

"A tremendous resource. ... covers an area of business research that simply hasn't been addressed before."

—Mary Ellen Bates, from the Foreword

RESEARCH on MAIN STREET

Using the
Web to Find
Local Business
and Market
Information

MARCY
PHELPS





PLANNING THE TRIP: HOW TO APPROACH LOCAL BUSINESS RESEARCH

Before going local—before you use the web to find business and market information—you have to prepare for the ride. Finding the kind of authoritative local information you need when you’re making important decisions can be time-consuming, and it’s not always cheap.

Local business information is very specialized, and it’s costly to create. You’ll find fewer online resources covering small geographic areas than those containing global, national, or even state-level information. Those that do provide detailed, local-level information will often charge a fee. Governments, associations, and other organizations within smaller geographic locations sometimes don’t have the staff or budget needed to compile or maintain sources.

You’ll make the best use of your local research time and dollars if you have a strategy—one that will direct you to the best sources and help you quickly drill to the local level. As with any good plan, your strategy for finding local business sources and information

should include some flexibility, creativity, and a selection of alternative routes, just in case you don't come across exactly what you need. When you're researching a local area or using local sources for more in-depth coverage of a topic, where do you start?

Take a Geography Lesson

It sounds basic, but before you get started, make sure you learn a little about your targeted location. Are you researching Lakewood, Colorado, or Lakewood, California? In which county or metropolitan area is this neighborhood found? When working on a geography-based project, I like to run a search in Google Maps (maps.google.com) to view the boundaries and nearby places. A county or city website could also be a good starting point for learning about a location and might quickly lead you to some key resources.

In addition to learning about locations, your search for local information will be easier if you become familiar with some basic geographic concepts, including terminology and the various ways geographic areas can be broken down. Chapter 4, Local Demographics, covers some definitions and a brief discussion of geography types. *Demographics: A Guide to Methods and Data Sources for Media, Business, and Government*, by Steve Murdock, Chris Kelley, Jeffrey Jordan, Beverly Pecotte, and Alvin Luedke (Paradigm Publishers, 2006), includes a nice description of common ways that geography can be delineated.

Small Locations Don't Live in Isolation

More often than not, local business and market research shouldn't be limited to a particular geographic location. What happens in one location influences, and is influenced by, what's going on elsewhere.

Local economies, for example, are often directly affected by state and national economic conditions. That's why it's a good idea to look at information about a geographic area in the following contexts:

- How it relates to *larger* geographic areas: Find out if the information about a location is consistent with what's happening on a national or state level. For example, many sources for local statistics include tables with comparisons to larger areas.
- How it relates to *nearby* geographic areas: Consider how information about one place compares with what is known about other cities, towns, or neighborhoods in the region. Can you find and easily compare, for example, the demographics of the cities and towns in a particular county?
- How it relates to *similar* geographic areas in other regions: Compare the findings for one location with others that are similar in size, demographics, climate, or other factors. As an example, you might want to see how one city's job-growth numbers look when compared with those of similar-sized cities in other parts of the country.

Take Time for a Reality Check

As I've said earlier in this chapter and in this book's introduction, when it comes to local business and market information, you're not always going to find exactly what you want. With all research, it's essential to manage your expectations from the very beginning, and this step is perhaps even more important when searching for local information.

Start by listing and evaluating your key questions:

- Prioritize the list so you can determine what information is essential and what's just "nice to know." More information is not necessarily better, and having too much will get in the way of what's really important.
- Check to see that the questions on your list aren't too specific. It's often easier to keep your questions more general and not impose too many limits on your search. For example, instead of searching for several specific economic indicators, try pulling in any of the indicators that you find that could help you piece together a picture of your location.
- Stop at regular intervals throughout the research process to review your priorities and revise your tactics. You might discover that in light of what you've found, a different approach might be more fruitful. You might also decide that the time is right to end your search.



Managing Your Clients' Expectations

Cynthia Shamel, Shamel Information Services

Managing expectations is an important part of managing clients and projects. Clear, open, and ongoing communication will lead to a mutual understanding about the scope, the deliverable, the costs, and the timeline. Whenever possible, negotiate all these parameters before you begin work. They

are interdependent, and one will affect the other. Monitor the variables as you go along. Should anything change, notify your client immediately and renegotiate. It doesn't matter what triggers the change; it could be the client expanding the scope, the costs running higher than anticipated, or more time being required to analyze results. Whatever triggers the change, it is your responsibility to keep the four variables of scope, deliverable, costs, and timeline in balance. Be prepared to give and take, and then communicate the options to your client.

For example, a client recently asked for a complex research project with a short time frame and a specific format for delivering results. We agreed on a project strategy, and the client approved the anticipated costs. As work progressed, the client requested changes to the final report that significantly increased the time required to complete the project. We discussed alternatives. The scope, the due date, and the desired deliverable were nonnegotiable. The only variable to adjust was cost. Only by increasing the project budget could we meet the client's changed expectations. When we explained this to her, she agreed to the increase. Client expectations had been managed clearly and openly so that everyone was satisfied.

Effective client relations rely on trust. It is your responsibility to facilitate the communication necessary to develop a mutual understanding that will lead to an on-time, on-budget, on-target project outcome. Exceed expectations, and you can build the trust you need to encourage repeat business and to generate referrals.

Be Flexible

When it comes to local business research, you need to consider that the information you're looking for may never have been gathered or

posted on a website. Even if it exists, what if it becomes too costly for you to find? You will have better results if you're flexible about the questions you're asking.

With local research, it's especially important to consider what's "good enough" for your project or what else would answer your ultimate questions. The following are the kinds of questions you could be asking yourself or your clients in order to add some flexibility to your local research projects:

- If data from the decennial census is not fresh enough, will the latest estimates from the American Community Survey suffice?
- Could 3-year estimates make a good substitute if projections turn out to be too costly?
- Would county-level data be good enough if city-level data isn't available?

Taking the time to answer these types of questions before you even start your search actually saves time in the long run. By not limiting yourself to just a specific set of hard-to-find data, you'll expand your options and possibly uncover something else that might be useful. Finally, you'll avoid spending time and money retrieving information that your client doesn't want.

Throw In a Little Creativity

When it comes to local business and market information, sometimes what you need won't be found in the most logical place. It often takes some creativity to gather the best information in the shortest amount of time. Here are some ways you can be more creative in your local searching:

- Think broadly about geography rather than focusing on a particular location. State websites, for example,

often contain city-level data that's more detailed than what is found on a city's own website.

- As Mary Ellen Bates often says in her workshops and writings, it helps to “look sideways.” Avoid staying too focused on just a precise set of sources or questions. While you're looking for and using local sources, keep an open mind and always consider other possibilities.
- Try using sources in creative ways. As an example, ThomasNet (www.thomasnet.com) is a free database of manufacturers, distributors, and service providers. It's marketed as something that, according to its website, “helps industrial businesses grow” and bring buyers to their own websites. For local researchers, though, it's also a great resource for counting and identifying companies by industry and location.
- Know when to stop or revise your search. If you're not finding the answers to your questions, think about taking another course of action. Would putting any more time into your current approach really uncover those golden nuggets of information, or will you just find more of the same?

Use the Web to Find Sources Rather Than Just Answers

Even with the most sophisticated search tools, business-quality local information is often elusive. Perhaps there's not much demand, so no one takes the time to gather or share the information. Sometimes, there's so much demand that the only online information you can find is contained in a high-priced packaged report. And at other

times, it just isn't there. Yes, even in the age of Google and advanced information technology, not everything is online.

You'll increase the likelihood of eventually finding what you need if, rather than looking just for answers, you also look for sources that can lead you to your answers. While you're following the trail, stop to look around for a website, an organization, or a person that could be a source or could lead you to some likely sources. The following sections include tips for using the web to search for sources rather than just answers.

Look for Links and References to Sources

Lists of someone else's sources of the information they're providing, or links to their favorite websites, are those "bread crumbs" found along the research trail that can lead you to your answer. They'll sometimes take you from a so-so resource to one that's right on target. Whenever you're scanning an association website, look for lists of links to relevant online resources. Make note of the people writing articles in your topic area, and look at what resources they turn to for local information. This will increase both the quantity and the quality of sources you use for your own research.

Just remember that in a hyperlinked world, it's easy to become distracted. You don't want to spend too long on any one site, and you definitely don't want to wander aimlessly from site to site. It's always important to have a plan for your research, stay focused, and keep an eye on the time you're spending online.

Identify People You Can Ask

Look for the experts since they may know the answers to your questions. Experts will often share unpublished research or articles. They can add local knowledge to any topic, and they can confirm what you've found on the web. Many are flattered and are quite generous

when someone politely asks about their area of expertise. Here are some techniques for using the web to identify people to ask for help:

- Scan websites, databases, and other sources for people who have special knowledge of your topic or location. Find out who are considered the “local experts.” For example, who is writing in local publications or speaking to local groups about your topic?
- Ask yourself who cares about this topic enough to study it, gather information about it, or spend some time talking about it. Look for local journalists, university professors, librarians, and people affiliated with local governments and associations.
- Check company websites for local management and staff. Even if these people don’t have the answers you need, perhaps they are in a position to know who does.

Chapter 7, Looking for Locals, includes additional tips for using the web to identify local experts.

Prepare for the Interview

Once you’ve identified people to ask, use the web to prepare for your conversations with them. As any professional telephone researcher will tell you, the better you prepare for your initial call or email, the better your results. Unlike online research, if you make a mistake on your first interview, you don’t get another chance to ask your question. If the experts don’t have to explain the basics to you, they can spend more time going into specifics. These are some ways to prepare for conversations with the experts:

- Familiarize yourself with the vocabulary and the issues involved in their line of work. You will sound more informed, and you will be more likely to

quickly take in the information that the expert is trying to convey.

- List your questions ahead of time, and be clear about your intent. Do you need specific information to fill in a gap in your knowledge? Are you trying to resolve an issue of conflicting information, or are you merely trying to get an expert opinion?
- Make sure you've been thorough in your web searching so that you don't waste your time and that of your contact by asking for information that can be found easily through online sources.
- Pick up the phone rather than sending an email. It's unlikely that someone will take the time to write out an answer, particularly when the delete key is so much more convenient.

Chapter 7, *Looking for Locals*, goes into more depth about turning to the experts and preparing for your interviews, and it includes tips for getting people to talk.

Verify What You Find

It's always a good idea to take a cautious approach to using the web for business- and market-related information. When you're looking for information about a particular topic *and* a specific location, you've added yet another level of uncertainty on top of your usual skepticism. Pay special attention to the details of your sources and the information they contain to make sure that you're basing important business decisions on sound information. For example, you might

- Compare statistics from different sources and look for any inconsistencies.

- Confirm that you have the most up-to-date information available.
- Make sure to separate fact from opinion.

You can use other online materials to verify the information, but sometimes it's quicker and simpler to call someone and ask. It also helps if you maintain a list of authoritative sources—known for their high-quality information—that you can turn to when you need to do local-level research. Appendix A, Resource Roadmap, is a good starting point and includes all the resources mentioned in this book, organized by chapter.

Know When It's Time to Pay

Sometimes, even for expert researchers, what's needed can't be found in free resources. Information, in spite of what people often think, is not always free. It takes time and expense to collect data, organize it, add analysis, package and distribute it, and do whatever else needs to be done to make the information accurate and useful. Free information is often provided through sponsorships or donations. Other times, it might be part of an organization's mission, or it's required by law. Otherwise, costs need to be recovered.

If you limit yourself to only what's available for free, you might be missing out on valuable information that can't be found elsewhere. You also risk spending more time looking for a free source than you would have spent by going to one that's fee-based. Chapter 9, *Paying at the Pump*, discusses specific fee-based sources that won't break your budget and describes what local information they contain and when to consider using them.

More Strategic Tips for Finding Local Business and Market Information

- ⇒ Before getting started, ask yourself or your client what's needed and how it will be used. Do you really need "everything there is to know" about a location, or will a few demographics or economic indicators meet your needs?
- ⇒ Use a variety of sources, and become familiar with both free and fee-based resources before you need them. This knowledge will come in handy when you're suddenly faced with a project or if you're pressed for time.
- ⇒ Always have a Plan B, just in case you can't find the answers to your questions. Look for what else you could use in their place. For example, will information about the number of jobs in a particular region substitute for payroll amounts?
- ⇒ Stop at regular intervals and take stock of your progress. Based on the amount of time or money spent, what do you have to show for it? Should you continue your web search, take some time to contact a few experts, or just end your research?