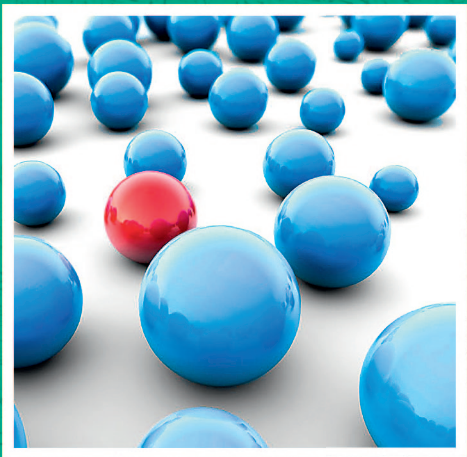
Checklist

FOR MANAGING A RESEARCH PROJECT



EphMRA

European Pharmaceutical Market Research Association

Introduction

Welcome to the updated publication – Checklist for Managing a Research Project.

This publication has been completely reviewed (it was last published in 2005) and is intended to be a handy guide for those commissioning both primary and secondary market research projects. The Syndicated Data Committee has provided the section on page 6 entitled ***Selecting a supplier of secondary data – what you should particularly consider.***

We hope you will find this a welcome companion.

Many thanks in advance,

EphMRA Primary Research Methods & Training Committee (PRM&T)

Defining Information Needs Internally

- Be clear why the information is required and what decisions will be made
- Review existing sources of relevant information if any
- Identify information gaps to be addressed and redefine information needs if required
- Give some thought to which methodology might be appropriate
- Be clear on the budget available for the project.

Preparing a Shortlist of Suppliers

- Look for suppliers with relevant experience (in therapy area and methodological needs)
- What has been your colleagues personal experience with the supplier
- Check any internal Preferred Supplier lists
- Creativity
- Involve key people in the choice
- Agree who to involve in the briefing
- Inform relevant parties that research will be conducted
- Send brief to at least 3 suppliers
- Check confidentiality agreements/any possible conflicts of interest.

Writing the Brief

The client is responsible for providing the following information either orally or in writing:

- Overall objectives, both marketing and research
- The business decision that will be made on the basis of the research
- How the research will be used
- Background information: therapeutic area, brand and marketing
- Target countries
- Target groups e.g. doctors, patients, payers etc.
- Any recruitment criteria which might apply e.g. target doctors, and any constraints
- Which methodologies thought appropriate
- Level of involvement of local subsidiary companies e.g. checking
- Internal procedures and time required to sign off translations
- Whether or not and who attending fieldwork
- Any preferences for local fieldwork suppliers
- Briefing preferences: central, telephone
- Deadlines for the proposal , when the decision to commission will be made and project results
- Main and secondary contact
- Deliverables required e.g. tables, report, presentation
- Broad idea of budget
- How many suppliers asked to pitch
- Be clear on the key selection criteria for the successful proposal.

The Proposal

The client should agree with the supplier the form and style of the proposal required (ie Word, PPT, via email, post, in person). The supplier should include the following in the proposal:

- Restate objectives, including any changes to the brief as a result of discussion
- Proposed methodology and reason for choice
- Limitations of the research design, if any
- Detailed time plan
- Client responsibilities e.g. supply of stimulus material, liaison with local subsidiaries, supply of sample lists if relevant, translation checks
- Project team and the relevant experience of the key personnel
- Proposed fieldwork suppliers
- Moderators in each country and their relevant experience (for qualitative studies)
- Use of freelancers
- Sample size, composition and recommended recruitment criteria
- Deliverables: Format in which the data is to be delivered, e.g. tables, data files, databases, PPT, electronic copies
- Costs using the client company template if required and likely costs of optional elements e.g. personal briefing meetings, viewing and simultaneous translation facilities, country specific reports, extra meetings
- Codes of Conduct adhered to, training in Code of Conduct which relevant personnel have undertaken (eg any EphMRA Code of Conduct training courses)
- Payment details/invoice schedule
- Terms and conditions of business

Selecting the Supplier

- Involve all decision-makers
- Compare and contrast proposals
- Highlight how each proposal has met the selection criteria
- Ensure you get back to suppliers if clarification/modification required

Selecting a supplier of secondary data – what you should particularly consider.

From the Syndicated Data Committee

When choosing an agency or supplier of secondary research / data, there is typically much less choice open to you than when selecting an agency or supplier of primary research. This is owing to the fact that there are far fewer providers of secondary than primary research. However, it is still extremely important to make an informed decision and to select your supplier carefully.

The list below and on the next page aims to provide you with some points of consideration for your discussions with suppliers of secondary data:

- Which markets are covered?
- What is the data collection methodology used? This could include:
  - pharmacy (retail or hospital) or wholesaler sales/purchases
  - hospital consumption
  - patient self-reported
  - physician recorded
- What is the sample size and how representative is this?

Selecting the Supplier

- How consistent is the data provision (and data collection methodology) across the markets covered? This will help you to understand how comparable the data are across markets. If not comparable, this can impact the conclusions you can draw
- Time needed for provision of the data (time between data collection and delivery)
- Does the data represent all relevant customer groups within the market/therapy area?
- What time period does the data cover (number of months, quarters, years...) and how much back-data is included?
- How are back-data changes handled?
- Which variables are included- dependent upon type of data sought (sales, prescription etc.). These could include:
    - units
    - value sales - in which currency (local, US$, € etc.) and at what price level
    - patient / procedure numbers
    - product (local, international brand name)
    - pack
    - manufacturer
    - parallel imports
    - prescription status (reimbursed/non-reimbursed)
- For sales data, what is the source of the pricing information used?
- Options available for accessing and using the data (online, Excel, in-house database/system that will require installation, PowerPoint charts etc.)?
- Is the data projected and if so, what is the methodology for this?
- Extent of / number of hours of analyst and customer service support available to you.
- Cost
- Conditions regarding further use of the data (for external reporting etc.)

Code of Conduct Adherence

- All parties engaged in the market research study – the commissioning company, the market research agency and any sub-contractors must adhere to the EphMRA Code of Conduct
- EphMRA's Code of Conduct complements other professional codes of conduct/practice (ICC/ESOMAR, CASRO, EFPIA)
- Local/national Codes of Conduct must be observed
- US suppliers of secondary data should participate in the Safe Harbor Program
- Confirm all relevant parties must be aware of adverse events training and reporting procedures
- Clients must sign the appropriate and relevant disclaimers whilst viewing interviews/group discussions
- Market research must not be used to influence the attitudes or behaviour of respondents. It must not be used for the direct purposes of promotion or selling.

After The Decision

- In a timely manner, feedback to all suppliers who submitted a proposal and give clear and detailed feedback as to why they were not successful, citing the selection criteria.

Project Acceptance

- Remember to get budget authorisation for the project
- Initiate Purchase Order internally and let the supplier know how long it will take to issue/who will issue
- The client should accept the project verbally and then in writing/ via email, confirming the total cost, and specifying details of any options included in the proposal e.g. sample size, countries etc.
- If there are any material changes to the proposal document these should also be specified.

Initial Project Kick-off Meeting

- Can be done either in person or by TC
- Review country/sample specifications
- Review research objectives and information needs
- Review timings and align feedback with any internal deadlines
- Ask about quality procedures
- Establish how you would like to work with the Supplier
- Client responsibility to prepare concepts and other stimulus material required for testing
- The client needs to approve all field documentation (screeners, guides, questionnaires, stimulus, worksheets)
- The client should inform the agency as early as possible of their intention to attend fieldwork, so that provision can be made
- If attending fieldwork, the client must be familiar with the prevailing Code of Conduct, relating to their involvement, especially the declaration of their position to the respondent, and the respondents right to anonymity
- The agency should provide regular updates on the progress of fieldwork and notify the client of any time delays, and reasons e.g. recruitment problems, late delivery of interview material, delay in acquiring sample lists etc.
- Clarify data entry/analysis procedures including data editing and cleaning on quantitative projects and depth of analysis for qualitative projects.

Understanding how Suppliers work with Fieldwork Suppliers

- Ensure client is fully aware of the field agencies used on projects
- Provide background on the field agency and any biographies of moderators/interviewers where necessary
- Confirm that all field agencies abide by the Codes of Conduct, utilise the appropriate disclaimers and have been trained in Adverse Events Reporting
- Confirm that field agencies are responsible for safe archiving of all fieldwork materials and interviews.

Suppliers working with Other Suppliers – Best Practice

If you are working with other suppliers to undertake for example fieldwork for a project the following is recommended as best practice:

Often suppliers are asked to give a quote for your project based on project requirements identified at the proposal stage. If these requirements subsequently change:

- Inform fieldwork suppliers in a timely manner and assess if there will be any impact on costs or timing
- Maintain screening criteria and screening documents in line with what has been agreed and discuss any changes in requirements with the supplier
- Maintain interview materials and documents in line with what has been agreed and discuss any changes in requirements with the supplier.

Reporting the Results

- The client should let the agency know how many days are needed to review the presentation prior being given
- The supplier should be informed of all personnel attending, their responsibilities, and any particular issues which might be raised
- Agree length of time required for presentation of findings and whether material to be circulated prior to presentation
- Ensure appropriate equipment is available.

Review the project with the Supplier

- After the presentation and/or delivery of the report, there should be a discussion between the supplier and the client to review the project
- Where relevant a project evaluation questionnaire should be completed and returned to the supplier
- Agree what follow-up is required with both the agency and internal clients.

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