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Developing the Creative Groundwork for Building Insight-Provoking Tools

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Buffalo State
State University of New York
Department of Creative Studies

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A Project in
Creative Studies

by

Janese Evans

Submitted in Partial Fulfillment
of the Requirements
for the Degree of

Master of Science

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Abstract

Developing the Creative Groundwork for Building Insight-Provoking Tools

The field of Marketing Research strives to reach its potential as a provider of insights related to consumer attitudes and behaviors. Departments have been renamed and hopes have been raised, but little change in process or deliverables is apparent. As a Marketing Research professional, I see that, generally, members of my profession demonstrate a keen lack of skill definition and training around practices that lead to insight. My Master's Project lays the groundwork for me to become a change leader as a catalyst for insight skill-building in my field. The project includes the product definition, a competitive assessment, a product plan and a publishing plan.

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Janese Evans

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Date

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Section One: Background of the Project

For twenty years Marketing Research has been working toward recasting itself to provide consumer insights. Books have been written, departments have been renamed and hopes have been raised. However, as a marketing research practitioner for the past 30 years, I see little change in actual behavior or success in delivering the insights promised. It is time for a change.

As an industry, we marketing researchers continue chasing the elusive consumer insight. It has multiple definitions, a great degree of ambiguity, a sense of risk taking, the need to pull together seemingly unconnected ideas and find their fit, and the result needs to be novel and have a useful application. It is apparent that marketing research professionals could benefit from the perspective of those who study creativity.

Meanwhile, there has been substantial thinking and research among creativity professionals on the philosophy of insight, definition of insight, the perspective required to achieve insight and the components of insight (Fortini-Campbell, 1992; Sternberg, 2006, 2003; Vitale, 2006; Walinga, 2010). Working toward the Masters in Creativity and Change Leadership has put me in a position to leverage my marketing research history with my academic and practitioner background in creativity. With this combination, I believe I can help my field of tradition achieve its promise of consumer insight. My long term goal is to be a catalyst for insight skill-building in my field.

The purpose of my Master's Project is to develop the plan for series of tools and ideas to help marketing research professionals build the skills and habits that lead to insight. A part of my long term plan is to develop and produce a workbook of tools and techniques to build insight skills. My Masters Project will lay the groundwork for that

workbook. Included in this the project is a description of key habits and practices related to insight, an exploration and analysis summarizing the competitive products (the extent to which they exist and their relative strengths and appeal), the defining of key components for the workbook and the development of a publishing plan highlighting the essential steps likely required to bring the workbook to fruition (See Appendix A for Concept Paper document overviewing initial plan for project).

Rationale for Selection

My company, Strategic Toolbox, is focused on the development and use of a mix of tools to support organizations in their strategic marketing decision-making. I tend to think in tools and their potential for making the complex and difficult more approachable. Part of my thinking has always included the development and publishing of the tools that I've used and adapted for a wider audience. The Master's Project offers the opportunity to develop and build the bridge from the mere idea of tools to a physical plan to make them come to life.

I plan to lay the groundwork for building insight-provoking tools by creating a product process for developing a workbook, including product definition, competitive assessment, product plan and publishing plan. The creation of the product process for a workbook is a challenging aspect for me. For most of my career I have developed tools and worksheets to guide the thinking of client teams. This product process is my first endeavor to product-ize my thinking. It is my first time to apply traditional market assessment and planning tools to create a process for formalizing my own work to prepare it for an audience beyond my current client base.

In my work and volunteerism I utilize my unique combination of marketing research, strategy and creativity skill in individual, customized interactions. It has long been a dream of mine to bring greater creativity to the marketing research industry. This Master's Project is my first step in making my dream a reality.

Section Two: Pertinent Literature

Walinga's (2010) articulation of insight has prompted much of my insight-related thinking. She suggests a conceptual model for unlocking insight to find those "aha" moments that happen with a sudden shift in thinking. According to Walinga, the potential for greatest insight comes, not at the solution stage in problem solving, but in the problem definition stage of the creative problem solving process. This link to problem finding requires a focus on the knowledge, rather than assumptions. Most thinkers begin with a solution that is largely based in doing things with the same basic approach as past experience, but faster or with more force. Eventually this hits an impasse. In contrast, an insightful solution is sustainable. Based on Walinga's research review, certain approaches facilitate the finding of insight. These include:

- **A dual focus in problem definition.** Focusing on perceived threat diverts people from goal achievement; however, focusing only on the goal (when a barrier exists) is unproductive. If a barrier is seen as a threat, the tendency is to try to overcome it. It is more useful to use the barrier by acknowledging it as part of the problem definition.

- **Constraint relaxation.** Generally an impasse can be broken if the constraints are lessened. These are more easily identified when the assumptions are separated from the knowledge. Hence the conscious separating of our knowledge from our assumptions is a skill to be developed.

- **Cognitive readiness.** The solver needs to be ready to see the solution. Walinga notes, "How many others alongside Newton had also witnessed an apple fall from

a tree?" If we are not looking in the right direction it does not matter how clever we are, we will not see what we need to see.

- **Failure.** Facing failure can make a problem owner more open to alternatives and insight.

Csikszentmihalyi (1997) reports that insight is one of the five key steps traditionally identified in creative problem solving. However, he suggests that, in real life, there may be several insights interspersed with periods of incubation, evaluation and elaboration (p.80). Thus there is heightened importance on cognitive readiness for recognizing the "Aha" or "Eureka" moments.

Sternberg (1999) suggests that insight has three components: *selective encoding*, which involves distinguishing relevant from irrelevant information; *selective combination*, which involves combining bits of relevant information in novel ways; and *selective comparison*, which involves relating new information to old information in novel ways. These are conscious and deliberate skills that can be honed.

Dietrich and Kanso (2010) have investigated brain activity to better understand what really happens during moments of insight. They find that, similar to creativity, neuroimaging shows that insight is a whole brain activity. Creativity and insight have overlapping properties, but are not wholly duplicative.

John Maynard Keynes (2008) is credited with saying, "The difficulty lies, not in the new ideas, but in escaping from the old ones." This seems aligned with the definition of creativity from Ackoff & Vergara (1988) who suggested that creativity is the ability to modify self-imposed constraints. To what extent is insight dependent on getting out of our own way? Marketing researchers need to challenge themselves to leverage the

content but to find greater insight by leaving behind traditional thinking regarding its application.

Scientists in Australia have been testing a way to stimulate creative thinking through light electrical current to the left side of the brain (Chi & Snyder, 2010). The idea is that the current would interrupt the dominance of the anterior temporal lobes, thus inhibiting recent memory on the left side of the brain and allowing the right side of the brain to play a larger role in creative problem solving. The research suggests that there may be a way to temporarily let our cognitive style be less influenced by the past and more open to possibilities. Their theory was that holding on to past experience may be blocking innovation and insight.   Clearly more research needs to be done. But the concept is intriguing. A greater awareness of individual and corporate assumptions will likely make insight-finding activity more fruitful, even without electrical manipulation.

Additional Selected Resources

Three types of resources that have been useful in grounding my thinking and guiding my exploration:

1. Writings from the marketing research perspective regarding the need for insight and how the application of insight principles could shape the field. These resources are included so that I continually work to understand the thinking of my target audience.

2. Scholarly research and discussion related to the components of insight. These are included to ensure that my tools and techniques are well-grounded and based on the thinking of those keenly focused on the topic.

3. Guides related to process development and facilitation to assist me in formalizing my
   thinking related to tools and a workbook.

Chrysikou, E. (2006). When shoes become hammers: Goal-derived categorization
   training enhances problem-solving performance. *Journal of Experimental
   Psychology: Learning, Memory, and Cognition, 32*(4), 935-942.

Csikszentmihalyi, M. (1997). *Creativity. Flow and the psychology of discovery and
   invention.* New York, NY: Harper Perennial.

Csikszentmihalyi, M. (1997). *Finding flow. The psychology of engagement with
   everyday life.* New York, NY: Basic Books.

Fortini-Campbell, L. (1992). *Hitting the sweet spot: How consumer insights can inspire
   better marketing and advertising*. Chicago, IL: The Copy Workshop.

Kershaw, T. & Ohlsson, S. (2004). Multiple causes of difficulty in insight: The case of
   the nine-dot problem. *Journal of Experimental Psychology: Learning, Memory,
   and Cognition*, *10*(1), 3-13.

Omerod, T. & Lancaster, U., (2002). Dynamics and constraints in insight problem
   solving. *Journal of Experimental Psychology: Learning, Memory, and Cognition,
   28*(4), 791-799.

Parnes, S. (2004). *Visionizing: Innovating your opportunities* (2nd ed.). Buffalo, NY:
   Creative Education Foundation.

Sanger, J. (1994). Seven types of creativity: Looking for insights in data analysis. *British Educational Research Journal, 20*(2), 175-185.

Schieffer, R. (2005). *Unlocking the mind of the market. Ten key customer insights.* Mason, OH: South-Western.

Schooler, J., Ohlsson, S., & Brooks, K. (1993). Thoughts beyond words: When language overshadows insight. *Journal of Experimental Psychology: General*, *122*(2), 166-183.

Sloane, P. (2010). *How to be a brilliant thinker. Exercise your mind and find creative solutions.* Philadelphia, PA: Kogan Page Limited.

Vitale, D. (2006). *Consumer insights 2.0: how smart companies apply customer knowledge to the bottom line*. Ithica, NY: Paramount Marketing Publishing, Inc.

Walinga, J. (2010). From wall to windows: Using barriers as pathways to insightful solutions. *Journal of Creative Behavior, 44*(3), 143-167.

Zaltman, G. (2003). *How customers think: Essential insights into the mind of the market.* Boston, MA: Harvard Business School Publishing.

Applying the Theory

In searching for additional novel and useful ideas to guide marketing researchers as they develop their insight skills, I will supplement published literature with non-marketing fields which utilize significant insight. Part of the skill of insight is in considering multiple points of data and sources of seemingly unrelated data to provide a new look. In the interest in applying that skill to this process, I will be interviewing

people from a mix of fields who utilize similar skills for perspective on how they have been trained to consider multiple points of view and data.

Individual interviews will are planned with a police officer, a triage nurse, a social worker, an elementary principle, a data miner, an intellectual property attorney and an investigative reporter. While this likely seems a disconnected assortment of professional fields, each balances multiple perspectives and pieces of information to get to a better understanding of a situation. All make judgments as to the objectives, the obstacles, the relevant data and the irrelevant. I expect each will have a process for sorting and sifting through the multitude of pieces of information to find the bigger, more meaningful understanding.

I hope to use the collective learning to identify alternative exercises, tools, habits and practices for use with marketing research professionals to help them hone their insight-finding skills.

Section Three: Process Plan

My Master's Project is a product process which includes these key elements: product definition, competitive assessment, product plan and publishing plan. Each element, with its goals and outcomes, is described below.

Product Definition

The goal is to have strong understanding of insight-finding so that potential tools could be developed to practice those skills. This requires substantial grounding in the current thinking on the components of insight.

I intend to read and summarize relevant sources referenced in the Walinga (2010) article so that I have not only her synthesis of the learning, but the understanding of individual sources, as well. Specifically, I am interested in a deeper understanding of her sources related to these insight-finding practices:

- Including both goal and barrier in the problem definition.

- Relaxing constraints.

- Being cognitively ready.

- Facing failure.

These represent conscious and deliberate skills that can be honed for insight skill development. A first step in my process will be to gain a better understanding of the thinking behind why these components make a difference. This will enable the development of a better and more credible product.

With the literature for context, the individual interviews in high-insight professions will be conducted. The combination of scholarly thinking and practical

application will form the basis for building insight-provoking tools for marketing research professionals.

Competitive Assessment

The goal of the competitive assessment is to understand what other workbooks, tools and insight-development resources exist that could reasonably be seen as competition for the proposed tools. This is essential so that the eventual product has a distinct point of difference, new perspective and value in the marketplace. The learning from the competitive assessment will help me clarify and define the what, how and for whom that will be needed to position my tools for successful implementation and market introduction.

Product Plan

The goal of the product plan is to define the key components of the product. While it is described as a set of tools, questions remain as to the specifics of its creation. Is it a deck of cards, an iPhone app, a book or something else? How might it be presented for greatest clarity and ease of use? How might it be presented for greatest credibility among the marketing research audience? Just how many tools are included? With a clear understanding of the product definition and competitive offerings, the product plan is a roadmap for how the tools can be best brought to fruition. As this plan is created it will be offered for review to three to five marketing research professional for feedback on the content and proposed presentation.

Publishing Plan

The goal of the publishing plan is to create a strategy for getting the product produced. Absent this plan and its implementation, the tools will not reach the marketing research community and never be used. The publishing plan includes researching alternative resources for bringing the tools to market and choosing the best route for the product and audience.

Project Timeline

- Week of January 30: Submit Concept Paper for approval. Review the Walinga article and its references for my deeper dive into the academic groundwork on insight process. Gather key articles/sources for my deeper literature review.

- Week of February 6: Rework Concept Paper, as needed. Tackle the reading

- Week of February 13: Submit final Concept Paper. Complete the reading and summarize relevant elements for their application to my project. (20 hours)

- Week of February 20: Define key components of the workbook based on literature search and begin competitive product search.

- Week of February 27: Complete competitive product search and review. Map reverse-positioning of competitive products to identify white space/points of difference that might enhance market-ability and content for my workbook. Bounce strategy and thinking with Tom Andahl, my sounding board partner.

- Week of March 6: Write a product plan. Create draft/outline of two or three potential tools. Go to Cancun and Chichen Itza and process from a beach perspective.

- Week of March 13: Review key elements with 3-5 marketing research professionals in my network for feedback and refinement.

- Week of March 20: Research publication strategies. Write initial publication approach for sounding board partner review. Also, approach Mary Kay Culpepper (cohort member, retired journalist, and great thinker) for initial publishing guidance.

- Week of March 27: Reflect, plan, refine and synthesize. Begin drafting project paper. Redraft based on anticipated inspiration and/or anxiety.

- Week of April 2: Finish up draft of project paper. Incorporate comments from sounding board partner. Deliver to Sue K-M for review.

- Week of April 9: Work on project presentation.

- Week of April 16: Attend CREA in Italy. Incorporate final comments and submit.

- Week of April 23: Finalize presentation.

Section Four: Outcomes

This project was designed to include four strategic planning elements: the product definition, competitive analysis, product plan and a publishing plan for creating a workbook of tools to aid marketing research professionals in developing their insight-related skills. While not originally in my plan, it has become evident that a definition of "insight" clarified the scope of the project. Defining insight became a valuable element of the final project.

Defining Insight

On a smaller scale than the challenge Mel Rhodes faced in 1961 in trying to identify a common definition of "creativity," it is apparent that there is no commonly accepted definition of "insight." As an alternative to the generic definitions presented online and in dictionaries, and the circular references of my thesaurus, I turned for definition to those for whom the workbook is intended: an audience of marketing and marketing research professionals. In a quick survey of 20 of my peers in leadership positions I asked for words and phrases that define "insight." While, not surprisingly, there was no single, universal response, a word cloud (courtesy of www.tagcrowd.com) highlights several common themes among my informal cohort of industry professionals.

Figure 1. Marketing Research Leadership Key Words Defining Insight

Thus, my working definition of "insight" formulated became: *a deeper understanding or new perspective that is relevant for decision-making*. I've never created a working definition before. Let me review my logic. As written, it seems appropriately vague, which is well-suited to the mystery of insight, as well as a variety of marketing situations. Yet, it is purposeful, in that it is tied to relevance in decisions. It implies a clarity and actionability coming out of the fog of combining disparate data. And, it avoids the cliché, luck-based element of the aha moment. Whether it has come to me by insight or more the traditional problem solving route of continuous and incremental process, I'm keeping it.

Product Definition

Implications from Literature

As I work to assemble and build tools and ideas to help marketing research professionals build the skills and habits that lead to insight, I wanted to be confident that I understood the relevant thinking. Much of my inspiration for this project stems from the Walinga's (2010) articulation of her recommended path to being more insightful. To better understand Walinga's path, I've read the research articles she references in particular areas. Of specific interest were the details behind her assertion that these four elements are essential components of getting to insight:

- Including both goal and barrier in the problem definition.

- Relaxing constraints.

- Being cognitively ready.

- Facing failure.

The following reviews key learning in each of these areas and their implications for defining my product.

Including both goal and barrier in the problem definition. Walinga stresses that most insight comes as a result of how the problem is defined. The impact on this product is the importance of understanding the issues. I find substantial linkages between the need for clarity in goal-related problem definition and The Thinking Skills Model (Puccio, Mance & Murdock, 2011) which includes clarification as a key component. Several of the affective skills that support Creative Problem Solving (CPS) and indicate readiness to engage—curiosity, dreaming, seeing gaps, playfulness, and others--will be useful skills in being insight-ready.

While I am certified in the Synectics Model for creative problem solving, its components are less well-suited for application here. Synectics is less focused on a detailed examination and exploration of the challenge; rather it states the issue and moves quickly to ideation and metaphor. These are expected to be less useful here, so, although I considered its potential application, I have decided against it as a reference for this endeavor.

DeBono (2005) asserts that the majority of mistakes in ordinary thinking are mistakes in perception. The application here is to practice clearly understanding assumptions, so as to be able to separate the assumptions from knowledge.

Relaxing constraints. Ormerod, MacGregor, and Chronicle (2002) experimented with a variety of strategic prompts to see their impact in overcoming assumptions. Their series of hints proved ineffective in increasing the frequency with which their 8-coin problem was solved. Their work built on the more traditional 9-dot experiments of

Kershaw & Ohlsson (2004). The authors argue that success requires additional focus on the perceived constraints. For marketing research professionals, insight-readiness practice should likely include a detailed understanding and examination of the constraints—external and self-imposed—rather than solely focusing on the goal.

The benefit of relaxing constraints was examined by Chrysikou's (2006) experiments in training subjects to explore different used for common objects. Participants grouped and regrouped objects by similarities, potential uses, and appropriateness for different goals. The practice of seeing common objects in non-traditional taxonomic categories aided participants in solving insight problems later. Categorization, more that embedded figures or word association, expanded the problem-solving capabilities. To me, this indicates that marketing insight-finding may also be enhanced by the practice of finding uncommon connections; this type of practice may make practitioners more familiar with and more readily able to combine data in new ways to aid decision-making.

The impact of jointly explaining and solving insight problems was explored by Schooler, Ohlsson and Brooks (1993). They found that verbalizing the problem-solving process can interfere with success on insight problems. They suspect that verbalizing interrupts the non-reportable process of problem solving. This suggests to me that a workbook on skills may be more beneficial than group activities as it would allow the individual to practice specific skills to enhance personal techniques and thinking skills. Insight skill development may be a private activity rather than a shared practice.

Being cognitively ready. To be insight-ready requires a certain cognitive-readiness. Ormerod, MacGregor, and Chronicle (2002) noted that problem solvers must be ready to give up their pre-insight constraints. Their work showed that some subjects

were likely to return to their original constrained thinking, rather than embrace the insight. I anticipate that acknowledging and practicing the affective skills which support readiness (Puccio, Mance & Murdock, 2011) —openness to novelty, tolerance for ambiguity and tolerance for complexity--will be important in helping marketing researchers be cognitively ready for insight.

   Facing failure. Approaching failure tends to make people more open to considering alternatives. And, understanding the reasons for failure can help generate new ways to define the problem. CPS tools that promote divergence will likely be very helpful on this component. Additionally, practicing components of an insight problem, before approaching more complex problems, aids in insight problem-solving success (MacGregor, Ormerod, & Chronicle, 2001). For me, this reinforced the value of the overall idea of presenting marketing researchers with tools and practice to improve their insight-readiness skills.

Implications from Practitioners

   To supplement the academic research on insight, I talked with people in a mix of professions regarding how they approach activities that require insight and how they developed the insight skills they utilize. I've had similar discussions with people in brand management, strategic planning, religion, law enforcement, medicine, law, and educational administration. While not intended as an exhaustive list of professions, it was sufficiently varied, to provide an interesting array of practices; some were more relevant than others. The professions included law enforcement representatives working in high risk areas of a major metropolitan area, medical professionals (a trauma specialist at an inner city safety net hospital and a pediatric specialist at a world-renowned clinic),

brand managers and strategic planners from international packaged goods companies, an intellectual property attorney protecting ideas internationally, a Roman Catholic priest focused on building community, and an elementary principal guiding the education of more than 600 students daily. The following summarizes my key learning in each of these areas and their implications for defining my product.

Police Officer. The job involves taking in multiple perspectives, making judgments on the veracity of the claims based on the details provided and credibility of the witness, and relying on a partner's experience to supplement his own knowledge. The outputs of these components are the data used in discerning what really happened. All actions are made with a clear goal in mind: "make all decisions so that I can go home safely at the end of the shift." Training to prepare for insight and discernment was largely based on case study practice at the Police Academy. For my project, the learning from law enforcement is about clarity of the goal, looking at a situation from multiple perspectives, separating the relevant from irrelevant, and the importance of practice.

Priest. The priest was encouraging people to look at issues in a bigger context, challenging their own assumptions, reframing thinking, keeping focus on what really matters and being comfortable with ambiguity. The discussion made me think that this was my weakest area. When applying his process for helping people be more insightful, I am focusing on the importance of the affective skills identified in the Thinking Skills Model and the importance of their role in insight.

Intellectual Property Attorney. My interview with the attorney was fascinating for me. Even though the discussion was about insight, the tools and problem solving process seemed more reflective of traditional problem solving with a continuous,

incremental process. What was reinforced for me, is that not all problems require insight; some are more distinctly process based in the resolution they require. Additionally, the idea of insight holds some elusive, aspirational appeal. Maybe there are nuggets of insight in all of us. Are we all insightful, just as we all have creativity? Like some of my marketing research projects, this interview generated more questions for me than it answered. While out of scope for this project, it has some intriguing applications for other work, potentially including problem solving style and perceptions on the use of insight. Clearly there are deeper understandings of insight that could be explored.

Elementary Principal. While this is a multi-faceted job, our discussion followed some playground dispute resolution. In this aspect, the job was similar to the law enforcement perspective, although the process and consequences were distinctly different. She was mapping what happened in a way that had all parties contributing and aligning on the facts. In her process it became clear as to where there was agreement and where the facts of the incident were contradictory; the aha moments of clarity in the problem solving were readily apparent on the faces of the children involved. The application for marketing research insight-readiness is in looking for themes and consistency, as well as distinct difference, from disparate data sources. It is the combining of the mixed data that leads to a more complete understanding of the situation, and hence, to insight.

Medical Doctor. The work appears to be a mix of applying scientific process and a more qualitative approach of looking for themes and anomalies. It is that combination which creates a circuitous path of eliminating and connecting, enlightening and confounding in the art of diagnosis. Similar to the presence of a clarifying goal seen with

other professions, here the oath is to do no harm. Much of the training was done by studying the process of others, whether by academic case work or mentoring. Beyond the rigor of medical training, the doctor from the safety net hospital employed what he considered a combination of common sense and insight. While a gunshot victim may have a superficial wound, the decision for hospital admittance may be impacted by more than the immediate physical/medical needs. It may be that the patient's overall sense of security would be enhanced by an overnight stay if the shooter is still at large and going home is perceived as unsafe. The application for my project is the benefit of practice and contextual consideration. Insight-readiness is likely a life skill, not merely a professional skill.

Brand Manager. In brand management, the goal is to have consumer insight. This is less about the "what" and "how" of the target audience's decision-making and more about the "why". He considered an insight to be an understanding about motivation that was enduring and true for the audience. A true insight, from his point of view, could be utilized by any brand. The job of the brand manager was to connect that truth to the brand in a meaningful and ownable way. They use research to explore an emotional connection that is relevant for the audience and try to make linkages between that emotion and the strengths of the brand. The application I see for my project is the importance of getting past the traditional tools of marketing research, and exploring metaphors, associations, and expected connections. Some of the divergent and convergent thinking tools will be beneficial here to promote the skills of thinking more broadly and experimenting with how seemingly unrelated elements might be connected. Interestingly, while this is likely the closest field to marketing research of those I explored, there was no real training related to insight-readiness skills. And, although

there was a division-wide verbal commitment to being insight-driven, it was not included as an element in any performance review. My workbook may have a broader application, beyond marketing research, to brand management and general marketing.

Strategic Planner. For this interviewee, creating a strategic plan involved having a distinct process. It was her comfort of knowing the depth of data and consideration, the examination of alternatives, and understanding the context for the decision that gave her insightful plans credibility. Her process included a thorough understanding of barriers and failure, as well as opportunity. Consistent with Walinga's theory, it was this planners commitment to including barriers and potential failure that prompted her to be more thoroughly be ready for insight.

Product Definition Summary

The goal of my product definition work was to have strong understanding of insight-finding so that potential tools could be developed to practice those skills. On the basis of my literature and practitioner investigation, the product needs to include tools to support the following:

- Clarifying the goal.

- Having a process and path.

- Separating knowledge from assumptions.

- Challenging assumptions.

- Approaching an issue from multiple points of view.

- Looking for similarities and themes in data.

- Looking for the odd bit. Not only similarities but differences.

- Finding things that are intriguing and news.

- Distinguishing relevant from irrelevant information.

- Combining bits of relevant information in novel ways.

- Relating new information to old information in novel ways.

- Considering the potential for failure, and alternative approaches for success.

- Building agreement and consensus.

- Evaluating insights for actionability and relevance.

- Managing risk.

Overall, a version or adaptation of CPS tools seems well-suited to support marketing and marketing research professionals in becoming more insight-ready.

The approach I use with clients as they define their products and services includes a positioning statement. The statement is for internal use; it defines the audience, competitive set, audience benefit and reasons it would be believed. The format is: For (*target audience*) this is the (*competitive set*) that (*benefit*) because (*reasons to believe*). Applying this to my idea, my position statement is:

"For *marketing and marketing research professionals* this is the *professional development resource* that *helps you be more successful in fulfilling the promise of providing insights* because it:

- *Focuses on skills that can be practiced and honed*

- *Is written specifically for marketing decision-making*

- *Leverages my 30 years of experience in marketing research*

- *Is grounded in the latest academic thinking on creativity and insight"*

Competitive Assessment

The goal of the competitive assessment was to understand what other workbooks, tools and insight-development resources exist that could reasonably be seen as competition for the proposed tools. Information came from several sources including: peers, Google-based searches on a myriad of terms (insight, insight training, consumer insight, finding insight, and innovation training), inquiries with the editor of *Quirks* (a marketing research magazine), the American Marketing Association and the Marketing Research Association, as well as exploring titles available on Amazon.com.

I was looking for general training, tips and tools related to being insightful, and specific resources for marketing researchers related to consumer insight. I found little for direct comparison and ready application.

What I found is a myriad of books using "insight" in the title. However these are generally conveying the author's knowledge on a specific topic, rather than coaching on insight as the topic itself. Overall, "insight" seems to be a buzz word that attracts attention. Google offered 308,000,000 results for a search on "insight" (in .2 seconds). "Insight training" yielded 81,500,000 results, including rifle-siting courses and software seminars. "Consumer insight training" generated 8,500,000 hits.

After sorting and sifting, the closest competitive resources I've found are these:

- Fortini-Campbell (1992) wrote *Hitting the sweet spot: How consumer insights can inspire better marketing and advertising*. This is the book that started all the consumer insights talk in the advertising agency and marketing research communities. It has theory and justification for moving to a more insight-based focus in marketing. The book includes some practices that are intended to yield insight. There are no tools for building personal insight-ready skills. However, in talking

with her publisher, he described the 20 year old book as "long in the tooth" with
diminished sales.

- Durgee (2005) offers a book called *Creative insights: The researcher's art. Finding hidden needs for new products and new brand positionings.* This is a wonderful presentation of qualitative techniques that elicit consumer feedback that might lead to an insight. The book is consumer-research focused on qualitative techniques for eliciting insight, rather than researcher-readiness focused.

- Brand Steward Insights is a consultancy of former Diageo brand builders who offer one and two day sessions to marketing teams on defining and finding consumer insights. Workshops are currently for in-house teams of up to 15. Open attendance workshops are being discussed for individuals, but are not regularly available. This appears to be based as part of a larger consulting experience. No reference materials are available for sale on the website.

- Consumer Insight Solutions offers a member-only site. They sell team-based courses in practical insight skills and coaching for insight as part of a broader consultancy offering. Their Take a New Look at Insight offers quick bites of information on what could be learned from a different profession.

In short, I think I'm on to something. There is no published resource related to insight-readiness that is targeted at the marketing research community.

Product Plan

The goal of the product plan is to define the key components of the product. My product is as a set of tools. While I believe it has some inherent marketing elasticity for other formats, based on the way it is intended to be used, I see its initial incarnation as a printed workbook. Physically, the book has a spiral binding that allows it to open and

remain flat while the tools are practiced and the user works through the pages. Ideally, I'd like a paper binding over the spiral so that when placed on a bookshelf, the title is visible. I also see this as slightly smaller than 8.5 by 11, to aid its portability and reinforce its uniqueness.

Content-wise, I envision the book starting with a welcome and some basics on insight to provide some definitions, context and credibility. The next sections will be organized according to the process, with general practice for fluency followed by marketing research-specific examples. The overall flow is expected to be as follows:

1. Getting ready. This section focuses on the affective skills. I'm not sure how, yet. I have more development to be done here.

2. Clarifying the goal. This section potentially includes challenge clarification tools from the CPS process, as well as questions and prompts to refine the goal.

3. Challenging the data. Potential tools include utilizing multiple perspectives, reviewing historical data, convergence techniques for combining and recombining data in new ways. The focus here is in separating knowledge from assumptions, looking for similarities and themes in data, looking for anomalies.

4. Recognizing an insight. Is it really an insight or just an interesting piece of data? This section includes an acid test for insight by identifying and exploring its implications and enduring nature.

5. Building agreement. In insight problem solving, the potential for failure prompts consideration of different approaches. Some of the challenge for marketing researchers is in finding an audience for their ideas. This section offers alternative approaches for selling the ideas and generating consensus.

I've discussed the content and the product with several in peers involved in marketing research and strategic planning. Overall, I've had a very favorable response. As an issue, insight-finding gets great lip service and little concrete support. Few have a process for insight-finding; most focus on the results of research and then look back to glean what insights are to be uncovered, rather than spending more time on the way the goal is defined. As a result of my product review, I've had offers to present and practice the tools with teams at a national marketing research, a large privately held food company, and educational institution marketing team and an advertising agency. I've realized that, while the workbook is intended to stand alone, its marketing and use may be enhanced by a workshop setting. I'll need to explore the workshop delivery component.

Publishing Plan

The goal of the publishing plan is to create a strategy for getting the product produced. According to Bowker LLC's industry stats (www.bowkerinfo.com) nearly 250,000 books were published in 2009, and almost 9,000 of them were business books. The competition on topic may be minimal, but the competition related to clutter and shelf space is tremendous. Thus, the consideration of publishing and the delivery system is critical to the economic success of this endeavor.

The relative merits of several alternatives have been considered. In this process I've discussed publishing with a recently retired editor of a national magazine, several who have self-published, artists and creative directors who have supported self-publishers and two regional specialty publishers. As a result of their feedback, I have assessed my publishing opportunities.

While major publishing houses may have name cache, they are better suited to books with widespread appeal. This workbook is very specific in its target audience. The most recent U.S. Census reporting of the North American Industry Classification System codes 541910 and 541613 respectively shows just over 122,000 are employed nationwide as marketing research professionals and another 95,000 marketing consultants (www.census.gov/econ/industry/current.htm). At these numbers, the book could likely be a financial success with a minimal acceptance rate. However, it will never have "best seller" volume potential.

It is my understanding that major publishing houses look more favorably on the series, rather than single volume books. Publishers and publishing insiders with whom I spoke reported that the real money for major publishers is rarely on the first title, but more commonly on the subsequent following of an initial marketing success. At present, the workbook is conceived as a single volume, rather than a series. As such, the likelihood of consideration by a major publisher is expected to be nearly nil.

The next consideration was to look at a smaller, specialized publisher, potentially a regional provider. In hopes of making a linkage, I looked at the publisher of the two books I considered in the competitive set. They were both published through The Copy Workshop. While initially that felt promising, the contact information for The Copy Workshop is only an email through aol.com. In talking to Bruce Bendinger, the primary contact, I find that his organization may be a little bigger than anticipated by the generic email. However the focus is in college texts and his marketing support is minimal. He tempered my sense of market potential when he explained that the two insight-focused

books he's published sell a couple hundred copies a year. While I've explored a few other regional publishers, the story of focus and support remains the same.

The most practical route, with the greatest control, seems to be to self-publish and pursue a print on demand strategy. As I refine the actual product I will use my network of independents to find a suitable illustrator and editor. With a print on demand strategy I will be able to create preview copies for use with the testing groups I've been offered.

Pending results with some test audiences, the workbook would be finalized. At that point a variety of approaches to speaking and workshops would be developed. First audiences to be approached would be the local chapters of the American Marketing Association and Marketing Research Associations, with an eye toward joint presentations at related marketing and research conferences.

Section Five: Key Learnings

Introduction

My primary learning during this Master's Project is that what has long felt like two divergent sides of my professional life—marketing research and creativity--can be reasonably connected through the concept of insight. By examining my process through the lens of Walinga's steps that have so intrigued me, I am now better able to recognize my own potential contribution to my professional fields.

Including Both Goal and Barrier in the Problem Definition

As an industry, Marketing Research's desire to be insightful, and recognized as insightful, has long been present. However the barriers to achieving that insight have been in not adequately understanding and accepting a definition of insight, changing the practice of just reporting what happened rather than looking deeper for the why, and accepting the risk of taking a position rather than merely handing conclusions to the general marketers. Based on my reading and discovery, I have a better sense of the opportunity and the barriers to success.

Relaxing Constraints

Most of the constraints I see among the audience of marketing researchers seem self-imposed or historically accepted. I too, have been wrestling with the self-imposed constraints of how my professional life is defined. The other night at dinner, I was explaining this project to friends and said, "I really know how to do this!" The response I got was, "I don't know why you seem surprised." And, with that realization, a self-imposed constraint of how I view my skills was relaxed, if not eliminated.

Being Cognitively Ready

As I look back, I have been preparing to find a synergism between creativity and research for more than 20 years. My avocation has been creativity work, my vocation focused on marketing research. Others may have seen this link in me before, but not me. So it is my current state of cognitive readiness that makes this workbook undertaking possible. Hopefully, now that my readiness light has gone on, I'll be better able to ignite the readiness of others toward the cognitive and affective skills related to insight.

Facing Failure

So what's the worst that could happen? I'm thinking it is that people say, "No, thanks." All signs, however, are in the opposite direction. I find people ready to encourage, test, explore and examine. If the marketing research professionals in my peer group are willing to play with these ideas and my approach, and if I listen to their feedback, there is only opportunity: both for me and for enhancing my profession.

Overall, in the process, I've learned the my idea has merit, that specific competition is minimal, and that by looking at insight as a thinking skill, rather than in industry-specific skill, some version of what I'm planning may be applicable to other industries, as well.

Secondary Learning

My secondary learning goals were more related to how I work and with whom. During this process I'd had the opportunity to leverage the unique talents within our cohort and within my peer group. The openness and ready access people have given to me is gratifying. I find people gracious in sharing their knowledge and flattered to be

asked their opinions. As one who generally works on her own and studies alone, there have been wonderful reminders about the value of collaboration and sharing. And, I am grateful.

Summary

What was begun as a project has become a life lesson, as well. In reflecting, it seems that the steps taken to increase a person's insight-readiness may well be good advice in the pursuit of any new endeavor: be clear and realistic on the goal, be open to newness and consider the options from different perspectives. I may have just spent the past two years in graduate school gaining a clearer understanding of what my parents tried to teach me in my youth; what they might have called common sense. And, while much of the essence of these ideas may seem like common sense, their application is not widespread. That is the heart of the issue. The overall approachability and understanding of insight principles and finding a way to spread the learning through the marketing research community is what this project has at its core.

In this Master's Project I've gained a clearer understanding of the components of both insight-readiness and workbook development. It has given me a focused definition of my goal, a process to ensure its fulfillment, and the confidence to move forward.

Section Six: Conclusion

My goal was to link my work in creativity in such a way so as to create a product that benefits my work in marketing research. To do this, I focused on reviewing the current thinking so as to define my product appropriately, understanding the challenges of bring that product to market, as well as planning and scoping the product and its production.

Throughout this process, as expected, some things changed and others remained the same. The clear constant was my desire to link the two aspects of my professional pursuits more fully: identifying the bridge between creativity and marketing research. In my searching, discussions and discernment, I feel confident that there is a clear link between the two, and it is surrounding insight-finding. At present, marketing research claims the promise of consumer insights, but has not identified a way to produce or recognize insights with any regularity. I am convinced that the linkage between promise and performance can be solidified by adapting creativity tools for marketing research purposes.

My thinking on how to create the product has shifted. Originally, I anticipated a much greater need for the creation of new tools that leverage what I've learned throughout this program. However, in examining the needs, I think that it is the adaptation of current creativity tools for insight- and marketing-specific use that is more appropriate. I fully expect that some of my worksheets and ideas will utilize some new tools. But this process has also prompted me to consider taking current, well-tested tools and fitting their essence to a new purpose and audience.

I had big dreams for impacting the marketing research industry. While I still intend to have a substantial impact, the scope and speed of anticipated change is somewhat mitigated. I intend to step back; to test and retest.

During the timeline of this project, I had the opportunity to attend the CREA Conference in Sestri Levante, Italy. While there, I participated in the program related to coaching. In those few days, it became clear to me that the workbook--especially in its testing/refinement phase--will likely require a workshop format to coach potential users in its adoption and application. The workshop would also serve as a vehicle for feedback. It may be that, initially, a workshop will support the adoption of the workbook; eventually, I expect the workbook could be support for a series of workshops. This extends my initial thinking into an exciting, integrated marketing plan.

I have an enthusiasm for the project that I didn't expect and a renewed confidence that I can make it happen. At the same time, I have a new respect for authors and trainers, and all the behind the scenes work required to bring this type of project to fruition. As I review my process and outcomes, I hear the basic clarifying question repeating in my mind: "What's stopping you?" I am delighted to reply, "Nothing! I have my direction; I'm running forward."

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APPENDIX A

Concept Paper

RUNNING HEAD: Creative Groundwork For Building Insight Provoking Tools

Master's Project Concept Paper

CRS 690

Janese Evans

The International Center for Studies in Creativity

Buffalo State College

January 29, 2012

Project: Operationalizing Insight

Name: Janese Evans   **Date Submitted: January 29, 2012**

Project Type: Identify and produce the creative groundwork needed to build insight-provoking tools for marketing research professionals.

Section One: Background of the Project

Purpose and Description of Project:

For twenty years Marketing Research has been trying to recast itself as providing consumer insights. Books have been written, departments have been renamed and hopes have been raised. While traditionally it is a profession of discipline, we demonstrate a keen lack of skill definition and training around skill-building and practice that leads to insight. Uncharacteristically, marketing researchers are using hope as a strategy for success in delivering the insights their new moniker promises. It is time for a change.

My Big Question Paper for CRS 635 focused on moving Marketing Research professionals from hindsight to insight by applying the techniques and principles identified in creativity research. There has been substantial thinking and research among creativity professionals on the philosophy of insight, definition of insight, the perspective required to achieve insight and the components of insight. It is time to leverage my knowledge of the promise and potential of my marketing research history in combination with my academic and practitioner background in creativity. With this combination, I believe I can help my field of tradition achieve its promise of consumer insight.

My goal is to be a catalyst for insight skill-building in my field. A part of my long term plan is to develop and produce a workbook of tools and techniques to build insight skills. My Masters Project will lay the groundwork for that workbook. Included

in this is a greater depth of understanding of the habits and practices related to insight, an exploration of the competitive products (the extent to which they exist and their relative strengths and appeal), the outline and scoping of the workbook and the development of a publishing plan.

Rationale for Selection:

      My company, Strategic Toolbox, is focused on the development and use of a mix of tools to support organizations in their strategic marketing decision-making. I tend to think in tools and their potential for making the complex and difficult is more approachable. Part of my thinking has always included the development and publishing of the tools that I've used and adapted for a wider audience.   For several years I have been—much like the Marketing Research field—using hope as a strategy, rather than building an actual plan for moving from concept to reality. The Masters Project offers the opportunity to develop and build the bridge from the mere idea of tools to a physical plan to make them come to life.

      Truth be told, I would rather promise to create the full workbook during this project semester; I understand that is naïve. To keep this within scope of the semester, I plan to lay the groundwork for building insight-provoking tools.

      To have this project focused on applying creativity thinking to the marketing research industry, moves me forward—out of hoping and into reality--on my dream of utilizing my unique combination of marketing research, strategy and creativity skills.

Section Two: Pertinent Literature

Pertinent Literature:

It is Walinga's article (2010) in Journal of Creative Behavior (44,3) that has prompted much of my insight-related thinking. In exploring further, the following represent a starting point in my literature and competitive search for tools and techniques for developing capabilities related to insight.

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Section Three: Process Plan

Achieving Goals and Outcomes:

To be successful this semester will require an additional depth of research review. I intend to look at the Walinga (2010) article and sources for a greater understanding of the components of practicing insight and the supporting research. Beyond that, I will be applying some classic product development steps to my own thinking: understanding the competitive set, clarifying the needs of the target audience, and learning about the distribution channel (publishing). The combination of these is intended to clarify and define the what, how and for whom that will be needed to position my workbook for successful implementation and market introduction.

Project Timeline:

- Week of January 30: Submit Concept Paper for approval. Review the Walinga article and its references for my deeper dive into the academic groundwork on insight process. Gather key articles/sources for my deeper literature review.

- Week of February 6: Rework Concept Paper, as needed. Tackle the reading

- Week of February 13: Submit final Concept Paper. Complete the reading and summarize relevant elements for their application to my project. (20 hours)

- Week of February 20: Define key components of the workbook based on literature search and begin competitive product search.

- Week of February 27: Complete competitive product search and review. Map reverse-positioning of competitive products to identify white space/points of

difference that might enhance market-ability and content for my workbook. Bounce strategy and thinking with Tom Andahl, my sounding board partner.

- Week of March 6: Write a product plan. Create draft/outline of two or three potential tools. Go to Cancun and Chichen Itza and process from a beach perspective.

- Week of March 13: Review key elements with 3-5 marketing research professionals in my network for feedback and refinement.

- Week of March 20: Research publication strategies. Write initial publication approach for sounding board partner review. Also, approach Mary Kay Culpepper (cohort member, retired journalist, and great thinker) for initial publishing guidance.

- Week of March 27: Reflect, plan, refine and synthesize. Begin drafting project paper. Redraft based on anticipated inspiration and/or anxiety.

- Week of April 2: Finish up draft of project paper. Incorporate comments from sounding board partner. Deliver to Sue K-M for review.

- Week of April 9: Work on project presentation.

- Week of April 16: Attend CREA in Italy. Incorporate final comments and submit.

- Week of April 23: Finalize presentation.

Section Four: Outcomes

Tangible Products:

The tangible outcomes are a summary understanding of current creativity scholarly thinking regarding insight, a review of key steps in readiness for insight and insight formation, a product development and proposed marketing plan, and a strategy for approaching publications regarding an insight workbook. This is expected to include a draft of example of two or three tools for potential inclusion.

Section Five: Key Learnings

Personal Learning Goals:

Two primary goals are accomplished by the completion of this master's project:

- First is the examination of the intersection of my two seemingly distinctly different professional endeavors: marketing research and facilitating creativity. This topic is the thread that connects two distinct careers for me. Crafting the masters project in this way helps me realize a greater contribution that I can make to the marketing research industry.

- Second, is the planning for productizing my work. I have long thought that I was meant to create products for an audience bigger than my current client base. While this masters project is the development of a plan to bring this workbook to life, it likely serves as a roadmap to bring other products to fruition.

Other goals are distant seconds to the initial two. They include:

- Collaborating with Mary Kay Culpepper and Thomas Andahl. One of the valuable elements of the program is the enrichment of process and content by sharing with the cohort. The Supremes are extraordinary in their willingness and commitment to support each other. This project helps build relationships with two members of the cohort whom I admire but with whom I have not been partnered before.

- Understanding the competitive market place for tool building. This project lets me explore the extent to which my tools work beyond my personal implementation. Part of the process will likely include a deeper look at my facilitation style so as to understand the training components required to make tools approachable and usable by a more general audience.

- Building relationships within my research network. During my Big Question paper I reached out to my research network for feedback on several issues. Several, including some with whom I've had little recent interaction, have expressed interest and excitement in exploring the insight topic more fully. They will be available for perspective in reviewing the concept and reacting to the content.

Measuring Effectiveness:

Accomplishing the timeline and process steps are a sign of effectiveness in themselves; completion will be a mark of my effectiveness this semester.

The project plan includes key steps for product development and competitive assessment. These include some of the elements that I encourage my clients to conduct in their own product process. As such, applying the process to my own work will move

my product development forward and, when done in earnest, provoke empathy for my clients' process. Both will be valuable.

Evaluation:

I have a small cadre of marketing research and literary professionals who serve as a sounding board and reality check for me on a regular basis. Their candid feedback, along with that of my sounding board partner, members of the Supremes with whom I share my work will provide much of the external evaluation and guidance I receive this semester.