

Infomineo Academy

Lesson 2: The Intake Phase



Why should you focus on intake?

Intake is the process of fully understanding the assignment at hand. It involves defining the content of the ask, the general process to be followed, the time budget to be spent, and the expected format of the deliverable.



To align the expectations
on the final results
together with the end user



To be organized and
structured during the
process



To be efficient and deliver
the needed results within
the planned time budget

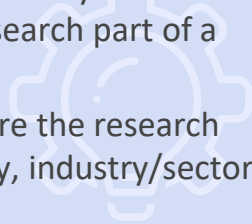
How should you structure your intake phase?

The intake phase serves as a guideline for the researcher to organize his thoughts and structure the tasks to start the research process. The intake phase should be structured as follows:

1

Understand the research context by asking the right questions. These questions should clarify:

- **Research objective:** Why are you conducting this research? What are you aiming to achieve?
- **Research context:** Who is the end user of the research? How would they make use of its findings? Is this research part of a larger project?
- **Research scope:** What are the research parameters? (Geography, industry/sector, timeframe)



2

Identify the type of data that can answer the initial question:

Quantitative data:

- Macro data
- Industry specific data
- Company specific data

Qualitative data:

- Trends/perceptions/Opinions
- News



3

Outline the research methodology:

- Identify a list of possible reliable sources
- Assess and validate the time needed
- Align with the end user on the approach and timeline
- Define the type of output needed (e.g. Excel file, PPT slides, Word document)



Intake checklist



Content

- ✓ Is the research objective clear?
 - ✓ Are the data needs understood?
 - ✓ Are the ambiguities clarified?
 - ✓ Which geography (region/country)?
-



Approach and deliverable

- ✓ Is the research feasible?
 - ✓ Do I foresee limitations/constraints?
 - ✓ What would be the best approach(es) to obtain this data?
 - ✓ What type of format(s) would be best to present this data?
-



Priorities and timeline

- ✓ What is the priority in terms of tasks/data points?
 - ✓ What is the expected timeline?
-

Illustration of the intake phase for a project



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

We’re aiming to understand the operations of large companies globally. The **overall objective** is to assess and map how the decision-making process in large companies is organized across the globe.

Scoping & clarifications

- Identify the regions of interest
- Definition of large companies and number of companies to be covered
- Industry specific or general

Type of data

- A list of the global companies
- Locations of large companies
- Qualitative information (e.g. examples of how companies choose the location of their RHQ)

Approach

- Extract the Fortune Global 500 (2019 revenue ranking)
- Research the top 200’s regional HQs through:
 - Company publications (e.g. website, annual report)
 - Press search
 - LinkedIn search

Timeline & Deliverable

- The project’s duration is 5 weeks (dedicating around 1 hour per company)
- PowerPoint Slides and an Excel backup file



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