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### RESEARCH ARTICLE

#### CHALLENGES IN CONDUCTING COMMERCIAL RESEARCH AND THEIR SOLUTIONS: AN EXAMINATION OF THE RESEARCH PROCESS

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#### Abstract

Most literature on research methodology implicitly assumes that research is conducted by a single individual, with limited attention paid to the realities of collaborative, large scale research. Even when methodological application is discussed, it is often treated in an abstract manner, insufficiently grounded in the complex conditions encountered at the field level. This gap becomes especially pronounced in a country like India, which is vast geographically and heterogeneous linguistically, culturally, and socially, with 22 official languages and significant variations in religion, customs, and socio-economic contexts. Conducting pan-national studies in such an environment presents challenges that cannot be fully anticipated without direct field engagement, including issues of coordination, standardisation, interpretation, and local adaptation. These ground-level complexities contribute to a persistent disconnect between academic research and commercial managerial research. Academic studies tend to prioritise methodological rigour, theoretical consistency, and controlled research designs, while commercial research emphasises scalability, speed, and operational feasibility. However, neither domain sufficiently documents the practical challenges involved in implementing research methodologies across diverse and decentralised settings. As a result, there exists a notable gap in meta-literature that critically examines the process of research execution itself. This paper seeks to address one such underexplored dimension that is particularly relevant to commercial research - the use of research teams. Unlike individual academic inquiry, commercial research frequently relies on multi-layered teams operating across regions. The paper examines the implications of team-based research, the inherent difficulties it introduces, and the practical solutions adopted in real-world settings, thereby contributing to a more grounded and practice-based understanding of research methodology.

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**Introduction:-**

Managerial research flourishes across academic journals and commercial consulting. Such research proliferates due to its direct relevance to business strategy, decision-making, and organisational performance. Yet, literature scrutinising its own implementation remains sparse. While academic studies often prioritise outcomes like strategy effectiveness or leadership impacts, commercial efforts focus on client-specific solutions, generating vast outputs without deep self-reflection on methods (Aguinis et al, 2022). But few works examine standard operating procedures in commercial research, how it varies from academic research and how proper rollout and implementation are ensured.

**Problem Definition:-**

Commercial research typically involves collaborative teams rather than solitary individuals, with established literature outlining specialised processes and roles (Malhotra & Birks, 2017). Research executives or managers commonly oversee proposal drafting, questionnaire design, and final report preparation. Specialised analysts perform data processing according to executive directives. Field executives/managers handle primary data collection via face-to-face quantitative interviews as well as qualitative in-depth interviews or focus group discussions across regions. Ultimately, it is the client who understands the findings and interpretations and uses them to make strategic decisions.

This multi-actor, multi-stage framework introduces complexities like stakeholder coordination and quality assurance, which contrast with many academic projects led by individual researchers or small, aligned teams (Saunders et al., 2019; Easterby-Smith et al., 2018). The involvement of diverse stakeholders with varying objectives, competencies, and degrees of proximity to the data necessitates the adoption of standardised systems, clearly defined roles, and robust operating procedures (Cooper & Schindler, 2021). Methodological rigour alone is insufficient unless it is complemented by effective coordination, quality control, and communication mechanisms.

Consequently, commercial research necessitates a distinct set of standard operating procedures (SOPs) tailored to its team-based, multi-actor dynamics, starkly diverging from the individualised or small-team workflows typical of traditional academic research. Amid the persistent academic-commercial disconnect and scarce meta-literature on research workflows, studying SOP development, implementation, and oversight identifies optimal practices, boosts methodological rigour, and maximises actionable insights for business applications.

**Objective of the Study:-**

This paper aims to examine the systems and procedures unique to commercial research, with a focus on their design, implementation, and management to ensure reliability, consistency, and practical relevance in team-based environments.

**Methodology of the Study:-**

This study is actually a review of practices in commercial research. It draws on information collected through secondary research from credible sources, as well as the thirty-plus years of experience of the authors in the research field, one in Social and the other in Market Research. Further, experts from the industry were consulted on areas of uncertainty.

**Findings of the Study:-**

Based on the above objective, the findings of the review are presented as a chronological flow of the list of activities that specifically focus on the team-based protocols.

**Information Needs:-**

The process starts with the buyer of the research, commonly called the client. In commercial research, at the client's end, the person coordinating research within the organisation and the decision-maker or the person in need of the data are often distinct individuals, necessitating a structured briefing procedure to align expectations. The decision-maker - typically a manager facing a critical business challenge - provides the research executive with comprehensive details on the project background, the specific managerial problem, and the precise information required to inform a well-considered decision, along with a firm timeline for deliverables.

**Request for Proposal (RFP):-**

Once the Research Executive within the organisation gets this information, he prepares a document to brief the Research Agency or Data Provider, who is external to the organisation. This extensive document that the research executive creates is called the Request for Proposal (RFP). The RFP is a comprehensive document capturing the managerial problem, required data for analysis and recommendations, and contextual details - especially vital when the researcher is an external consultant unfamiliar with the organisation. It includes the organisation's current status and background, a precise problem definition, derived research questions, and study objectives, alongside specifications for the target population, geographic scope, and deliverables. The Terms of Reference (ToR) are explicitly outlined, encompassing timelines, budget constraints, ethical guidelines, and success criteria, ensuring alignment and feasibility before proceeding to methodology design and team mobilisation. Along with the RFP the client may give a face-to-face or online briefing to the research agency to clarify any doubts. They may also provide windows of opportunity for any further clarifications through the same method. Alternatively, the agency can call up or message the point of contact in the organisation in case there is only one agency in consideration.

**Research Proposal:-**

The next stage involves preparing a detailed research proposal based on the RFP. This document specifies data sources, precise sample size and sampling methods (e.g., stratified quota sampling across urban-rural divides), data collection tools like CAPI via KoboCollect, and analysis techniques such as regression modelling, outlining exact implementation steps rather than vague terms. It incorporates a Gantt chart detailing timelines for each phase, deliverables, quality checks (e.g., 10-20% back-verification), field training protocols, and a comprehensive cost breakdown. Beyond the technical methodology, it includes researchers' CVs, terms and conditions, ethical compliances, and payment schedules. Besides submitting the document file, there may be presentations to the client and discussions and iterations before the proposal is finalised. Many a time, there are multi-agency pitches, and it is based on the proposal and its presentation that the company decides on whom to give the work to. Some of these proposals may take the form of open or closed tenders, especially in the case of government or quasi-government clients. In commercial research, cost typically emerges as the decisive criterion for choosing a research agency, given tight budgets and the need to maximise ROI. As an agency person, the trick is to keep the cost down without compromising on the research quality.

**Signing of the agreement:-**

Once the proposal is shortlisted, the agreement is signed. Before it is signed, there may be discussions and iterations on the terms and conditions until the client is satisfied with all parameters. Especially the financials. Once the agreement is signed, it is not possible to change the terms without incurring huge penalties. All the timelines are usually based on the signing of the agreement, and hence, it is an important milestone in the research process.

**Clearances:-**

Upon contract signing, operations accelerate rapidly: the detailed research methodology is refined and finalised, research instruments (e.g., questionnaires) are prepared, tested, and client-approved, with necessary translations completed for multilingual contexts. A pilot study follows to validate instrument quality, methodology accuracy, and response patterns, incorporating client feedback to pre-empt issues. Throughout these stages, the agency maintains close collaboration with the client via milestone reviews, ensuring alignment between research outputs and decision-making needs while mitigating any potential dissonance. The questionnaire must be comprehensive, incorporating a scripted introduction for investigators to use when approaching respondents, explicit skipping patterns, and clear termination points to ensure uniformity. Pre-coding responses facilitates seamless data entry and analysis, while a structured format proves ideal for expansive, multi-location studies, minimising variability and enhancing reliability across diverse field teams.

**Operations brief:-**

Field teams in commercial research require a detailed written brief to ensure standardised execution, particularly across distributed locations like India's diverse states. This document outlines precise study protocols, preventing variations in questionnaire administration that could skew responses and compromise results. The operations brief gives clear goals, target demographics and geographic quotas. It also includes questionnaire administration guidelines like exact wording, sequencing and skip patterns, probing techniques and recording formats. It provides sampling instructions, such as eligibility screening and handling rejections. Timelines, ethical protocols, quality checks and reporting protocols are clearly enunciated.

**Inception Report:-**

An inception report in commercial research serves as an early roadmap document prepared by the research team shortly after project initiation, typically following an initial review of terms of reference (ToR), background documents, and stakeholder consultations. It refines the study's objectives, confirms alignment with client expectations, and outlines the detailed research design before full data collection begins. Prepared within the first couple of weeks after signing the agreement, it prevents deviations in scope and ensures feasibility in complex studies. The format for the operations brief and inception report may vary from agency to agency. And sometimes they may be clubbed together, especially in the case of less complex studies, both are invaluable in ensuring the quality of field work. Although both may seem similar, an inception report and operations brief in commercial research serve distinct purposes, with the former focusing on strategic planning and the latter on tactical execution.

**Field Training:-**

Training bridges the operations brief to field execution, as research quality hinges on investigators' performance. Clear instructions must pair with hands-on practice to ensure consistent data gathering, including role-playing sessions that simulate cultural sensitivities—such as regional taboos in India—and mock interviews to calibrate phrasing, sequencing, and probing techniques. CAPI proficiency training for tools like KoBoCollect is essential, featuring video demonstrations and quizzes on brief protocols, especially for staff new to digital methods. Performance metrics emphasise KPIs like completion rates and response quality scores, with zero tolerance for deviations and certification thresholds. WhatsApp groups provide real-time clarifications and coverage monitoring, supplemented by mid-field refresher webinars.

**Field Management:-**

In academic research, often conducted by a single individual, the researcher personally handles data collection and ensures quality control. In contrast, commercial studies involving numerous investigators demand rigorous field supervision to maintain standards. Supervisors train investigators through explanations and role-plays. They do performance monitoring, enforce deadlines and conduct random back-checks by calling 10-20% of each investigator's respondents to verify survey authenticity via key questions. They adapt questionnaires to local dialects, review filled forms for legibility and completeness—especially open-ended responses—clean data by cross-verifying missing answers with investigators or respondents and require extra interviews for substandard questionnaires. Supervisors also plan interview schedules and investigator travel, balancing high data quality with timely project completion.

**Quality checks:-**

To ensure the comprehensiveness of the data collected the agency works closely with the client, especially in finalising the questionnaire. Pilot studies are done and the reliability and validity of the questionnaire is ensured using statistical methods. Furthermore, supervisors perform the essential back checks previously specified, verifying accuracy and compliance throughout the research process. All filled questionnaires are cleaned and any substandard questionnaires are removed. Data cleaning via range and consistency checks is vital in commercial research, safeguarding data accuracy by flagging outliers (e.g., negative ages) and inconsistencies (e.g., "Male" vs. "M"), thus preventing distorted insights and ensuring reliable business decisions. These checks standardise datasets, enabling precise trend analysis and confident decision-making (Racickas, 2024).

**Analysis brief:-**

The researcher develops the research plan and instruments, after which the field team executes data collection. Collected data is then forwarded to the analytics team for entry, in case of PAPI (Pen and Paper Interviews) and processing. The researcher's role involves specifying to the analytics team the required insights from the data and, upon receiving the analysis, interpreting the results and formulating recommendations. To ensure alignment, the research team briefs the analysis team via a detailed written document outlining specific statistical tests, output formats, table structures, and chart types needed.

**Cost calculations:-**

Commercial research is funded by businesses, private companies, or venture capital. The research is generally focused on market-driven needs and is designed to yield profitable products or services. Commercial research looks at cost benefit when they decide on the budget. Research project costing is calculated by multiplying personnel man-days by their applicable wage/salary rates, supplemented by direct expenses including travel, lodging, training and any project-contingent outlays for comprehensive budgeting. It is then marked up with a profit percentage. It is

essential that the researcher doesn't quote too low so that the company ends up making a loss or too high that it loses and doesn't get the account.

#### **Setting timelines:-**

Commercial research tends to be short-term and product-focused, driven by urgent market demands or product launch timelines (Eldridge S, 2025). This creates intense pressure to deliver actionable results swiftly, with tight schedules that must be met to align with business cycles, competitive pressures, or seasonal opportunities. Hence, detailed timelines are a must and one of the methods followed is creating a Gantt chart showing each activity and timelines and following it implicitly. Such a chart will also help you know the things that can be done simultaneously so that the study can be expedited.

#### **Report/presentation:-**

In commercial research, post-analysis delivery begins with a client presentation featuring topline findings, key relevant insights with interpretations, and actionable researcher recommendations to facilitate swift decision-making. Hard copy reports are produced as per client specifications—often detailed upfront in RFPs for government projects—while soft copies are standard. Since the data is the property of the client, it is provided to them in a drive or in a downloadable form in the cloud. The draft report may trigger iterative feedback loops, where clients may request additional analyses, alternative interpretations, content additions or deletions, or refinements, ensuring final alignment before approval and closure.

#### **Confidentiality:-**

Unlike academic research's public dissemination via journals and conferences, commercial research enforces rigorous confidentiality for client data and insights, restricting access to authorised personnel only. This secrecy protects competitive advantages, such as proprietary market insights or strategic vulnerabilities, preventing leaks that could benefit rivals; it is enforced through non-disclosure agreements (NDAs), secure data handling protocols (e.g., encrypted servers, access logs), and legal penalties for breaches, ensuring trust and repeat business in high-stakes commercial environments. Commercial research frequently faces challenges such as missing sampling frames or unknown population parameters, making true random sampling infeasible and requiring practical alternatives. This is compounded by time and resource constraints. In such cases where qualitative insights are more important than broad inferences or extrapolation of the results, non-probability methods like quota, convenience or purposive sampling are employed, which prove acceptable for a number of descriptive or exploratory social science projects (Chakraborty C, 2024). Alternatives include systematic sampling via shop intercept techniques - approaching every nth customer - or the right-hand rule method, starting at a random point and systematically interviewing households on one side while following directional skipping patterns to approximate randomness and ensure coverage.

#### **Conclusion:-**

This review of practices highlights the unique challenges faced by researchers doing commercial studies, which are large-scale in nature and the solutions they have found thereon. This study is of great relevance to academics and corporate alike. The review highlights the different steps that have to be undergone while doing commercial research, many of which are not explained in textbooks. It is a simple chronological flow of the processes of conducting a commercial study and would be extremely useful to students entering the commercial research field. For the corporate it gives a guideline on what all has to be covered and considered in a commercial research.

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