

IPSOS TALKS

Engaging Conversations with Insights Industry Leaders



Can Insights Professionals Think Like Strategists and Creatives? And Should They?



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The Interview



Lauren Demar

“Thanks to both of you for participating in this discussion today. Your individual backgrounds provide unique perspectives on this topic. As background, we are seeing a lot of transformation in how our clients’ Insights teams are working today. They are working with a broader cross-section of internal stakeholders, often beyond Marketing, and are therefore helping to address a broader array of business questions. One of the questions we are hearing more from clients is how to evolve the skillsets of their teams and get them to think about approaching business problems differently. Let’s start by talking about how an Insights professional approaches a business problem vs. how a Consultant would approach it.”



Oscar Yuan

“Insights professionals often approach business questions with a clean slate. “I don’t know anything, so let’s put together an approach that addresses the question via research/social intelligence/etc.”

A Consultant will instead ask the source of the question, then will formulate a hypothesis on what they think is happening, and will think about it from their own experiences and point of view as well—all before they design a test. While not one approach is better than the other, the consulting approach starts somewhere, so you’re one step ahead in the game vs. starting from that pristine “clean” place.”



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Lauren Demar: You’re saying Insights professionals take a greenfield approach vs. a Consultant who goes further, comes up with hypotheses. But where do the hypotheses come from?

Oscar Yuan: Part of the Consultant task is to always be observing and critically thinking. Constantly reading, absorbing, having opinions based on constantly gathering input. That’s a skill that Insights professionals need to build: bringing opinions and strong POVs to the table, rather than simply presenting the data and letting the data do the talking.

Lauren Demar: Consultants are also known for looking both inside and outside for inspiration. Please talk about that.



Rachel Rodgers

“If I think about how a Creative would address a business challenge—and by “Creative” I mean those in creative roles like advertising, design, etc.—creative thinking is generally idea-led. Not dissimilar from where a Strategist would be, as Oscar mentioned. Creatives look to get quickly to a solution by bringing in hypotheses, consuming different influences from culture and the world. They solve problems by looking for an idea. The best ideas stem from “colliding” a brand benefit or equity with something happening in the world more broadly. Creatives are constantly trying to cause collisions between what is happening in the outside world and their brands. That’s the essence of creative thinking.”

Oscar Yuan: I love the word “collide.” That’s critical if we are going to build creative strategic thinkers in Insights. That collision is where new things happen. I think we spend too much time looking for alignment, when we should be looking for collisions. That’s where the interesting insights are – at those tension points.

Lauren Demar: Interesting. As Insights professionals we have historically looked for consistency and patterns. When I hear the term “collide” it’s more about developing inspiration for a fresh idea.

Rachel Rodgers: Exactly. Searching for disruption.

Lauren Demar: The typical Insights orientation is so different. How do you get Insights professionals to shift their approach and thinking?

Rachel Rodgers: I think it can be taught. There are many frameworks and thinking techniques that can help people, especially those who have an aptitude. A very simple framework is two overlapping circles. The first circle contains something about your brand that you want to communicate. E.g., the ingredients in a Snickers bar make it a very satisfying snack. In the second circle you capture an insight that is relevant to the brand, e.g., people get “hangry.” The overlap is the collision zone. You get an idea that Snickers can own – ‘You’re not you when you’re hungry!’. Of course the quality of what goes into those two circles is also what counts.

Oscar Yuan: Consultants spend a lot of time looking internally at the company, at information that is already available, understanding strategy. But they also look outside (which is different than a lot of Insights people)—looking at what the competition is doing well, what is happening in society, etc. And you could say that they also look sideways, what are adjacencies, other companies in nearby industries doing? For example, if I’m looking at rental cars, I’d also look at car sharing models, buses, trains, and other transportation for inspiration. Taking that broad view and then being able to see how it applies.

Oscar Yuan: Like everything, it takes practice. We’re not used to challenging Insights people in this way. I often tell people on my team to stop their work, to consider what they expect in terms of an outcome, where do they THINK things are going, given what they know. Let’s start there. With interviewees I’ll often ask them what they read last week. Because it’s an interview people will tell me what they read in the Economist or WSJ, but I’d also like to hear what they saw in People magazine. Both matter, business/science and culture. Macroeconomic trade policy is pointless if you don’t understand how people buy things when they walk into 7-11. You can push people to practice this. The next step is connecting what you’ve seen and learned from these disparate data sources, training people to think that way.

Rachel Rodgers: While it’s fun to think about turning Insights people into Creatives, equally valuable is to make them empathetic to the creative and strategic processes. One key step is to turn research from information gathering to insights hypothesizing. Also understanding what Creatives need to succeed and providing them with that. Not asking your team member to become a Brooklyn hipster, but asking them to understand what that hipster needs.

Oscar Yuan: That’s right, Rachel. We don’t want everyone to think the same, we want independent Insights people, Creatives, and Strategists. We just need them to develop a deeper level of understanding across the roles. The cellist isn’t going to be as good



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at basketball as the basketball player, but they can both learn enough about one another's roles so that they can communicate better.

Lauren Demar: Do you think this need for Insights teams to evolve is more important now than in the past?

Oscar Yuan: The most successful businesses are doing this, becoming more and more integrated. Product Designers are working with Engineers at Apple. Holistic medicine is drawing people together in new ways. The movement in business is towards fluid and integrated organizations. It requires specialists across disciplines to communicate and understand each other.

Rachel Rodgers: It helps to be aware of where the creative thinking needs to happen in the value chain, where it will be most impactful. This varies by category. In mature categories, like most CPG companies, ideation in marketing is especially crucial. You aren't going to find an attribute in your frozen dinner that is unique and defensible from competitor attributes. You need to find higher level emotional ideas or purpose-driven ideas. E.g., Dove is a great example of a brand that learned this early. What's in the packages across the board of their categories is generally the same. They elevated the conversation to a focus on women's self-perception and real beauty. Dove contextualized what they did in a broad way that had a major impact on the category. If you're talking about a tech-driven brand, let's say an online car retailing app, creative innovation occurs in the service concept itself.

Lauren Demar: Interesting. So we're agreeing that Insights skillsets need to evolve, because they're being asked to work differently, with different internal teams, and to address more difficult business challenges like the Dove marketing example. If we think about the Insights industry moving forward, what are the greatest emerging needs and skills?

Oscar Yuan: Number one, as we've touched on a bit, is the ability to have a point of view and to persuade others regarding that view. Insights professionals rely on the data to tell the story. These days there is so much data, and frankly so much conflicting data. We had a client that asked if they should quit advertising on a particular media channel. It turns out that 62% of people do not trust that channel. So is the value of ads lower than what they cost? The "fact" is that 62%, but what do we do with that? In an of itself, 62% of people not trusting a media channel is not meaningful. What to do with that fact is having a view, and then convincing stakeholders to believe in and act on that view is persuasion. The power and importance of persuasion skills cannot be understated.

Lauren Demar: You're right, Oscar, there's no shortage of data for our clients. Complicating the issue further is that management can go to various parts of their organizations for data and answers. Where is the one source of truth?

Oscar Yuan: Exactly, and how do you pull those pieces together into a story? This is a space where Insights should take a leadership role in the future, in fact if they

don't it will be a huge missed opportunity. Who better than Insights teams to bring the pieces together from across the organization and tell the visionary story? Who understands the consumer better?

Rachel Rodgers: It's about synthesis as a skill, then coming to the place of recommendation.

Lauren Demar: But you can integrate and weave together a story and still not persuade. How do we get Insights people to be more persuasive?

Rachel Rodgers: By constructing a story that brings your audience along with you. That knocks down objections as you go along the story journey. You may not want people to believe that you have a pre-existing bias—that's part of the skill. Stakeholders and management want fact-based guidance and open minds, but Insights people need to communicate that they've reached a recommendation based on the journey.

Lauren Demar: Insights professionals think that they have to persuade purely based on data. Data is a proof point, but there are other proof points that aren't about data. What other companies have done, cultural knowledge, those sorts of additional context.

Oscar Yuan: You're right, Lauren. You can find a lot of commentary re: the anatomy of a successful Ted Talk that is relevant to our industry when it comes to being compelling and persuasive. There always needs to be a base of science or data, but beyond that the most persuasive talks prime the audience for the message, incorporate personal anecdotes, infuse humor, and exhibit authenticity and passion. Human brains are wired to think in terms of narratives. Start the story with historic or cultural context beyond the data to engage people right away, leave "we interviewed 500 people aged 18-64" for the appendix. For a recommendation to stick, we need people to join us on the story path. And keep it simple so the story stays crisp. You want people to be nodding their heads at the end.

Lauren Demar: What do you think will be the most difficult transformation element for Insights organizations?

Oscar Yuan: Moving from a present or past-based view to a forward-looking view will be difficult. By definition, questions we have asked are the past. Even if we fielded the survey yesterday, it has already happened. We are comfortable looking at data from the past, and sometimes drawing a straight line between two points into the future. But COVID taught us that those two dots and the line that connects them does not predict the future. Clients need a future view informed by, but not based on, the past. It's about foresight. It requires a willingness to be wrong and comfort with scenario planning. It's not about being right, it's about being prepared. Outlining three paths that the future could take, let's look at implications of each. Insights people are focused on accuracy, and we need to let that go in some instances.

Lauren Demar: The head of Insights at a Fortune 50 company told me the other day, "It's better to be directionally right than precisely wrong."



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It's about evolving to be a source of inspiration, and helping stakeholders along the journey.

Oscar Yuan: Yes! We have to be comfortable being somewhat right, then we'll have incremental learning to inform as we go along. We don't want to be the person or industry that stops because we are afraid to predict.

Lauren Demar: Another challenge is how Insights leaders are going to redefine the role of their organizations moving forward.

Rachel Rodgers: It requires being clear about what the Insights department brings versus other areas of the organization. There will be a lot of insecurity regarding this transition. Insights professionals, if they add some of the skills we are talking about today, can be some of the most powerful people in the organization, incredibly effective individuals. Stretching across innovation, new product development, marketing, etc., and underpinning their perspective with the factual analysis across the disciplines.

Oscar Yuan: No one is more valuable to an organization than the one that knows what customers are thinking. That person should be sitting next to the CEO all day.

Rachel Rodgers: And sharing the implications, "what this means for you CEO."

Lauren Demar: There is also the notion of Insights organizations serving as provocateurs, acting as a catalyst vs. only serving the role of providing "the answer". It's about evolving to be a source of inspiration, and helping stakeholders along the journey.

Oscar Yuan: I couldn't agree more, 80% of what Insights teams do now is give answers. The reverse is the future. There will always be a need for answers, how many people bought our product, etc. But the answers are getting easier and easier to gather. Let's flip so 80% of our time is being spent inspiring.

Lauren Demar: What have the best Strategists and Creatives that you've worked with done particularly well?

Oscar Yuan: The best Strategists can take wildly disparate things and cleverly weave them together. They see the connections. E.g. you can do a great pricing study and say "the price should be \$x," but the best strategists will bring in a view beyond that data, perhaps based in behavioral science for example, "if we see this price in isolation, consumers will do this. However, if they see this price, relative to this price, for a size slightly larger, they will be willing to spend more." The more that we can loop in broader Human Sciences, in the context of humanities, social science, etc., the stronger we will be. It's about understanding humans and their needs, not about "consumers" or "shoppers" or any particular number. It's one of the ways that Ipsos leverages our Behavioral Science team, leveraging that alternate viewpoint can have a profound impact.

Rachel Rodgers: Back to the idea of colliding, these collisions have potential to explode business opportunities. For example, DeBeers diamonds. They had a problem, so many tiny diamonds. These diamonds weren't large enough to place in

engagement rings, there was no market for this excess stock. Creative thinkers took that business problem. They saw that diamonds were traditionally associated with the "achievement" of marriage. Take that achievement thought and collide it with a broader recognition that women have many achievements beyond marriage. This led to the idea of The Right Hand Ring. Now women buy diamonds for their own right hand as a mark of less conventional achievements. It's a great example of Creatives colliding a business question with a cultural insight about women, resulting in an idea that benefited the company. Today, if you Google Right Hand Ring, you will see many examples of beautiful designs with small diamonds.

Lauren Demar: That's a great example. Wrapping up, what tangible next steps might Insights leaders want to try regarding this topic?

Rachel Rodgers: A great first step would be to get Insights, Strategists and Creatives from your company and partner organizations together. Ask them to present to each other and talk to each other. Another idea is to facilitate a conversation internally about how to address business issues from different angles. Ipsos has framework tools and facilitation capabilities to help here, for those that may be interested.

Oscar Yuan: And Insights leaders need to remember that making their team feel uncomfortable is good. If people say it makes them uncomfortable it's a sign that they are growing, whether it's forcing people to give a pseudo Ted Talk or asking them to bring in something beyond the data to a story. Push for trying new things on an ongoing basis, otherwise we all fall back to our old comfortable ways.

Lauren Demar: Great ideas. Clients could also, when new business questions come in, practice putting on different hats, Insights, Creative, External Consultant, etc., and consider how each would approach and think through the questions. Push people to give intentional provocation.

Oscar Yuan: A great place to start would be asking the Insights team, "If you had to answer this question without any data, what would you say?"

Rachel Rodgers: That's right, to Oscar's earlier point, also jump right to asking "What are three possible scenarios here? What are our ongoing hypotheses?"

Oscar Yuan: And look for tensions that can be built in to your system. Think about how Marketing is always pushing against Finance, Product Development vs. Marketing at tech companies. These tensions, although sometimes uncomfortable, often result in great outcomes.

Lauren Demar: Thank you both. Fantastic discussion and great advice. It's an interesting time in our industry, a time of change and transformation. Thinking about how to approach business challenges through different lenses will allow Insights professionals to bring more value to their organizations and build their skills along the way.

The BIOS



Lauren Demar is the Global Chief Growth Officer for Ipsos. In her role, Lauren leads our local client organizations in 45 countries with the goal of partnering with our clients to enable their growth. She is a member of the Ipsos Management Board Executive Committee and the Insights Association Board of Directors.



As the CEO and President of Ipsos Strategy3—Ipsos' marketing, brand and innovation consultancy—Oscar Yuan leads a team across 16 countries to ensure that clients are fully leveraging the power of insights in their marketing and business strategies. A management consultant by training, Oscar is an active Ipsos Partner, serving as an executive advisor for many of the world's top organizations. Oscar holds an MBA from Harvard Business School and two undergraduate degrees from Stanford University.



Rachel Rodgers is a Senior Vice President in the Creative Excellence service line at Ipsos, where she is responsible for the advertising strategy practice. She has spent much of her career as an advertising and marcoms strategist, with extensive experience developing brand positioning and communications solutions in advertising agencies and for brand owners.