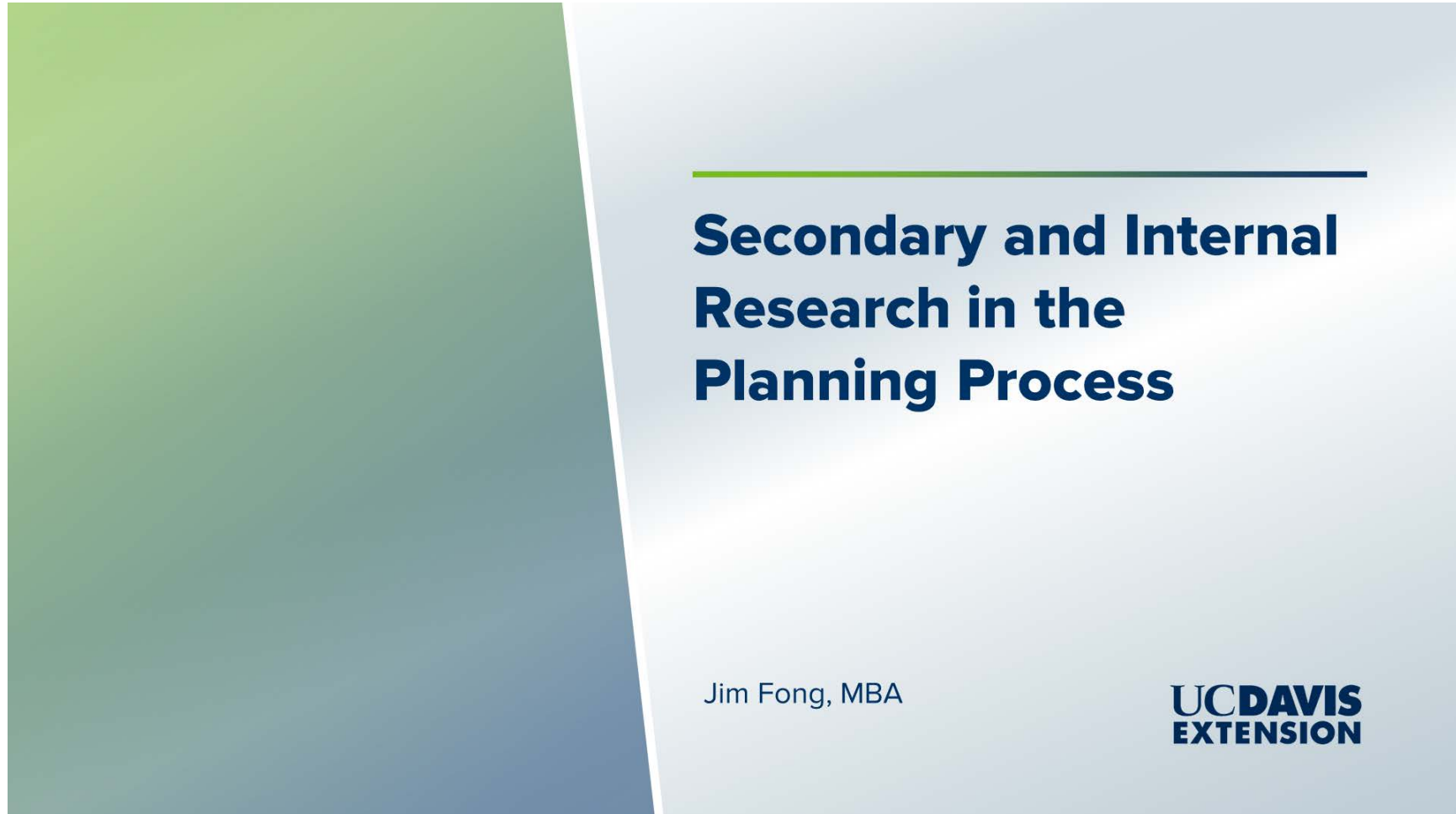


Lesson 2.3: Secondary and Internal Research in the Planning Process

Slide 1: Secondary and Internal Research in the Planning Process

The slide features a light blue background with a green-to-blue gradient on the left side. A horizontal line, with a green segment on the left and a blue segment on the right, is positioned above the title. The title is in a large, bold, dark blue font. Below the title, the presenter's name is displayed in a smaller, dark blue font. In the bottom right corner, the UC Davis Extension logo is shown in dark blue.

Secondary and Internal Research in the Planning Process

Jim Fong, MBA

UC DAVIS
EXTENSION

Slide 2: Learning Objectives

Learning Objectives

Determine value and credibility of secondary research

Describe value of internal research for early determination of the research approach

Slide 3: Defining Secondary Research

Defining Secondary Research

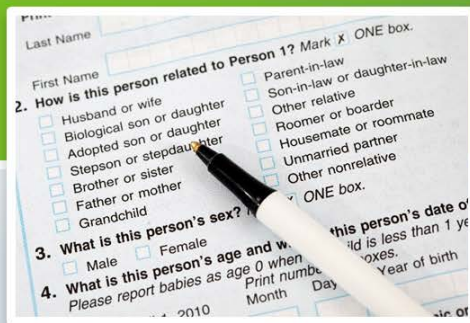
“The use or collection of existing or past research.”

Data has already been collected in the past or for another purpose

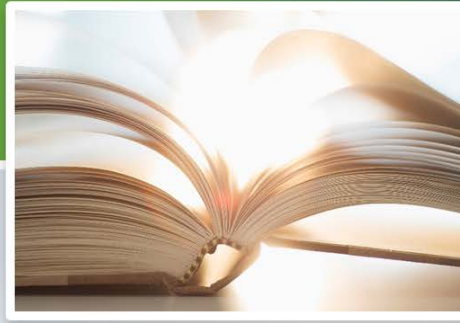
Your use is secondary to original purpose

Slide 4: Examples of Secondary Research

Examples of Secondary Research



US Census data,
American
Community Survey



CIA Fact Book,
country data



Bureau of Labor
Statistics,
occupational data

Slide 5: Examples of Secondary Research

Examples of Secondary Research

Pew Research surveys

Newspaper's archived
research data

Slide 6: Tips to Discern if Data is Credible

Tips to Discern if Data is Credible



Verify the original source

Check credibility of
the source and site

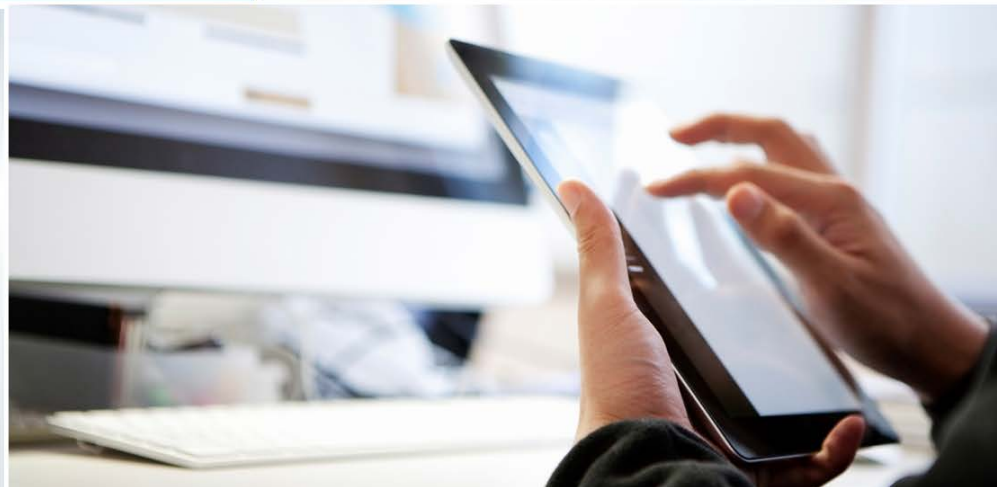
Slide 7: Tips to Discern if Data is Credible

Tips to Discern if Data is Credible

Look for convergence

Rarely use blog, unless you
go to original source

To do otherwise can be
very dangerous!



Slide 8: Discern Credibility of Data Searching Online

Discern Credibility of Data Searching Online

Be alert to
interpretations

Seek original report

Weigh credibility of
source company



Slide 9: Validate Data Sources

Validate Data Sources



Be alert to
biased motivations

Question the
source's objectivity

Many sources agreeing
lends some weight

Slide 10: Many Relying on Same Source

Many Relying On Same Source



More the dots connect,
more likely it's credible

“Everybody” citing
same source

Slide 11: Still Validate the Source

Still Validate the Source

HR firm had done only
eight interviews!

Media snowball based
on inadequate data



Slide 12: Test Validity of Conclusions

Test Validity of Conclusions



Track back to
original source



Know how much
risk client can
afford



More arrows
aligned, take a little
more risk

Slide 13: Advance Your Thinking

Advance Your Thinking

Step beyond secondary
and internal research

Formulate next steps

Identify knowledge gaps
and blind spots



Slide 14: Questions Client's Assumptions

Question Client's Assumptions



Even if hired to do a particular kind of research

Advise them on what is actually needed

It saves time, effort and money

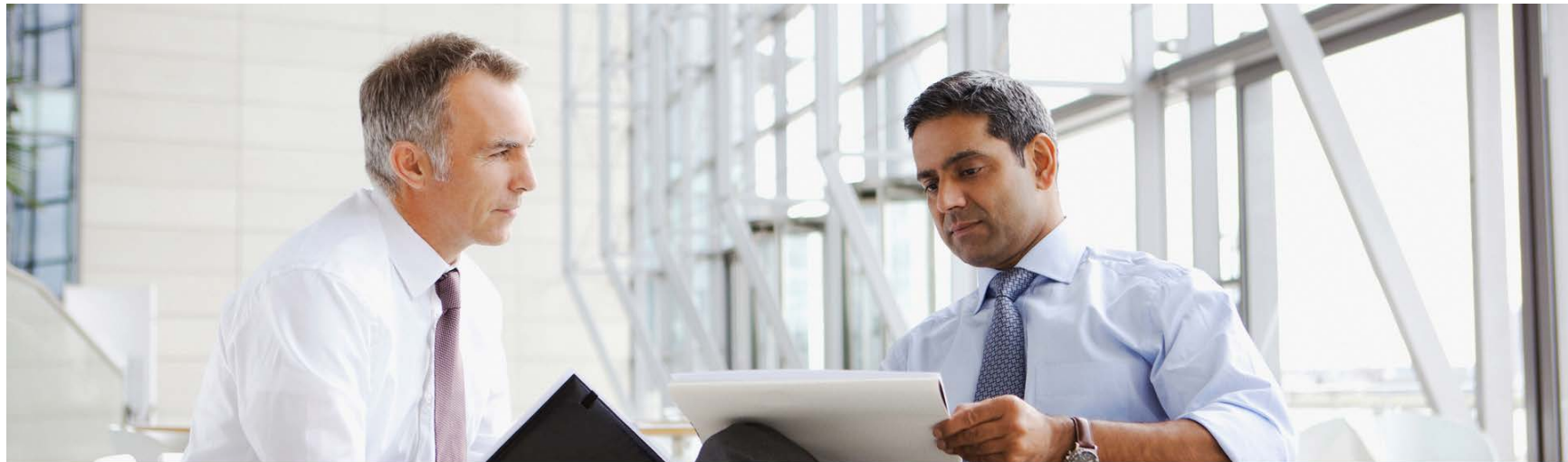
Slide 15: An Example of Questioning the Client's Assumptions

An Example of Questioning the Client's Assumptions



Contracted for specified task
Customer satisfaction survey of
volunteer leaders
Client provided internal research

Slide 16: Advise Client of What They Really Need



Advise Client of What They Really Need

It was not what the client assumed

Address information and issues revealed by internal research

Slide 17: Read the Signs

Read the Signs



Identify the real problems

Advise research that addresses
the real problems

Slide 18: Give Directions During the Planning Stage

Give Directions During the Planning Stage

Review internal research

Make recommendation based on the data

This shows value of internal and secondary research