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Infomineo Academy

Lesson 3: The Execution Phase

The Research Process

Intake

Execution

Delivery

Why is execution important?

Execution is the process of implementing the approach identified during intake. The data gathered during this process will help you later with generating insights that answer the main business question.

To explore available data and identify data limitations

To test and update the approach/es as you progress in the research, keeping the main research objective in mind

To identify new data/insights that could add more depth to the original research question

How should you structure your execution phase?

The execution phase includes the majority of the research work and allows the researcher to apply his research skills and techniques with the main objective of answering the business question. The execution phase should include the following steps:

Continuous feedback loop with end user

1

Identifying and gathering all relevant data from the different sources:

- Testing/probing the methodologies and sources that were identified during intake
- Thinking of alternative sources and refining the approach, if the required data is not found (keeping the research's main objective in mind in order not to drift away from it)

2

Aggregating the captured data and making sure that your research findings meets the following criteria:

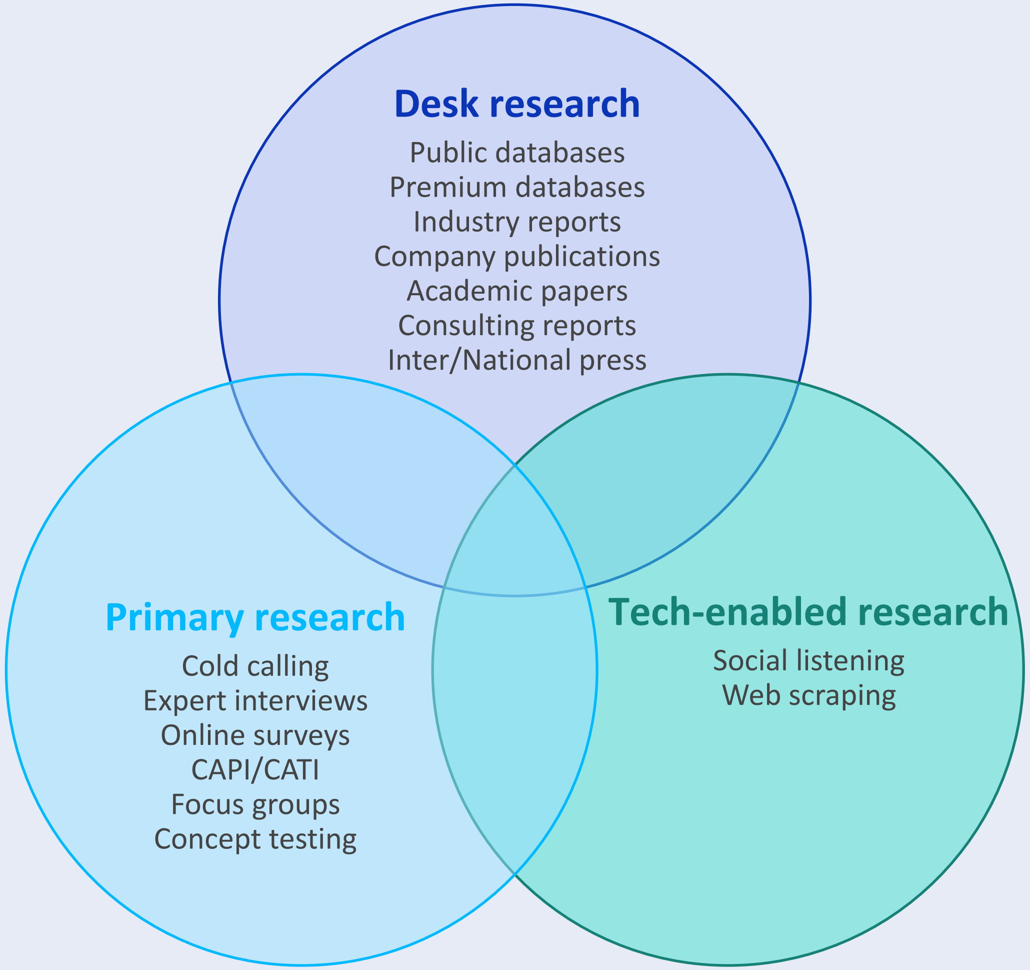
- Data is consistent and validated from different sources (need to verify any inconsistency or data outliers)
- Data is comprehensive (includes the required quantitative/qualitative data needed for the specific research question)

3

Analyzing the captured data and identifying limitations:

- Checking the data for any inconsistencies
- Making any relevant calculations
- Comparing data across different sources
- Identifying patterns in the data captured

How can you identify and aggregate data?



How leveraging multiple sources and tools can help you in executing the research:

- **Flexibility and problem solving**: In case the approaches identified during intake did not yield the expected results
- **Validate**: In case data doesn't make sense or varies across different sources
- **Complement**: To explain data variation and provide context
- **Triangulate**: In case the data is very limited, and you need to get a proxy or sense of direction

Illustration of the execution phase for a project (1/2)

Research project: “Organizing for Growth: How the Fortune 200 are covering the world”

Using the same example as the intake phase, with the objective of assessing and mapping how large companies' decision-making processes are organized across the globe, we followed the steps below during the execution phase:

Validating research approach

- Implemented the three suggested approaches during intake and gathering the relevant data found on the identified sources
- Started with a sample of companies to be validate and refine the approach as well as establish a base speed to inform a timeline that makes sense

Identifying and gathering data

To identify whether each of the top 200 companies selected has a regional/sub-regional HQ, we followed the steps below:

1. Searched through company publications: regional locations stated on the website; announcements; annual reports
2. Conducted a press search: Looking for announcements of job openings or citing a regional presence, using keywords such as: ("Regional headquarter“, “Regional office”, “RHQ”, etc.) or an indication of a management level professional overlooking the region
3. Leveraged LinkedIn: search for existing senior management roles (head or any equivalent title), with a regional scope of responsibilities. To identify relevant profiles, we used specific functions as filters and searched for regions as keywords. The search string would look like this: ("general manager" OR "head of" OR "CEO" OR "COO" OR "VP" OR “President” OR “Director”, etc.) AND (“Asia pacific” OR “APAC” OR “Europe” OR “Africa" OR “Middle East" OR "ME" OR "MEA" OR "MENA" OR "EMEA“, etc.)

Illustration of the execution phase for a project (2/2)

Research project: “Organizing for Growth: How the Fortune 200 are covering the world”

Using the same example as the intake phase, with the objective of assessing and mapping how large companies' decision-making processes are organized across the globe, we followed the steps below during the execution phase:

Aggregating data

- Included the top 200 companies in rows, and added columns for each company’s country of origin, sector, and industry
- Added columns for all regions and sub-regions that indicate the identified RHQ/SRHQ location
- An additional column was included only for comments for example: if a data point needed to be validated, or if certain similarities/discrepancies were identified in the data to help us with data synthesis, and analysis

Analyzing data

- Analyzed the data extracted for each company and went through the notes to compare data among companies, identify any relationships or patterns among data points, detect any outliers, and resolve any discrepancies or outliers
- Classified the companies’ regional presence as either an RHQ or SRHQ, depending on the level of decision-making and the geographies covered by the office, based on the criteria below:

Regional Headquarter (RHQ)

- An RHQ is explicitly mentioned in a public source
- A cluster of management level positions with strategic decision-making responsibility are based in a certain location
- A large coverage of a cluster of regions such as: EMEA, Americas, APAC, etc.

Sub-regional Headquarter (SRHQ)

- An SRHQ is explicitly mentioned in a public source
- SRHQs have limited decision making responsibilities confined to specific areas such as marketing or HR
- An SRHQ can be identified if it is only responsible for part of a region already covered by a larger RHQ

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