



The Case of the Elusive Insights

Lessons from the greatest
researcher of them all!

*By: Achala Srivatsa,
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Inspiration through disruption

Crime and its corollary, crime detection, have forever fascinated us. They have given rise to the whole genre of detective fiction, which despite having epithets like ‘penny dreadfuls’ hurled at it has survived and thrived and given the world a host of detectives – some tough talking, some sensitive and accented, some laconic and others quite iconic, chief among them Mr. Sherlock Holmes of Baker Street.

Why is detective fiction so fascinating?

Firstly, it begins with a situation where the ordered society is disrupted by the commissioning of a crime, which could range from a common theft or a grisly murder to some other, fairly exotic ones. Consequently, as readers, we are introduced to a rich and imaginative chemistry of people, geographies and contexts that at once informs, excites and intrigues us.

Secondly, it is engaging. Even the worst of the ‘whodunits’ invites the reader to participate and try and solve the crime before the author does it with a flourish in the last page. It is extremely difficult to read a good mystery passively.

Thirdly, it documents the changing social mores and trends and unerringly brings to the fore the values, beliefs, and motives that lurk beneath the civilized veneer of society.

And finally, it allows the reader a glimpse into and an appreciation of the skills of an ‘expert’ ... someone who is able to look at the elements of a puzzle differently from the norm and suggest previously unthought of, often fantastic, but completely credible solutions.

Detective fiction, thus, provides its reader with intellectual stimulation and a compelling invitation to journey along into a saga of puzzling conundrums with the comforting carrot of an answer in the end. The parallels with the researcher’s journey – in finding, honing and describing compellingly the elusive insight or the ‘answer’ to a business problem – are quite apparent.

This disruptive and intrusive form of the detective novel has been consistently adopted by the more ‘literary’ writers and filmmakers as a framework for the investigation of questions of identity and moral or political dilemmas. It is also a form adopted by psychologists and spiritualists for triggering more fundamental “inner” quests. Examples range from ‘The Hero’s Journey’ (Joseph Campbell) to more popular psycho-spiritual works like *The Alchemist* (Paulo Coelho).

We would like to argue that detective fiction offers a powerful framework for researchers to borrow from, not just as a source of inspiration but also as a way of thinking about our role as ‘problem solvers’, a reminder of the essentials of the insightful process from problem definition to final solution, and a lesson in telling our story well. Adopting it would bring in a distinctive flavour to insightful; bring in the excitement and the enthusiasm necessary to convert insight-chasing into a rollicking intellectual ride rather than ‘just another project’.

Defining an insight

Let us begin with our view of what constitutes an ‘insight’, and then look at the parallels we find in the way the detective novel structure is set up to search for an insight.

There are several definitions that most of us have probably used at varying points of time, and all of them are useful in different situations. Some examples:

- A not-yet-obvious discovery
- A unique and fresh perspective
- A penetrating view of the obvious
- A competitively advantaged idea

A true Insight actually has elements of each of these, and pared down to the bare minimum could be quite simply defined as –

A clear, deep and permanent perception of the fundamental truth on which a situation turns.

It could come from a sudden understanding of a complex problem which one has been analyzing or from an intuitive grasp of the inner meaning or it could be an idea (a ‘reality’ or a ‘possibility’) about the situation or the consumer that was not previously obvious to us, that leads to a fresh perspective on a business problem and / or a competitively advantaged solution.

But our perspective of an insight is a step beyond this ... it is not about ‘what’ but about ‘how’. Multiple small ‘insights’ can be found by a discerning eye in various parts of the data, but Insight (with a capital I, in the single rather than the plural sense!) is the single big idea that often continues to elude us. It is this Insight with a capital I that we are chasing after, and that we believe comes from a mindset and a way of working rather than specific tools or outcomes ... from rigour, commitment and passion for the chase, and a simple ability to interpret what we find in the larger context. It is here that we believe we have the most to learn from detective fiction.

The starting hypothesis in a detective story is that there is only one solution which is right. The entire story is then woven to reach that conclusion. While in business, though a problem may not have a single solution (as we do not exist in the utopian world of fiction) it is useful to adopt the spare framework adopted by detective fiction writers and start with the premise that there is only one single insight that will provide the truest, most far reaching solution to the problem at hand.

Learning from detective fiction

The structure of a detective novel can be broken down into five stages:

- The problem
- The data gathering or getting down and dirty
- Observation and the assimilation of atmosphere
- The analysis or the piecing together of the jigsaw
- Imagination and the balance of probabilities.

And striding like a colossus through it all is the protagonist, the amateur detective whose personality embodies all the qualities that are necessary for a dramatic solution at the end of the story.

As researchers we are in the business of finding answers. The lessons from the greatest (arguably) detective of them all are particularly pertinent to those of us who have been repeatedly challenged and sometimes frustrated in our pursuit of that slippery insight. There are learnings in those highly entertaining chronicles on everything from the personality of the researcher to the avoidance of the mistakes that one may commit when pursuing an insight. But the greatest lesson of all is the energy and excitement that is brought to the whole process.

Join us, then, on a journey to the elusive insight with Mr. Sherlock Holmes, Consulting Detective, 221B, Baker Street.

The Researcher or the hero

Let us begin with the researcher. What are the qualities that are considered most desirable in a researcher of worth? How many times have we in our daily dealings with research problems and researchers been able to identify a 'good' researcher from an indifferent one? Intuitively we seem to recognize quality, a curious mind and wisdom in a researcher ... but we also find that there is no certain way in which to set the good apart.

Mr. Holmes calls himself a 'Consulting Detective'. The title itself classifies him as the expert and is suggestive of the role that he plays. Not only does it suggest the confidence that comes from the immense reservoir of knowledge that he possesses and the finely honed talent for deduction, it also serves to distance him from the ranks of the police who typically are characterized by their lack of imagination. The Holmesian personality probably depicts an exaggerated version of the characteristics that are required of an avid researcher – the constant need for mental stimulation, the almost manic focus on the problem at hand, the vast reservoir of knowledge that he has and frequently dips into, a cavalier lack of interest in anything outside his range of activities and the disregard for creature comforts when on a case.

"My mind rebels at stagnation. Give me problems, give me work, give me the most abstruse cryptogram or the most intricate analysis, and I am in my own proper atmosphere. I abhor the dull routine of existence. I crave for mental exaltation."

While these may seem like extreme traits, the intense curiosity, dedication and an analytical mind clearly are mandatory requirements for a researcher. When referring to the French detective Francois Le Villard, Mr. Holmes says:

"He possesses two out of the three qualities necessary for an ideal detective. He has the power of observation and that of deduction, He is only wanting in knowledge, and that may occur in time..."

Along with observation, knowledge and deduction, the ability to tell a compelling story is an important part of a researcher's armory; a researcher who is a brilliant analyst but lacks the skills to put it in words is useless. A large part of Mr. Holmes' brilliance could be attributed to his faithful raconteur, Dr. Watson. Mr. Holmes may often scoff at Dr. Watson's romantic language, but without the rich tapestry of his narration, Mr. Holmes' exploits would have remained unsung and unheard. As he himself says in 'A Study in Scarlet'.

"What you do in this world is a matter of no consequence. The question is, what can you make people believe that you have done?"

In the delivering of an insight, the right language is paramount. The right words, the right amount of colourful context to engage the audience but not so much detail as to bore or befuddle ... all of these form part of the well-crafted insight. Presentation may make all the difference between an insight that sticks and forms the turning point, and an insight that is rejected, "Because, well, the way you put it, it doesn't really sound so profound does it?"

Beyond the language, is also our role... the endeavour for some time now in our industry has been to go beyond the traditional role of data collector to that of a Consulting Researcher. And this we can only execute armed with the insights, the context, the language and the delivery.

The contemplation of the problem:

1. **The statement of a problem** is the most crucial in any investigation. When Mr. Holmes urges the Client to, “Pray proceed, omitting no detail however slight” he is stating that he is going into the problem with an open mind. What a client may consider trivial may very possibly turn out to be the key point on which the whole mystery turns. For a researcher this statement has critical implications. When a client calls for a meeting on a research brief, quite often the tendency is to give a methodology led one: “I’d like to have a product test done on three new flavours that we have developed”. Off goes the researcher, conducts the test, identifies the winning flavour, client launches it and finds to his dismay that it fails dismally. Why? Turns out, the flavours were developed to try and revitalize an ageing product category and brand. In the product test, the familiar flavours - orange and lemon - won over the more exotic, but what was needed was the exotic flavour to boost the category image. Had the researcher chosen to look beyond the brief and asked a simple question on why the flavours were being made, it may have led to a clearer brief which in turn would have led to a research design which was more appropriately designed to cull out the real insight, which was that the consumers were bored and something rather more than flavour extensions were needed to set fire to the category.

It is also important to discriminate between fact and bias in a research brief because the subtle biases that creep into a client’s narration may actually influence us in our analysis of and statement of the problem. The deeper we dig at this stage, the better we will be able to ‘frame’ the problem and design the research to answer the real issues.

2. **Thinking about the problem** from every angle is important before one can begin the pursuit. While we may always try to be objective, the way a problem appears is always affected by the position that we view it from. And once we take a position on a problem, then we will always find it difficult to move away from the position and may end up constantly seeking an affirmative to that position in the data. Mr. Holmes is emphatic on this point:

“It is a capital mistake to theorize before one has data. Insensibly, one begins to twist facts to suit theories, instead of theories to suit facts.”

It is at this stage again, that a metaphorical Dr. Watson is useful. Dr. Watson’s constant befuddlement is used as foil in the chronicles to bring Mr. Holmes’ deductions into brilliant relief – a technique subsequently followed by a lot of mystery writers. Bouncing the problem off other researchers / marketing people within the organization and asking seemingly stupid questions of the client may all bring in perspectives that are unusual and hold the key to the problem. In “The Silver Blaze” Mr. Holmes tells Dr. Watson:

“Nothing clears up a case so much as stating it to another person.”

3. Drawing parallels with other problems researched, sometimes from other categories, can also be very illuminating. Mr. Holmes claims to solve the majority of his cases without leaving his room, drawing on his wealth of knowledge of criminal cases.

“Nothing is completely new. It has all been done before”

Drawing parallels with other problems could result in a redefinition of the problem itself, a redefinition of the research design, or even a rethinking of the need for research (i.e. we may have enough information from previous research, and may just need to brainstorm its application to the current problem).

In designing a research plan for an NPD initiative, we have found it useful to study past NPD successes (for ‘best practice’) and past NPD failures (for clear directions on what to avoid). While agonizing over how to hasten upgrades among mobile handset buyers, we have drawn upon our knowledge of upgrades in other categories like cars, entertainment electronics, fashion etc – which added some useful hypotheses to test in the data gathering process. And in a study to increase penetration of a high-end skin care brand, we drew from learnings on a similar issue to do with hair colorants, and modified the design of the study to include beauty consultants.

This, the first stage of the entire process of insight generation is often the most neglected. But it is here that the fundamentals are laid for the capturing of that elusive insight. If the framework drawn in the shape of a research design is in error, there is no way in which the processes of data gathering and analysis that follow can hope to generate ‘true’ insight.

The data gathering or getting down and dirty:

“Data! Data! Data! I can’t make bricks without clay.”

... is a statement that underlines Mr. Holmes’ belief in the power of good data collection. His analysis was a happy mix of deductive and inductive reasoning, which demanded that in several cases, without hard empirical data, he would refuse to form any conclusions. In fact, in the ‘Silver Blaze’, he admits to making an error:

“I made a blunder my dear Watson – which is, I’m afraid, a more common occurrence than anyone would think who only knew me through your memoirs.”

In his analysis of the case, based on what the newspaper reports talked about, he had formed certain hypotheses, but was perfectly willing to revise them if he found that the data did not validate it. This is an aspect that – as contemporary researchers in world that is far more complicated than the world Mr. Holmes inhabited – we need to understand and imbibe. There has to be a willingness pick all the nuances that the data has to offer. In the crowd of data gatherers only those who look and gather data with an open mind can even claim to be on the path of generating a true insight.

1. Breaking methodology silos: We acknowledge today that insights are rarely found in methodology silos. Being open to all sources of data and integrating multiple methodologies is an essential in our pursuit ... the ‘bricolage’ era, as Wendy Gordon puts it, is here to stay. In his chase of the culprit, Mr. Holmes uses a fascinating mix of methods including ‘immersion’, a word that is today rolled deliciously around every researcher’s tongue. A master of disguises, he frequented the opium dens and posed as the boyfriend of a domestic staff in order to live and feel the situation. As a nineteenth century example of recognition of the importance of context, his methods are as yet unparalleled. The context for today’s business issues is the multiplicity of categories, where not only do brands compete within the category but also across.

Set this against a rapidly changing consumer and ballooning retail and you have a Molotov cocktail that can either explode into an insight if observed and docketed in detail or end up as a damp squib. Looking beyond a brand and at the consumer and the context becomes not just important, but an imperative. Unconventional methods of data collection are necessary to lead us closer to that singular truth by providing us with a first-hand, more accurate feel. For example, in a recent multi-cultural youth study, we found some tentative differences in the attitudes of one of the cultural segments that we were studying, but not enough data from the focus groups to be entirely sure. We decided to test our hypotheses by studying weblogs of youth belonging to the community in question ... these blogs provided a rich tapestry of attitudes and values that not just validated our tentative hypotheses, but also added considerably to our understanding of the community and to the confidence with which we presented our recommendations.

Another excellent example of unconventional data gathering methods was a study on new product development in the arena of child snacking products. In addition to connecting with children in focus groups, the researcher went to schools to study children during their lunch break ... also in the bus rides back home (our version of Mr. Holmes' "immersion"). Integrating this data with what children told us in focus groups provided a far clearer picture of when, how and what they liked to eat.

2. Searching for patterns: It is after all a capricious, notoriously unpredictable consumer that we are researching. As an individual, he will always confound us with his contradictory behaviour – a man who drives a Mercedes can, with equal ease, reach for a bargain at a post Christmas sale. How then, can one break down the data and reach for that fundamental truth? Mr. Holmes shines a light on this one:

“While the individual man is an insoluble puzzle, in the aggregate he becomes a mathematical certainty. You can, for example, never foretell what any one man will do, but you can say with precision what an average number will be up to. Individuals vary, but percentages remain constant. So says the statistician.”

Sociology and statistics are strong weapons in the hands of a researcher at this point. The erratic behaviour of one Mercedes driving individual may frustrate us with its contradictions, but if in a sample of 100 Mercedes drivers we find the same bargain basement behaviour, we can conclude for sure that every individual, however wealthy, loves a free lunch. Sociologically speaking, again, while an individual may be inconsistent, societies on the whole are consistent. So when one is staring frustrated at a wall of individual contradictions, the way to break that wall is to look for consistencies in the group. Somewhere, at some level, there are bound to be consistencies that will give a clue. If that doesn't happen, then the data has not been collected right. Go back to the field, deerstalker on head and magnifying glass in hand, and collect the data all over again.

3. Sifting the grain from the chaff: Apart from the behavioural contradictions, researchers know only too well how consumers are apt to say one thing and then do something totally the opposite. This is a potential minefield where many a researcher has blown up all chances of putting the finger on an insight. The trained researcher here can sift through the babble of politically correct or socially desirable speech, to arrive at behavioural patterns and motivations that are truer and a better explanation of why potato chips and candy are such huge industries, for instance! When the horse Silver Blaze disappears and its trainer is found dead on the moor, Mr. Holmes, while trying to make sense of the entire mystery says,

“We are suffering from a plethora of surmise, conjecture and hypothesis. The difficulty is to detach the framework of fact – of absolute, undeniable fact – from the embellishments.”

4. **Being sure:** And what of the errant piece of the jigsaw that doesn't fit when all else does? What does the researcher do? Brush it aside, because 99% of the data fits the theory? The results will have the makings of a fine story, but little else. This is the point at which a passionate researcher will take that piece in the jigsaw that doesn't fit, worry over it and try and retrace steps back to why the fact does not fit. In doing so, he may then stumble on to the trail of the true insight. In the 'Study in Scarlet', Mr. Holmes says,

"When a fact appears to be opposed to a long train of deduction, it invariably proves to be capable of bearing some other interpretation."

Grounding of theories in the data is the hallmark of a good piece of research. Even when that final leap of imagination is taken, the leap needs to be based on hard fact. Consider this. In a study of beverage alcohol retail, exit interviews revealed that negligible number of consumers recollected point of purchase advertisements in the shops. Yet when tracking consumers independently, it was revealed that more than 40% quoted shop P-O-P's as a source of information on their brands. The track data was dismissed as being something that the consumer 'just said', the thinking being that exit interviews at the shop being immediate would be far more authentic. The decision at this point could have been to not invest in P-O-P's. Yet when this data was taken in conjunction with the ban on TV advertising for beverage alcohol, it was clear that the P-O-P advertising was a huge potential source of information for the consumer. Why the consumer did not recollect them was because of the form (paper posters). He definitely recollected all brands which had innovative clutter breaking forms.

Observation and the assimilation of atmosphere:

Mr. Holmes' powers of observation are fundamental to his personality, and so, we believe, they need to be to that of a researcher. We refer to 'observation' here not as a 'technique' of research, but as an essential philosophy that underpins all our data-gathering and interpretation techniques.

Most of the common definitions of an insight revolve around this critical faculty:

- "A penetrating view of the obvious"
- "Clear or deep perception of a situation"
- "Seeing what others do but thinking something different"
- "Seeing new patterns and relationships between elements of a situation, leading to new understanding"

Observation and the assimilation of atmosphere lay the ground for translating data into insights. They prepare the researcher for spotting interrelationships between various parts of the data, for adding meaning to the data, and for going beyond what is obviously evident.

1. Knowing the difference between 'seeing' and 'observing'

is extremely critical and will make all the difference between delivering a true insight and simply delivering a 'finding'. In our data gathering role we see everything, but how many of us really observe what we see? What is the difference really? In 'The Adventure of the Blanched Soldier' Dr. Watson tells Mr. Holmes, "Holmes you see everything."

He says, "I see no more than you, but I have trained myself to notice what I see."

We all know this, of course. Young qualitative researchers can probably recite lessons on being sensitive to non-verbal cues, on not taking things at face-value, of looking for the 'so what?' in 'facts'. But the practice of what we know is far more difficult. The training of one's faculties to notice the difference is a life-long one, according to Mr. Holmes.

“Like all other arts, the science of deduction and analysis is one which can only be acquired by long and patient study ...let the inquirer begin by mastering more elementary problems. Let him, on meeting a fellow mortal, learn at a glance to distinguish the history of the man, and the trade or profession to which he belongs. Puerile as such an exercise may seem, it sharpens the faculties of observation and teaches one where to look and what to look for.”

2. Breadth of knowledge is of essence in the soaking up of atmosphere. Everything that we see then is carefully contexted and docketed in a particular perspective. While detachment is necessary in the observation of problem so that emotional biases do not colour what we see, it is knowledge that allows us to make the connections and notice what we see. The search for knowledge never stops.

“In my profession all sorts of odd knowledge comes in useful, and this room of yours is a storehouse of it.”

It is one thing to earnestly go after every piece of information once a problem has been presented. This is good. But the difference between a good researcher and a superlative insight hunter comes from the hunter's ability to absorb and imbibe knowledge from any source and any time. In fact, constantly. One of the things that old-world researchers find themselves lamenting about “today's researchers” is the decline of reading as a discipline and a habit. As an industry, we need to ensure that we are continuously bringing ‘knowledge-seekers’ into the fold. We also need to develop breadth of knowledge as an industry, by thinking beyond the business schools and consciously recruiting from diverse backgrounds. This is a policy that has usually stood us in good stead. In one of the teams within the company, we currently have 2 engineers, a psychologist, a sociologist, a journalist, a dancer, a potter and one ex-banker, and use the services of an aspiring actor on a freelance basis!

“Problems may be solved in the study which have baffled those who have sought a solution by the aid of their senses. To carry the art, however to its highest pitch, it is necessary that the reasoner should be able to utilize all the facts which have come to his knowledge, and this in itself implies, as you will readily see, a possession of all knowledge, which, even in these days of free education and encyclopedias, is a somewhat rare accomplishment.”

The best example of the integration of data, observation and knowledge comes from the chronicles themselves. In the “Sign of Four”, Mr. Holmes reveals to Dr. Watson his hypothesis regarding the Andaman Island origin of the small-footed, club wielding, poison dart shooting companion of Jonathan Small. Mr. Holmes deduces the ethnicity of the murderer using the data derived from his observation at the crime scene, the stated location of the prison where Jonathan Small was jailed (Andaman Islands) and the knowledge he gained about reading about the primitives in his gazetteer.

3. Finally, the importance of context is something that Holmesian methods bring to the fore. When faced with a problem that demands a solution it is important to not just focus single mindedly on it, but to also bring one's peripheral vision into play. What is the larger environment in which the problem has occurred? What are the various consumer groups who come into play? What is the history/ has there been a parallel? What are the cultural rules and behaviours that apply here? Indeed, what is bricolage but a means of providing context and logic?

It was his ability to get into the skin of the character or class of people in order to better observe them which gave Mr. Holmes the edge. For us as researchers it is a lesson in how to move away from our armchairs and go out on the streets to fine tune the ability to observe and to get first hand knowledge. In doing this we sharpen our insight hunting instincts and set the stage for the final leg of insight garnering.

The analysis or the piecing together of the jigsaw:

Now we come to the most absorbing and intellectually stimulating part of the investigative process. This is the part where we form the connections, apply logic and start filling in the blanks to form a complete picture. As in a jigsaw, the more pieces we can find, the easier it is to infer what the big picture will be. So if all the earlier steps have been carried out in accordance with the Holmesian canons, then this is when we begin to get a glimpse of the final solution. Are there patterns in the problem that enable us to see its cause? How are all the pieces linking up to each other, and what effect do they have on the overall picture?

“Each fact is suggestive in itself. Together they have a cumulative force.”

1. The importance of logic in the reasoning process cannot be over-emphasized. The logical process followed in detection is a powerful format to follow when reasoning out a business issue as well. The Consulting Detective sifts through all the data at his disposal, and classifies the data as crucial and pertinent or mundane. Once this is done he draws a logical sequencing of events that lead up to the crime and the events that follow. Post this he forms a few hypotheses and tests out these theories by either indulging in some foolhardy tempting of the suspects to get them to reveal themselves, or else passively works it out for himself. In some cases he works out a few theories based on first impressions and then goes out to look for the data to corroborate these theories. Then in the end comes the final denouement.

“It is of highest importance in the art of detection to be able to recognize out of a number of facts which are incidental and which are vital. Otherwise your energy and attention must be dissipated instead of being concentrated.”

The underlying precept in logical theory is that all that happens is linked together and logic is used to detect the

pattern and the entire chain of events. This is true for any business problem that we encounter as well. Whatever happens, happens for a reason and is the end result of a chain of events set in motion by a disruption or a trigger. Once we reason out this trigger and are able to create an argument without any holes, we have our insight. But for this there has to be objectivity, an ability to detach oneself from the data on hand.

“Detection is, or ought to be, an exact science and should be treated in the same cold and unemotional manner.”

What this means is that one should as a keen researcher totally eliminate guesswork from the reasoning process. The famed ‘gut feel’ is famous not because of the success of various random hunches in the solving of problems, but because it has been based on solid fact. It is important to remember that ‘gut feel’ or ‘intuition’ is quite different from ‘guesswork’. Intuition is a mode of thinking and problem solving, which, when allowed to take over after an immersion in all the data, facilitates a leap of consciousness to likely solutions. It is, in fact, the absence of guesswork that allows us the confidence to make this intuitive leap of consciousness!

“No, no I never guess. It is a shocking habit – destructive to the logical faculty.”

The absence of guesswork also allows for sure insight as opposed to tentative possibilities, and brings about the confidence to back even the most incredible, seemingly fantastic solutions. How often do we find that a piece of research goes against everything else that the client knows or believes about the category? Being sure of what we are saying can make all the difference to the action taken basis the research in such situations.

Once the data is assembled the logical reasoner goes through the process of elimination and exclusion. Each probability is carefully examined and eliminated either because the evidence does not support it, or because it is an impossibility.

“... When you have eliminated the impossible, whatever remains, however improbable, must be the truth”

It is telling that we could not think of many examples from our work that illustrated this particular reasoning process completely. As one of our colleagues said, if we could actually have the confidence in our data, our knowledge and our judgment to “eliminate the impossible” and zero in on “the true answer” we would be a very different industry!

Of course, it is unlikely that we as an industry can actually hope to eliminate the impossible ... we are, after all, in the business of probabilities and possibilities, and we are dealing with more complex, dynamic and unpredictable raw material than Mr. Holmes did. However, this is a tenet that we believe should remain a source of inspiration – a goal for us to work towards. If we could even have the confidence in our data and our judgment to arrange possibilities in a decreasing order of improbability, we would be well on our way to ‘sure insight’.

2. The reasoning process itself can be either inductive or deductive and there are a lot of papers that argue about whether Holmes’ reasoning process is deductive or inductive.

In inductive reasoning the theories and hypotheses are drawn after the data is gathered, whereas in deductive reasoning, the hypothesis is formulated first and the data to either affirm or negate the hypothesis is looked for. The arguments for both rage on unabated, but several have concluded that in fact, Mr. Holmes uses a mix of both. He often rails at one or the other method – at one point he says that it is a mistake to theorize without data – thus supporting the inductive reasoning process, and in yet another situation, in ‘The Adventure of the Copper Beeches’, he is clearly doing the opposite and using deductive reasoning:

“I have devised seven separate explanations, each of which would cover the facts as far as we know them. But which of these is correct can only be determined by the fresh information that awaits us.”

When we as researchers delve into the framework of Holmes’ reasoning to determine which of the processes would yield the best dividends, we find that he indulges in an exhilarating anarchy of reasoning where he uses one method of reasoning in one case, and the other in another, and sometimes a combination of the two with mostly spectacular results. We would urge you to focus here on the spectacular results. For us researchers, this is where, like the amateur, sorry, Consulting Detective, the final thrill lies. Therefore, it might be not only prudent but mandatory on our part to not argue about the science of the thing but to adopt Holmes’ ‘abductive’ (a name coined to label Mr. Holmes’ free ranging reasoning style) reasoning. We are usually faced with problems or situations in our business where we have to find the most likely cause for the problem occurring. We need to develop Mr. Holmes’ skill in reasoning backwards.

“In solving a problem of this sort, the grand thing is to be able to reason backward. That is a very useful accomplishment, and an easy one, but people do not practice it much. In the everyday affairs of life it is more useful to reason forward, and so the other comes to be neglected. There are fifty who can reason synthetically for one who can reason analytically.”

The idea in backward reasoning is to lead back from the given problem to the simpler constituents – a typical cause-effect relationship. A problem is always made up of several facts or effects; we go backward in search of their unknown causes and by a process of exclusion and elimination reach the right cause. Of course this could be the broad basis for the culling out of an insight. But then again, the focus happens to be on the result. In which case, taking a leaf out of Mr. Holmes’ rather successful career, we choose to reason forward as well. In fact, as long as the reasoning is logical and based on data, as insight gatherers, we are on the right track.

Imagination and the balance of probabilities:

Using the framework of detective fiction, and specifically, the methods of Mr. Holmes, has provided us with a rough but steely framework of our own for the process of insight hunting. But there is one last aspect which has been left untouched so far and that is the abundance of imagination and the vividness with which the final triumphant result is unveiled. There is always that little gap between the results of the careful and painstaking data collection and analysis and the announcing of the culprit to the awestruck Dr. Watson and the police. The explanations that follow are usually bipolar. Quite often, despite his love of logic, some of the results are based on Mr. Holmes' intuition and imagination and his hawk like powers of observation alone. This happens and is acceptable because he is so steeped in the culture of the city and its people, so confident of his data, that he can make that leap of imagination with arrogance.

"I cannot agree with those who rank modesty among the virtues. To the logician all things should be seen exactly as they are, and to underestimate one's self is as much a departure from truth as to exaggerate one's own powers."

The second explanation for his almost magical deductions is the balance of probabilities. Here, Mr. Holmes uses his imagination to choose between causes or theories that might at first glance seem equally probable to pick the most likely.

"We are coming now rather into the region of guesswork," said Dr. Mortimer.

"Say, rather, into the region where we balance probabilities and choose the most likely. It is the scientific use of imagination, but we always have some material basis on which to start our speculation."

The balance of probabilities is something we may always need to do in our own insight hunting. Problems of business seldom fall sweetly into the neat little silos of information that are depicted in the detective stories. They are mostly messy and leave the insight hunters tearing their hair out in frustration over several theories that may fit the bill. This is where the hunter needs to develop the confidence that comes from the knowledge that no stone has been left unturned (literally!) in the attempt to get all the information possible and the trust in the data, to use the gut feel (yes, finally) to balance the likelihood of each theory being the truth and take that final leap to put the finger on that glorious insight. This is the point where we effect the transformation from the stern scientist into the opera star and dazzle the audience not just with our virtuosity in hunting the insight, but also with our flair in presenting it.

Practicing what we preach: A case study

Our framework is intended as a guiding philosophy and source of inspiration for the insight generation process, rather than a series of steps to adhere to religiously. It is unlikely that all parts of the framework would be put to use in every research situation ... instead, we have found that various aspects of Holmesian methods can provide the turning point for us, depending on the problem. Here, for example, is a case study that illustrates the importance of a) breaking methodology silos in data gathering; b) context; c) breadth of knowledge and d) imagination and balancing probabilities.

The marketing problem:

ABC is one of the biggest brands of whiskey in India, targeted at lower middle class drinkers. It has traditionally had an earthy, masculine persona, and has connected with its target group by catering to their need for escape and fantasy, their need for control defined as machismo and brute strength, and their need for comradeship and bonhomie. While the last of these is a need expressed across socio economic classes, strength and machismo tend to be associated with drinkers lower down the socio-economic strata.

Some years ago, ABC began to face competition from new brands that targeted the 'emerging' consumer in India ... slicker, smarter, more 'global', more upwardly mobile (in aspiration if not in reality). The new brands recognized the change sweeping across middle class India, and spoke a language that connected with the emerging 'upper middle class' sensibilities. While ABC was acknowledged as a large, renowned brand, it also seemed 'beneath' the new-age, younger consumer who was drawn to the slick-and-smart wrapping of the newer brands.

Marketing thinking was divided. One school of thought felt that if the brand did not keep up with the Joneses and smarten up its act, it was bound to slowly die while consumers by passed it for the slicker offerings. Another, the older school of thought, largely comprised of those who had seen the brand grow from infancy, was reluctant to change it drastically for fear of losing the strong franchise from its ageing core of consumers. They had no answers, though, for what was to be done to attract the newer consumers who were venturing into whiskey and bypassing ABC. The modern school of thought also argued that since the loyal consumers were ageing, the likelihood of their shifting out was minimal, as by that age the brand had become a compulsive, unexamined habit.

Research was expected to then provide an actionable direction for the brand – one that was not a compromise, but would yet satisfactorily answer the questions raised by the ongoing debate between both the 'old ' and the 'new' schools.

Problem definition and data gathering:

- While designing the research, we were conscious of not just getting the consumer's point of view on ABC and other brands, but also understanding the 'changing consumer' in a broader context. The research therefore had a heavy ethnographic component, where we spent time in consumer homes, social spaces and drinking contexts.
- We also did some 'desk research' on the lower SEC consumer, to understand the degree and nature of the change that was actually occurring. Our understanding of this consumer from other categories that we had researched was also incredibly useful here.
- Numbers were important to back whatever hypothesis emerged. A large scale quantitative exercise was also undertaken to understand the demographics and the cultural predilections of the brand.

Analysis, the balance of probabilities and the fitting of the jigsaw:

- Consumer discussions that were focused on the brand did indeed suggest that the ABC needed to 'spruce up' its image in order to remain relevant to the changing consumer; importantly, it needed to let go of the earthiness and machismo that was so central to its persona.
- However, an understanding of the social context (through ethnography, reading, and conversations with sociologists) told another story. We found that ABC commanded the greatest loyalty from people who saw themselves as 'left behind' in the 'India Shining' story; people who, because of their limited skill sets, resented the change, because the progress all around them made their inadequacy stand out in stark contrast. People who turned to and aggressively clung to their roots and machismo, as the only things they had in defense against the sweeping changes of which they were not a part. And this, confirmed the numbers exercise, was a large, large segment, even among those 'new' entrants into the category.
- ABC was a comrade, a brand that reflected who they were, and one that made them feel comfortable in their skin. Giving ABC the slickness desired by the new-age consumer would have been a betrayal of its core franchise.
- It would have been easy to go by the focus group feedback and suggest an image overhaul for ABC. However, it took an understanding of broader social issues, and knowledge of how consumers were behaving in other categories, to go against the tide and reaffirm an age-old identity. Looking at the larger context within the company also helped. The company had other brands in its portfolio that were targeting the new-age consumer ... but there was no one else even thinking about the 'left-behind consumer' and his needs. It was here that the big 'Insight' lay.
- ABC was a brand that did not need to be apologetic about its strong, earthy, macho image. In fact, that was the brand's core identity. The final decision on what the direction would be was taken after pitting the probability of the consumer's need to be seen with a 'smart' brand versus the probability of the need for a brand to support his macho status.
- The insight that the brand reaffirmed the consumer's machismo in a world where he felt emasculated, led to the decision to stay with the core of the brand rather than make it slick, and instead make machismo and earthiness a highly desirable trait for the new generation.
- Today, that courageous decision stands vindicated. ABC is the only brand that is growing at 13% in the otherwise stagnant category.

The conclusion or the Last Bow:

In conclusion, what we want to say is something very simple. We have attempted to create a framework for insight hunting by studying the genre of detective fiction and specifically the brilliant chronicles of Mr. Sherlock Holmes of 221B Baker Street. In this, we hope to have succeeded in stimulating thought on the very different ways in which insights can be hunted down. But the most important take-away from this genre is the thrill, the excitement, the rigour and the suspense that is brought into the chase. From the time he shakes Dr. Watson awake, his eyes alight, with “Come Watson come, the game is afoot!” to the chase and the final curtain, there is an infectious, eager enthusiasm in the quest for the truth. But the enthusiasm is focused, not misguided. There is an almost ascetic adherence to the discovery of the truth:

“There is a scarlet thread of murder running through the colourless skein of life, and our duty is to unravel it, and isolate it, and expose every inch of it.”

It is this focus and passion that we need to infuse into our search for insights. Without this the process will descend into the commonplace and the mundane and become yet another research project. As usual, Mr. Holmes expresses it beautifully:

“Man, or at least criminal man, has lost all enterprise and originality. As to my own practice, it seems to be degenerating into an agency for recovering lost lead pencils and giving advice to young ladies from boarding schools.”

Ladies and gentlemen, let's keep the thrill alive ! ■

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The Case of the Elusive Insight

Lessons from the greatest researcher of them all!

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