Market Research Toolkit

Investigate a customer or market question with a focused brief, a usable interview guide and evidence that leads to a business decision.

Start with the brief. Use only the methods needed for the decision. Duplicate the session, observation and finding records as your study grows. Edit the normal black answer text in Word; the PDF is a printable copy.

Research brief

The decision

What will we choose, change, test, hold or stop, by when and who decides? List the credible options, including keeping the current approach. What is at stake?

[Write here]

People and situation

Which customer need, business or offer, place and period are in scope? Who uses, chooses, pays or approves? What is outside this study?

[Write here]

Starting evidence and assumptions

What do records, customers or published sources already tell us? Add source IDs and dates. Separate what is known from what we assume; identify the important gap.

[Write here]

Questions that could change the choice

Write the few questions whose answers matter. What would support or weaken each option? A question such as Why did recent customers switch is more useful than Prove people want our new service.

[Write here]

Method and coverage

For each question, name the method or existing source, people to include, recruit route, owner and time or cost. Include relevant former customers, other-provider users or non-buyers, not only enthusiasts. Who may be missed?

[Write here]

Checkpoint

When will we review the evidence? Which missing perspective, contradiction or consequence would make a decision premature? What can this design support, and what will it not establish?

[Write here]

Customer interview guide

Before the session, check that the person has relevant recent experience and note their role and recruit route. Pilot the guide with a relevant person. Do not screen only for people who like the idea.

Opening and consent

We are learning how people handle [situation], including what does not work. This is research, not a sales conversation. You may skip a question or stop. We will use these notes for [purpose], with access limited to [people] and keep them until [date or rule]. Is that okay? Ask separately before recording; explain how the recording will be used and stored.

Ask about the last actual occasion

1. Tell me about the most recent time you faced [the situation]. What was happening?

2. What made you act or postpone? What happened next?

3. What did you actually do or use? What other routes did you consider, including doing it yourself or doing nothing?

4. What mattered when you chose? What did you trade off? Who else used, chose, paid, approved or helped?

5. What did it require of you in money, time or effort? What worked, and what was difficult?

6. Can you show or walk me through the relevant step, if you are comfortable and permitted to do so?

7. Was there another occasion when you handled it differently? What changed?

8. What have I missed or misunderstood?

Follow the account

Use their words: When was that? What happened before or after? Can you give an example? You said [word]; what did that mean? Listen before suggesting timing, price, quality or your preferred solution.

Test a proposed idea only afterwards

Only after the actual episode, show a clearly specified option with its price, conditions and limits. Ask what it would solve or fail to solve in that situation, what they would use instead and what would stop them. Record this as a stated reaction, not a purchase or a forecast.

At the end, check your understanding, ask for anything missed, thank the person and explain what happens to the notes. Use the next page to record the session.

Reusable session note

Copy this page for each participant. Give useful observations evidence IDs so findings can point back to them. Keep contact details separately; do not paste unnecessary personal information here.

Session and eligibility

Participant code, date, method, role and relevant recent experience. How recruited? Consent and recording permission. Keep names and contact details separately.

[Write here]

The recent episode

Trigger, sequence, actual route, people involved and result. Record what the participant reported; distinguish anything directly observed.

[Write here]

Choice and trade offs

Alternatives considered, criteria, cost or effort, obstacles and workarounds. Include why they did not buy, switched or stayed.

[Write here]

Their words and visible behaviour

Capture a short exact quote or observation with an evidence ID. Put a faithful paraphrase outside quotation marks. Do not collect unrelated personal material.

[Write here]

Reaction and interpretation

Keep any concept reaction separate from the episode. Then record our interpretation, uncertainty and follow-up, rather than blending them into the customer's words.

[Write here]

Study evidence register

Use this as the study-wide evidence register, not a separate register for every participant. Add observations from session notes, existing customer records and published sources. Give each record an ID, date, source type and context. Label existing extracts as existing evidence, not interviews conducted for this study. Copy rows as needed; keep the original session notes separately.

ID and source	What was said or observed	Context and limit

Finding and decision

Copy the finding record when more than one conclusion matters. Group related observations without losing IDs, and keep relevant contrary cases. Another person can challenge the interpretation before the decision.

Finding

State what the evidence means for this question, no more broadly than it supports.

[Write here]

Support and dissent

Cite supporting evidence IDs and relevant contrary or exceptional cases. What different context or explanation could account for the pattern?

[Write here]

Implication

What does this change about the choice? What remains unknown or needs another check? Repeated mentions in a purposive sample are not a population percentage.

[Write here]

Decision record

Our choice and reason

Choose, change, test, hold or stop. Link the choice to findings and evidence. Explain which option is not being pursued and why.

[Write here]

Next action

Name the action, owner, date and practical resource or delivery limit. Separate an intention or target from an observed result.

[Write here]

What will change the decision

Set a review point and the specific evidence, customer response or constraint that would lead us to continue, adapt or stop.

[Write here]

Other methods when needed

The brief, guide and records work without these methods. Use an additional method only when it answers an important question better than the evidence already available.

A short survey

If you need a survey, first define who is eligible and the recall period. Ask one neutral question at a time, with non-overlapping choices and Other or Do not know where appropriate. Pilot the wording and routing with relevant people. Report the recruit method and each answer's denominator; an open social link is not a representative sample. Do not add a conventional margin of error to self-selected responses.

For example, first ask whether someone personally arranged a relevant repair in the past six months. For eligible people, ask for their most recent route and whether getting the item there or back caused a problem. Ask one issue at a time; pilot the answer choices and include a route for no experience or no difficulty.

A market size estimate

If market scale matters, define the customer unit, offer, geography, period and revenue or volume basis. Record the source, coverage, age and assumptions. Keep compatible units, avoid overlapping segments and show a useful range. Capacity is not demand, and an invented capture percentage is not an obtainable market.

Using the same kit elsewhere

For B2B research, include users, buyers and approvers and recent wins, losses or no-decisions. For retention, distinguish the normal buying cycle from a genuine loss and speak to former or reduced-use customers. For a new venture, investigate existing alternatives and behaviour before asking for reactions to the idea.

Method guidance

business.gov.au Do market research
business.gov.au/marketing-and-advertising/do-market-research

GOV.UK Using in depth interviews and Analyse a research session
www.gov.uk/service-manual/user-research

Pew Research Center Writing survey questions
www.pewresearch.org/writing-survey-questions/

Established research practices. Original Navigate instruments and explanations.