



Arlington
Research

From Numbers to Narratives

A Practical Workbook for Research-Led
Thought Leadership



Foreword



Most thought leadership doesn't fail because of the story but because of the thinking that came before it.

We've seen organisations invest heavily in content, distribution and design, only to find the story doesn't quite land. Not because it isn't well told, but because the research underneath it wasn't given the time, clarity or investment it needed.

Great research-led thought leadership starts much earlier than you would expect. It starts with the decisions you make about audience, methodology, and what you're really trying to say.

This workbook is built from what we have seen in successful research-led campaigns, where insight travels further because it's grounded in something credible, considered, and genuinely useful.

It isn't a rulebook. It's a way to think more clearly.

Use it to challenge your assumptions, shape better conversations, and make more confident decisions before your research goes public.

Rachel, Head of Research, Arlington Research

How to use this workbook

↘ Start with where you are



Planning research

Section 1: Foundations

Clarify purpose, audience, and direction



Designing Research

Section 2: Designing Research That Works

Get sample, methodology, and credibility right



Working with findings

Section 3: Turning Insights into Story

Move from data to narrative and headlines



Finalising output

Section 4: Action Plan

Align outputs and next steps



What you'll find inside

Thinking tools

Prompts and frameworks to guide decisions

Our perspective

Practical guidance on what works, and what to watch for

How to use it

- Dip in at the stage you need
 - Use it to guide discussions and decisions
 - Revisit sections as your project evolves
-

The goal

You don't need to complete everything, but to make better decisions at the moments that matter.

The research journey at a glance

↘ Use this as a guide to find where you are – and where to go next.

1

Set the foundation

Start here if you're shaping the direction of your research

- From Data to Authority
- Don't Rush the Research

2

Design it properly

Pressure-test how your research will stand up

- Getting the Sample Right
- Credibility Counts
- What Does Good Thought Leadership Research Really Cost?

3

Turn insight into story

Move from data to narrative, headlines, and hooks

- When PR Meets Research
- From Stat to Story
- From Findings to Headlines
- The Art of the Hook
- Global Voices, Local Stories

4

Bring it together

Align outputs and plan what happens next

- Your From Numbers to Narratives Action Plan

Tools & templates

- Planning Checklist
- Global to Local Mapping Tool



Section 1

Foundations of Research-led Thought Leadership



Chapter 1:

From Data to Authority



Purpose



Thought leadership earns attention, but it earns trust more slowly.

In crowded markets, opinions are easy to share. Authority is harder to establish, but easier to lose. Research plays a critical role in bridging that gap – not by proving a point, but by grounding ideas in evidence that audiences recognise as credible.

When research is used thoughtfully, it allows organisations to move beyond commentary and contribute meaningfully to the conversations they want to shape. When it isn't, even the strongest point of view can feel unsubstantiated.

From Data to Authority: Exercises

The Influence Intent Tool

What are we trying to influence?

- A market conversation
- Customer understanding
- Stakeholder perception
- Policy or industry direction
- Leadership reputation
- Buyer behaviour
- Media agenda

What's the **primary purpose**?

What **evidence** do we need to support this?



Are We Ready to Start?

Checklist

- We know why we want to create thought leadership
- We understand the audience we want to influence
- We have a clear point of view
- We have identified a meaningful gap in the conversation
- Research is the right tool (not opinion-only content)

Reflection Questions

1. Why does our organisation need thought leadership right now?
2. What do we want to be known for, and why?
3. What existing evidence do we already have?
4. What questions do we need our research to answer?





Chapter 2:

Don't Rush the Research

Timings



- The pressure to move quickly is rarely felt at the end of a project, it's at the beginning.
- Research timelines are often compressed to make room for content production, design, and launch activity. But the decisions made early on on focus, framing, and question design determine what the research can realistically deliver later.
- Slowing down at this stage isn't about delaying outcomes. It's about creating the space needed for better ones.

Don't Rush the Research: Exercises

Timeline Rebalance Planner

- **Typical timeline:**
 - Survey design = 10%
 - Fieldwork = 20%
 - Content production = 70%
- **Ideal timeline:**
 - Survey design = 40%
 - Fieldwork = 20%
 - Content production = 40%
- **Where do we need more time?**

Checklist: Avoiding the Rush

- Survey questions are aligned to a clear purpose
- Enough time has been allocated for multiple drafts
- PR and content teams have contributed to the direction
- We have pressure-tested whether the survey can create strong angles
- We understand any ideal headlines or storylines being explored, and have pressure-tested their feasibility



Reflection Questions

1. When have we rushed research before? What happened?
2. What normally delays survey design?
3. What do we need to protect more time for?
4. Have we allowed sufficient time between data review and reporting?

See Planning Checklist to support early-stage decision-making.





Section 2

Designing Research That Works





Chapter 3:

Getting the Sample Right

Sample



- Who you listen to shapes what you learn.
- Research-led thought leadership sometimes fails not because the questions were wrong, but because these questions were answered by the wrong people. Sample design is one of the most influential, and most underestimated, decisions in the entire process.
- Clarity on who the content is for helps clarify who the research should hear from. Without that alignment, insight quickly loses relevance.

Thought Leadership Goal	Audience	Sample
Show “we understand you”	Decision makers	Same audience
Show “here’s what your market thinks”	Decision makers	Their customers, employees, voters, users

Which applies to this project?



Getting the Sample Right: Exercises

The Clarity Test

Complete these sentences:

This thought leadership is for...

We want them to understand that...

To support this, we need insight from...

Checklist

- We know exactly who the content is aimed at
- We are not trying to serve two audiences with one survey
- The sample supports the storylines being explored without constraining what the research can reveal
- Sample size and seniority match the ambition
- The audience is feasible to reach

Reflection Questions

1. Who would not be able to answer questions credibly, and why?



Chapter 4: Credibility Counts



Methodology



- Credibility is rarely questioned until it's missing, and in thought leadership, it's tested quickly.
- In thought leadership, methodology becomes visible the moment a story is challenged. Journalists, stakeholders, and informed audiences increasingly want to know not just what the data says, but how it was generated.
- Robust methodology doesn't guarantee attention, but weak methodology almost always undermines it.

The Credibility Scorecard

This scorecard is designed to help you assess whether your research would stand up to external scrutiny if used for research-led thought leadership.

It is not about perfection. It's about identifying where credibility may be fragile, and where a pause or adjustment would strengthen the work before it's published.

How to use the scorecard

- Rate each area from 1 (weak) to 5 (robust)
- Use the same scale across all criteria
- If an area scores 1–3, note what would strengthen credibility before external use

Rating anchors

1. **Weak:** Significant credibility risk; unlikely to stand up to scrutiny
2. **Fragile:** Some foundations in place, but clear gaps remain
3. **Adequate:** Defensible, but limited confidence or clarity
4. **Strong:** Well considered and clearly defensible
5. **Robust:** Best-practice standard; transparent and media-ready

	Descriptor	1 Weak	2 Fragile	3 Adequate	4 Strong	5 Robust	Notes / Actions (if scored 1–3)
Sample quality	How well the sample reflects the audience the research aims to understand or influence						
Sample size	Whether the number of responses supports the claims being made						
Audience relevance	The extent to which respondents have direct experience of the topic						
Geographic distribution	How intentionally and transparently markets are represented						
Question neutrality	Whether questions are balanced and free from leading language						
Methodological clarity	How clearly the approach could be explained to an external audience						
Data quality & cleaning	The rigour of data checks and handling						
Comparability	Whether results can be fairly compared across groups or markets						
Transparency	Willingness and ability to share methodological detail publicly						
Total score						/ 45	

If the total score is driven down by one or two areas, focus there first. If several areas score 3 or below, consider pausing before external use.



The Credibility Scorecard

Interpreting the total score

- **36–45:** Strong credibility foundation; suitable for external thought leadership
- **27–35:** Generally sound; review lower-scoring areas before publication
- **Below 27:** Credibility risks present; address before using publicly

Before you move on

- A high score doesn't guarantee influence. A lower score doesn't mean the research has failed.
- What matters is identifying where credibility could be challenged and deciding whether to strengthen the work or adjust how it is used.

Use the total score as a sense-check, not a pass/fail test.

Credibility Counts: Exercises

Checklist: Defensible Data

Methodology becomes visible when a story is questioned.

- We are comfortable sharing the methodology publicly
- Sample sources are high quality
- No leading or biased questions
- Clear demographic quotas
- Data has been validated



Chapter 5:

Cost, Value, and Priorities

Investment



- Research budgets are often discussed in terms of cost. They're better understood in terms of value.
- The most effective research-led thought leadership isn't defined by scale or speed, but by whether it enables clarity, confidence, and credibility. Decisions about where to invest - and where not to - shape the usefulness of everything that follows.

Value-based Prioritisation

Essential Value (Must-haves):

- Good sample
- Solid methodology
- Expert question design
- Narrative review

Added Value (Strengthens story):

- Additional markets
- Oversamples
- Qualitative depth
- Additional segmentation

Wasted Value (Cut these first):

- Oversized samples
- Markets that don't matter
- Vanity metrics
- Redundant questions

List yours:

List yours:

List yours:



Cost, Value, and Priorities: Exercises

Reflection Questions

1. What do we need this research to enable?
2. What's the cost of getting this wrong?
3. Are we investing in insight or just data?





Section 3

↳ **Turning
Insights into
Story**





Chapter 6:

When PR Meets Research

Collaboration



- Thought leadership sits at the intersection of research and storytelling.
- When these disciplines are brought together late, opportunities are often missed. When they align early, research is more likely to explore questions that matter externally, not just internally.
- Collaboration here isn't about control - it's about shared intent.

Early alignment works best when potential storylines are agreed with the client before questionnaire development. Research teams can review these ideas, advise on feasibility and audience fit, and highlight risks - but should not be responsible for deciding the narrative.





When PR Meets Research: Exercises

The PR–Research Conversation Prompts

What story do we want to tell?

What headlines would we LOVE to land?

What tension exists in the market?

What hasn't been asked before?

Checklist: Aligned for Success

- Shared purpose
- Shared hypotheses
- Shared understanding of media needs
- Shared angle priorities
- Agreement on what “good” looks like



Chapter 7: From Stat to Story



Reporting



- A research report can contain extensive data and still struggle to create impact.
- What makes the difference is interpretation. Valuable reporting doesn't simply describe what was found; it helps people understand why it matters and how findings connect.
- This is where research either becomes usable or remains dormant.

Insight Hierarchy

- The following exercise helps distinguish between information and insight to identify where thinking may be stalling.
- Research rarely fails because there isn't enough data. More often, it fails because teams struggle to move through the hierarchy: from what was collected, to what it means, to what should happen next.

How to use the Insight Hierarchy

- Mark the level you've reached
- Identify the level you're struggling to move beyond
- Focus effort there; not on collecting more data

*If you can't move up the hierarchy, more information rarely helps.
Clearer interpretation usually does.*



Where are you stuck?

Pause and reflect:

- Are we still describing findings without interpreting them?
- Do we have insights, but no clear themes?
- Do we understand the story, but struggle to articulate actions?

Being “stuck” is not a failure, it’s a signal that often indicates the need to:

- slow down interpretation
- revisit the audience perspective
- step back from individual stats
- allow space between analysis and storytelling

Consider: What would help us move to the next level: more evidence or more thinking?





Insight Hierarchy

Use this to identify where your thinking currently sits, and what's needed to move it forward.

Actions	What should happen next?	Clear, practical implications grounded in the research. Actions explain <i>what to do</i> and <i>why it matters</i> . <i>If we act on this, what changes?</i>	<i>If this feels hard, the story may not be clear yet</i>
Story	What does this mean for our audience?	A coherent narrative that connects themes into a point of view. The story gives the research direction and relevance. <i>What are we really saying here?</i>	<i>If this feels vague, the themes may be too broad</i>
Themes	What matters most?	Patterns that emerge across multiple insights. Themes help prioritise and focus attention. <i>Which ideas keep repeating – and why?</i>	<i>If everything feels equally important, step back</i>
Insights	Why do these findings matter?	Interpretation that connects findings to meaning, context, or implication. Insights move beyond description. <i>So what? What does this tell us?</i>	<i>If you're listing stats, you're not here yet</i>
Findings	What does the data show?	Summarised observations and results. Findings describe what happened, but not why. <i>What are we seeing?</i>	<i>If this feels overwhelming, prioritise</i>
Data	What was collected?	Raw responses, metrics, verbatims, and outputs. At this level, nothing has been interpreted. <i>What information do we have?</i>	



From Stat to Story: Exercises

Checklist: Insight-Led Reporting

- Interpretation, not description
- Visuals add clarity
- Themes are prioritised
- Recommendations are clear
- Story flows logically

With insight clarified, the next challenge is deciding which of those insights can travel, and how they become narratives others want to engage with.





Chapter 8:

From Findings to Headlines



- Strong narratives aren't built from isolated statistics.
- They emerge from patterns, tensions, and shifts that appear across the data. Recognising those signals requires both analysis and restraint - knowing what to emphasise, and what to leave aside.

Story Arc Worksheet

Context

Insight

Tension

Implication

Action



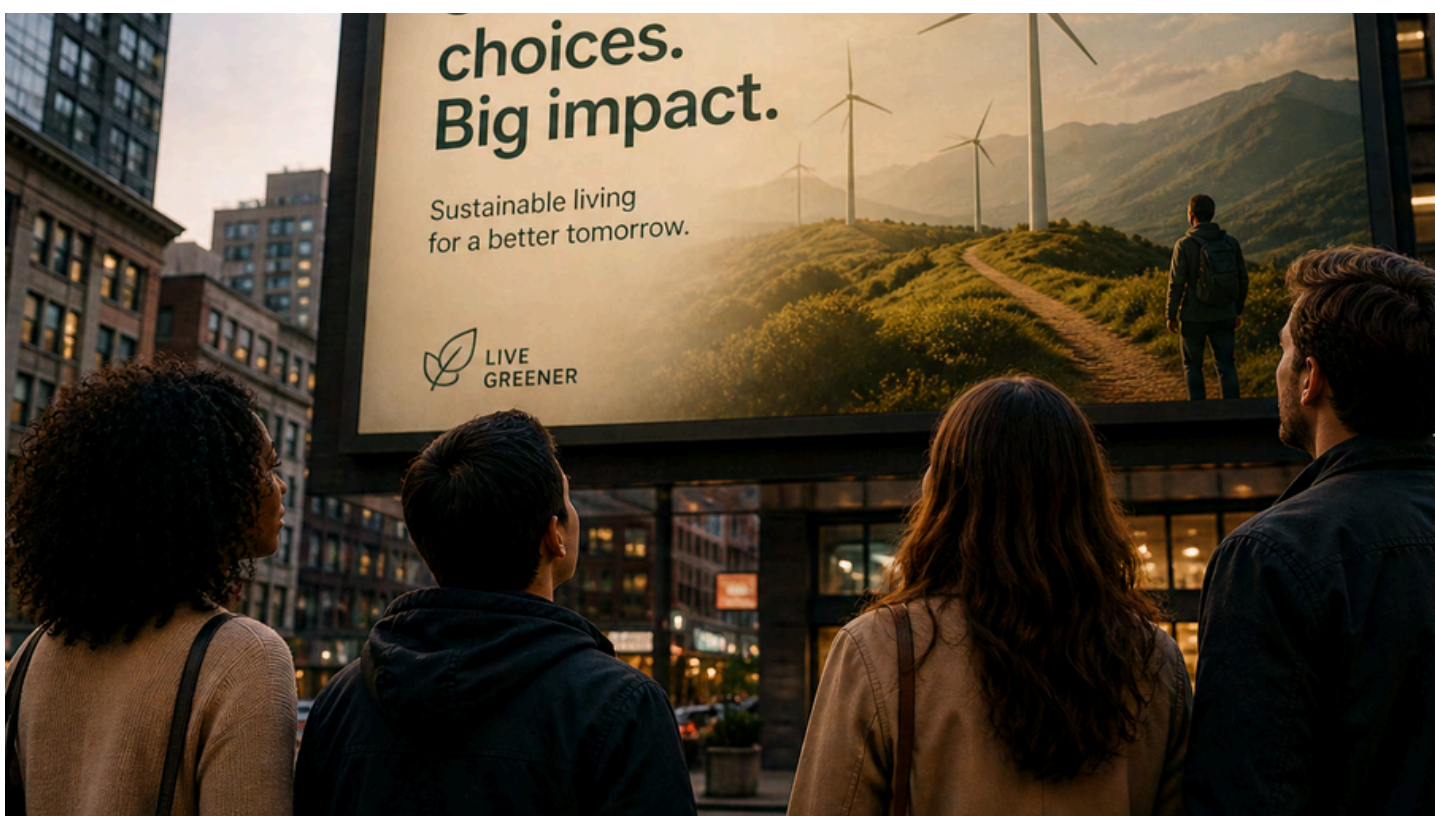
From Findings to Headlines: Exercises

Checklist: Story Flow

- The themes are clear
- The narrative has tension
- Findings support the message
- Nothing unnecessary distracts
- It ends with something actionable

Reflection Questions

1. What surprised us, and why?
2. Which findings are interesting but not essential to the story?



Chapter 9:

The Art of the Hook



The Hook



- Hooks don't create stories. They reveal them.
- The most effective hooks highlight something meaningful without overstating it. They invite attention while remaining grounded in what the research can genuinely support.
- Choosing the right hook is as much about what not to say as what to lead with.
- Not every finding should become a headline. Choosing one often means leaving others aside.

Hook Generation

What's surprising?

What's uncomfortable?

What contradicts expectations?

What feels urgent now?

What would weaken credibility if overstated?

Draft 5 hooks:

1

2

3

4

5



The Art of the Hook: Exercises

Checklist: Is It a Strong Hook?

- Would a journalist care?
- Does it feel fresh?
- Is it tension-driven?
- Would the audience recognise themselves?
- Does it lead to a bigger story?

Local contrasts often surface strong hooks; see Global to Local Mapping Tool for a structured way to explore this.





Chapter 10:

Global Voices, Local Stories



- Global research often aims to speak across markets. But while issues may be shared, experiences rarely are. When local context is overlooked, insight risks becoming generic.
- Consistency enables comparison – but comparability depends on interpretation.
- The same question can mean different things in different markets. Global averages may show scale, but they often hide the differences that explain why a trend exists.
- For research-led thought leadership, those differences are often where the story lives.
- When global research flattens variation:
 - insight loses credibility
 - narratives feel abstract
 - audiences struggle to recognise themselves
- Local nuance doesn't weaken a global story; it strengthens it.



Mapping Global Insight to Local Reality

Use this exercise once global findings are clear, but before narratives or headlines are finalised.

1

Step 1: State the global insight (no headlines)

- What is the core insight the research supports?

2

Step 2: Select markets intentionally

- Choose 1–2 markets that clearly illustrate the insight
- Choose 1 market that contrasts or challenges it

3

Step 3: Pressure-test credibility

- For each selected market, ask:
 - Would someone in this market recognise this story?
 - Is the interpretation supported by the data?
 - Is local context acknowledged?
- If the answer is “no” to any of these, pause.

4

Finally:

- Where might local nuance strengthen, rather than complicate, your global story?

gic storytelling. Meaningful impact.
nger brand, lasting connections.



Section 4

Bringing it All Together



**STRONGER TOGETHER.
GREATER IMPACT.**

THAT'S THE POWER OF PR.





One-page Project Plan

This template can help structure early thinking about where a story might exist.

Purpose

--

Audience

--

Sample Strategy

--

Hypotheses / Tensions to Explore

--

Ideal Headlines (if known)

--

Methodology Notes

--

Hooks to Test

--

Action Outcomes

--



Bringing it All Together: Exercises

Is This Project Ready For Fieldwork?

- Clear purpose
- Aligned teams
- Balanced timeline
- Smart sample strategy
- Methodology signed off
- Questions tested
- Story potential validated
- Success measures agreed

- *Planning Checklist can be used to pressure-test your approach before research moves into the public domain.*
- *See Global to Local Mapping Tool for a mapping exercise to help translate global insights into local expressions.*





Bringing it All Together

Finally



- Research-led thought leadership works best when decisions are made deliberately, and not rushed, assumed, or retrofitted.
- Across this workbook, a consistent theme emerges - clarity upfront enables confidence later. When research is designed with intention, credibility becomes easier to maintain, stories become easier to tell, and influence feels earned rather than asserted.
- This isn't about perfection. It's about creating the conditions in which research can genuinely support the ideas you want to put into the world.
- Whether you're planning a new study, reviewing an existing one, or reflecting on how research is used within your organisation, the principles here are intended to support better conversations and, ultimately, better outcomes.

If you're thinking about how research can more effectively support your thought leadership, taking time to reflect on design, audience, and credibility is often the most valuable place to start.



Planning Checklist

This checklist is designed to be used before research begins and should be revisited as projects evolve. It brings together the core principles explored throughout this workbook - helping ensure research is designed with clarity, credibility, and narrative potential in mind.

Use it as:

- a planning tool at project outset
- a sense-check before fieldwork
- a reflection point before reporting or publication



Planning Checklist

1. Purpose & intent

Before designing the research, be clear on why it exists.

- What is the purpose of this research?
- What conversation do we want to contribute to, or challenge?
- Is this intended to inform internal decision-making, external thought leadership, or both?
- What would “useful” look like six months after publication?

Notes:

2. Audience & influence

Thought leadership only works when it’s designed with a specific audience in mind.

- Who is this research for?
- Who do we want to influence, and how?
- What assumptions might this audience already hold?
- What do they care about right now?

Notes:

3. Sample & voice

Who you survey shapes what you learn and what can be said.

- Does the sample reflect the audience we want to understand or influence?
- Are we clear who should not be included, and why?
- Will respondents have the knowledge or experience to answer meaningfully?
- If this is global research, have local differences been considered?

Notes:

4. Storylines, hypotheses & tensions

Clarity here shapes better questions, without forcing outcomes.

- Are there working hypotheses, themes, or tensions to explore?
- Have potential storylines been discussed & agreed internally?
- Has feasibility been pressure-tested against the audience and methodology?
- Are we open to the research challenging these assumptions?

Notes:

5. Credibility & methodology

Credibility is rarely questioned until it's missing, especially in public-facing research.

- Does the methodology stand up to external scrutiny?
- Are (any) limitations understood and accepted?
- Could we explain how this research was conducted in one clear paragraph?
- Would we be confident defending this research publicly?

Notes:

6. Narrative readiness

Before moving into reporting, pause and assess readiness.

- Do we understand the difference between findings and insights in this project?
- Are we allowing time for interpretation before writing headlines or content?
- Is there space to step back and reflect on what the data is really saying?
- Are we prepared to leave some findings aside?

Notes:

Final check

Before progressing, ask one final question:

Is this research designed to inform, or to influence thoughtfully and credibly?

If the answer isn't clear yet, that's a signal to pause rather than proceed.

↘ **Global to Local Mapping Tool**



Global to Local Mapping Tool



This tool is designed to help translate global research insights into locally relevant narratives, without losing coherence or credibility.

It supports teams working on research-led thought leadership where findings need to resonate across markets, while still reflecting local reality.

Use this tool once global findings have been analysed, but before narratives or headlines are finalised.

When to stop

The mapping is complete when:

- the global insight is clear
- local expressions feel accurate and recognisable
- the narrative can be explained confidently without over-claiming

If any step feels forced, that's usually a sign the story needs more thinking, not stronger headlines.

Step 1: Clarify the global insight

Begin by articulating the global insight as clearly and neutrally as possible.

This should be:

- evidence-based
- free from headlines or language
- grounded in patterns, not single data points

Global insight (working statement):

What patterns support this insight?

Step 2: Identify relevant local expressions

Not every market will express the global insight in the same way, and not every market needs to be included.

Select:

- 1–2 markets that strongly illustrate the insight
- 1 market that contrasts with or challenges it

For each selected market, consider how the insight shows up locally.

Market	How the insight manifests locally	What's driving the difference?

Step 3: Sense-check credibility

Before shaping any narrative, pressure-test whether the local interpretation is fair and defensible.

For each market, ask:

- Would someone from this market recognise this description?
- Is the interpretation supported by the data, not inference alone?
- Are important contextual factors acknowledged?

Credibility notes:

Step 4: Decide how the local insight supports the story

Local insight can play different roles within a global narrative.

For each market, decide whether it:

- illustrates acceleration
- highlights resistance
- reveals a tension or contradiction
- provides cultural or structural context

Role of local insight in the narrative:

Step 5: Translate insight into narrative language (optional)

Only once credibility is established should insight be translated into narrative language. Avoid exaggeration. Aim for clarity and recognition.

Working narrative statement (global):

Local proof points to support the narrative:

Final check: coherence and restraint

Before finalising any outputs, review the mapping as a whole.

- Does the global story remain clear and coherent?
- Do local insights strengthen the narrative rather than fragment it?
- Have differences been used to explain, not sensationalise?

Final reflections:



Arlington
Research



Your story starts here...

Arlington Research

t | +44 (0)118 334 8134

e | enquiries@arlingtonresearch.global

w | arlingtonresearch.global

