Needs Assessment Framework

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How to use this framework

The pace of market research continues to quicken, and with it, the need to somehow keep up with industry innovations. With over 1700 research technology solutions available, it's easy to find yourself with tools that don't deliver value, teams frustrated by solutions that don't align with their needs, and confusion about which tools to use for which projects.

The MRXplorer Needs Assessment Framework will walk you through evaluating your team's needs against your current tech solutions and identifying gaps, redundancies, and misalignments, with clear prioritization on which to tackle first.

The framework focuses on five key areas that will help you understand where your market research technology is supporting your business needs and where it's falling short:

1. Usage - How your tools are being used across projects and teams
2. Experience - How the tools are used and how users feel about their efficacy
3. Scalability - How well your tools can grow with your needs
4. Interoperability - How well your tools work together
5. Coverage - Where your tools provide unique value or duplicate functionality

Whether you're looking at optimizing your tech budget or deciding whether to add a new solution to your restech stack, this framework will get you started.

Step 1: Define business objectives (1 week)

Activities:
- Conduct interviews with research teams and stakeholders
- Map research activities to business decision cycles
- Document pain points in current processes

Include the following interview questions:
- What business questions and teams does your organization support throughout the year?
- What is the overall organization's business decision cadence?
- What are your stakeholders asking about how you conduct market research?
- Are there specific pain points or inefficiencies in your current processes?
- What future needs or scalability considerations do you foresee?
- What priority would you assign each business need or objective?

Outcome: A clear list of prioritized business objectives to anchor the assessment.

Best Practice: For large insights teams split into sub-groups, interview each group to get a holistic view. For smaller teams, try to interview each person individually. Include senior stakeholders who receive research outputs to understand their expectations.

Step 2: Inventory your existing tools (1 week)

Activities:
- Create a detailed catalog of all research tools currently in use
- Document key information about each tool:
    - Vendor information and relationship history
    - Contract terms and renewal dates
    - Primary users and ownership
    - Projects supported
    - Cost and licensing structure
    - Key capabilities
    - Security and compliance gaps identified by IT and Legal teams

Outcome: A comprehensive inventory highlighting the current state of your tech ecosystem.

Best Practice: Use the template found on the MRXplorer website to collect this information. Share this across your team to collaborate on the list, then deliver it to your finance, procurement, and operations colleagues for review.

Step 3: Assess tool performance (2 weeks)

Process: Create an assessment form to collect data from team members on their experience with each tool.

1. Usage
   a. Frequency of use across projects and teams
   b. If on a subscription, subscription rundown rate

2. Experience
   a. Usability and user interface quality
   b. Learning curve and training requirements
   c. Vendor support frequency and quality

3. Scalability
   a. Ability to handle increasing data and project volume
   b. Adaptability to new research methodologies
   c. Future-proofing capabilities (AI readiness, etc.)

4. Interoperability Assessment
   a. Data compatibility with other systems
   b. Workflow integration across research processes

5. Coverage Assessment
   a. Capabilities provided - highlight those that are unique to this tool
   b. Gaps - what team members wish the tool would do

Outcome: A detailed performance assessment for each tool across all five areas.

Best Practice: Always ask for specific examples where tools succeeded or failed to meet expectations. Follow up on low scores with qualitative discussions to uncover root causes if they're not apparent.

Step 4: Gap analysis and prioritization (1-2 weeks)

Activities:
- Map technologies to business objectives
- Identify gaps, redundancies, and misalignments
- Prioritize issues based on business impact

Actionable Steps:
- Create a matrix mapping business objectives to supporting technologies
- Rate how well each technology fulfills its intended purpose
- Identify high-priority objectives with inadequate technological support
- Flag tools with significant overlap or redundancy
- Highlight tools with critical experience or interoperability issues
- Prioritize gaps and issues based on business impact and urgency

Outcome: A prioritized list of technology gaps, redundancies, and misalignments.

Best Practice: Be aware of organizational politics in this process. Some tools may be in use because a stakeholder specifically requested them. Emphasize that this is an analysis phase, not an immediate decision point, to allay fears about abrupt changes or data loss.

Step 5: Develop recommendations (1 week)

Activities:
- Synthesize findings into actionable recommendations
- Organize recommendations by priority
- Include benefit for acting on each recommendation (ROI - cost or time)

Recommendation components:
- Key insights from the assessment
- Tools that should be retained and why
    - Current and continuing benefits
- Tools to consider replacing or eliminating and why
    - Benefits of replacing or eliminating technology
- Gaps that could be addressed with new technology solutions
    - Benefits of adding new technology solutions
- Preliminary requirements for new or replacement tools
- Implementation considerations, including change management needs
- Estimated timeline and resource requirements

Outcome: A clear action plan for optimizing your market research technology stack.

Best Practice: Socialize recommendations among the team to keep everyone informed and gather additional input. Be sure to consider the impact on ongoing projects when generating the recommendations and planning implementation timing. Highlight potential quick wins alongside longer-term strategic changes.

Next steps

Upon completion of this assessment, your organization will have a living inventory document that can now be more easily updated on a regular basis. Reviewing this as part of your team's business cadence once or twice a year is recommended for keeping it current.

You can also consider these next steps.

1. Proceed to the MRXplorer Technology Evaluation service for assistance evaluating and selecting specific tools to address identified opportunities.
2. Engage the MRXplorer Implementation and Change Management service to help transition teams to new tools or processes.
3. Develop an in-house action plan using the assessment recommendations as a roadmap.

The MRXplorer Needs Assessment typically takes 4-6 weeks depending on the size of your research team and technology stack. Custom assessment timelines are available for urgent situations or particularly complex environments.