in.

Then depending on their answers, you can ask them further questions about why this is a particular issue for them, what they've tried already and what kind of results they're looking for, before diving into more details on that particular section.

In this way you've turned what could be a dry monologue into an interactive session that's highly relevant to a potential client, and you've found out from them what their biggest challenges are in an area you can help with. You've then demonstrated credibility in that area. In other words, you've successfully positioned yourself as an authority in an area where they're likely to need to hire someone.

The next step from there is to recap the issues the potential client shared, summarise the relevant findings from the research, then ask if they'd like you to come back for a more in depth discussion on how they might be able to address some of those issues. In other words, you've transitioned from an information sharing meeting to a sales meeting in a completely natural, non-pushy way.

After you've created a summary report and a live presentation, you can extract elements from the report for articles and blog posts for your own web site or for use as guest articles on other people's sites (with perhaps the offer of the full report as a lead magnet). You can also record an audio version of the report and a video version of the presentation (you voicing over the slides) if required.

And if your research uncovered surprising or controversial findings that would be considered newsworthy by potential clients you can use them for PR purposes too.

A good research report will give you so much new, unique material it can feed your content and social media marketing for many, many months.

YOUR NEXT STEPS

I hope you found the Authority Research Blueprint useful. Research projects can be hard work, but they're the most surefire way of establishing yourself as an authority in your field.



I recommend that you go back through this report with highlighter pen in hand, marking the areas where you need to focus yourself to get your research off the ground.

Then get to it.

I've laid out the steps you need to go through to do your research and to communicate it to your target clients. Now it's up to you to create your own research project and use it to become an authority in your field.

If you have any questions about this blueprint or on becoming seen as an authority, do drop me an email on ian@ianbrodie.com. I answer all my emails personally.

Best of luck,

- Ian Brodie



APPENDIX

Example Questions from my “Business Development for Law Firms” research.

Section A: The Importance of Business Development Skills for Lawyers

A1) How would you say the importance of selling skills for lawyers (the individual skills of legal staff to win new business) has changed over the last 2-3 years?

1. Significantly More Important
2. More Important
3. About the Same
4. Less Important
5. Significantly Less Important

A2) What would you say has caused this change (if any)?

A3) Do you foresee any upcoming changes – for example due to the new Legal Services Act?

Section B: Specific Business Development Skills

B1) Please look at the following list of selling skills and separate out those which are critical for lawyers to develop from those which are "nice to have".

From the critical list, please rank the top 3 skills needed.

1. Cold calling (where allowed)
2. Networking
3. Public Speaking
4. Article Writing
5. Blogging/On-line Networking
6. Sales Meetings: Positioning the Firm & Credibility Building
7. Sales Meetings: Questioning & Understanding Client Needs
8. Rapport Building & Interpersonal Communication Skills

9. Proposal Writing
10. Presentations/Pitches
11. Client Relationship Development
12. Referral Generation
13. Cross-Selling
14. Opportunity Assessment, Qualification & Pipeline Management
15. Planning & Organisation
16. Other (please specify)

B2) For the top 3 skills, please answer the following questions:

What do you mean by the skill?

Why is it so important?

What are the major challenges lawyers face trying to develop this skill?

Section C: Developing Skills in Lawyers

C1) What methods do you believe are critical to developing the skills you have identified:

1. "Learning by doing"
2. On the Job Coaching
3. Mentoring from an Experienced Senior Practitioner
4. Formal Training
5. Peer Group Support & Experience Sharing
6. Including Selling Skills in Formalised Competency Models and Career Paths
7. Other (please specify)

Notes:

C2) Which of the above methods do you already have in place operating effectively in your firm?

Section D: Measurement and Culture

D1) Does your firm have any performance measures in place to measure how effective staff are at selling – in particular, any measures over and above actual sales?

D2) Would you say your firm has a helpful culture or mindset towards selling and business development?

Yes / No

What aspects of the culture are particularly helpful/unhelpful in supporting the development of selling skills?

What steps might be useful in building (or continuing to build) a positive business development culture?