

# RESEARCH TO IMPACT PLAYBOOK



## Introduction to the Research to Impact Playbook

### We understand your world

As researchers, you're inspired by discovery and innovation. But alongside advancing knowledge, you also face growing pressure to demonstrate the value of your work. Whether securing funding, preparing for the next REF, or showing how your research creates meaningful societal impact, this challenge can feel overwhelming.

## Why we've created this playbook

At Allegory, we've spent over a decade working alongside researchers and research institutions. We know the unique demands of your field and the importance of delivering—and demonstrating—impact. This playbook distils what we've learned into a practical, step-by-step guide to help you achieve your goals and effectively communicate your work - and your successes.

## Who it's for

This playbook is for anyone in research—whether you're leading a project, managing communications, or thinking about REF. It's here to help you build a straightforward, confident narrative around your work, no matter your starting point. The principles inside the playbook can be applied to most communications projects. So, if you're not a researcher but want to create - and talk about - impact, it will still work for you.

## How it works

We've designed the playbook to be easy to use, with seven clear stages that align with the research lifecycle. For each stage, we explain what's involved, why it matters, and how to approach the tasks. There are checklists to track your progress and examples to inspire you. You can use it independently or partner with us for tailored support and deeper impact.

## What you'll achieve

By following this playbook, you'll be able to:

- Build an effective communications plan aligned with your research goals
- Reach the right audiences and stakeholders at the right time
- Demonstrate measurable impact to funders, partners, and the wider world

**This is your roadmap  
for ensuring your  
research makes a lasting  
difference—and that its  
value is recognised.**

# Your Research to Impact Journey



## 1. Set goals for delivering impact

🕒 In the first 10% of your project time

- Define the outcomes you want to achieve.
- Establish Key Performance Indicators (KPIs) to measure success.
- Align goals with funder priorities and assessment criteria like REF.



## 3. Embed communications into research design

🕒 In the first 25% of your project time

- Build communications planning into the research design.
- Identify key project milestones for communication and engagement opportunities.
- Allocate time and resources to deliver on your communications roadmap.



## 2. Understand your audiences

🕒 In the first 20% of your project time

- Identify the key stakeholders and audiences for your research.
- Research their needs, motivations, and priorities.
- Tailor your messages to resonate with each group.



## 4. Launch and announce your research

🕒 In the first half of your project time, around key milestones

- Announce funding wins, project launches, or key updates.
- Use a mix of formats—social media, press releases, newsletters.
- Create compelling visuals with tools like Canva or Lumen5.

## Start early and build continuously for maximum impact.




### 5. Engage stakeholders and build partnerships

 Throughout your project

- Strengthen relationships through events, meetings, and outreach.
- Foster collaboration by showing mutual benefits.
- Use ongoing feedback to refine your approach.




### 7. Measure and demonstrate impact

 Continuously from the start, culminating in the final quarter

- Track and analyse impact data throughout the project.
- Use metrics and testimonials to create a compelling impact narrative.
- Prepare a final evaluation report tailored to funders or stakeholders.



### 6. Share results and tell your story

 From the mid-point of your project to its conclusion

- Share findings in accessible formats like blogs, videos, or infographics.
- Focus on the practical implications of your work.
- Collaborate with media or institutional teams to amplify your story.

# Stage 1: Setting Goals for Delivering Impact



## What happens at this stage?

At this stage, you define what successful impact looks like for your research. Impact might mean deepening understanding, influencing policy, inspiring public action, changing industry practices, or other tangible outcomes. These goals for impact should align with your research objectives but focus specifically on how your work can make a difference in the world.

## Why it's important

Starting this process early is critical. Understanding what good outcomes look like allows you to design activities that maximise your chances of achieving them. By aligning your communications and engagement with these goals, you'll stay focused on what matters most and avoid last-minute efforts that fall short. Funders and stakeholders also expect clear, measurable plans for impact.

## How to tackle it:

- Reflect on your research goals: What real-world changes do you hope to enable?
- Translate these into impact goals that are SMART (specific, measurable, achievable, realistic and timebound)
- Set Key Performance Indicators (KPIs) to track progress toward these outcomes.
- Share your goals with your team and key stakeholders to build alignment.

## Checklist

- Identify the real-world impact you want your research to achieve.
- Define SMART goals for delivering impact that are aligned with your research objectives.
- Set measurable KPIs to track your success.
- Share and refine these goals with your team and collaborators.

## Hints and Tips

- Start as early as possible—ideally, during the design phase of your research.
- Think about how these goals align with the REF or other assessment criteria.
- Break down goals into short-term and long-term outcomes for better tracking.

## Resources and Case Studies

Insights on linking goals and evaluation to create impact:  
[Measuring Impact](#)

## Stage 2: Understanding Your Audiences



### What happens at this stage?

To achieve meaningful impact, you need to connect with the right people. This stage involves identifying your key audiences and stakeholders—those who can amplify your work, use your findings, or help you achieve your goals. These might include policymakers, industry leaders, funders, the media, and the public.

### Why it's important

Every audience has unique needs, priorities, and challenges. Tailoring your messages ensures that your research resonates with them. Engaging the right audiences early can help you build support, form partnerships, and create pathways for your research to deliver real-world outcomes.

### How to tackle it:

- List all the individuals and groups who have a stake in your research.
- Prioritise your audiences based on their influence, interest, and relevance to your goals.
- Understand their needs and motivations and how your research can address these.
- Develop tailored messages that show how your work aligns with audience priorities.
- Identify the best channels and opportunities to reach these audiences—this will feed into later stages of the journey.

### Checklist

- Create a list of stakeholders and audiences relevant to your research.
- Prioritise your list based on their importance to your impact goals.
- Research their priorities and challenges.
- Draft audience-specific messages that highlight the relevance of your work.
- Identify the most effective channels to engage each group (e.g. social media, events, media outreach).

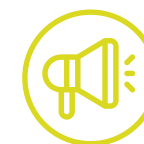
### Hints and Tips

- Think about timing: When will your audiences be most likely to engage with your messages?
- Keep a balance between tailored messages and broad appeals.
- Look ahead to upcoming stages where you'll act on this information, such as sharing results or engaging stakeholders directly.

### Resources and Case Studies

**Case Study:** [Creating tailored strategies to engage diverse audiences](#)

## Stage 3: Embedding Communications into Research Design



### What happens at this stage?

This stage ensures that your communications and engagement activities are integrated into the design of your research project rather than being added as an afterthought. By thinking about impact from the outset, you can design activities that maximise your chances of achieving it.

### Why it's important

Building communications into your project early means you can identify opportunities to engage audiences, refine your messaging, and ensure your research has the greatest possible reach and relevance. Funders increasingly value projects with robust plans for impact embedded from the start.

### How to tackle it

- Review your research objectives and identify where communications can enhance them.
- Identify key milestones in your project where engagement can add value (e.g., funding announcements, interim findings, final results).
- Allocate resources—time, budget, and expertise—for communications activities.
- Create a roadmap for integrating communications throughout the project lifecycle.

### Checklist

- Map out key milestones for engagement in your research project.
- Allocate resources for communications (e.g., team members, budget).
- Develop an initial communications roadmap tied to project timelines.
- Share the roadmap with your team and key stakeholders for feedback.

### Hints and Tips

- If possible, engage a communications professional early—they can bring fresh ideas and expertise.
- Consider co-designing aspects of your research with stakeholders to strengthen engagement.
- Use visuals like Gantt charts to map communications activities alongside research timelines.

### Resources and Case Studies

**Integrating communications into research:**  
[Science, Research, and Innovation](#)

**Case Study:** [Embedding communications in planning to maximise research outcomes](#)



## Stage 4: Launching and Announcing Your Research



### What happens at this stage?

This stage is about sharing your research milestones with the world. Whether announcing a funding award, the start of a project, or interim findings, this is your chance to generate interest and build momentum. Presenting your announcement can shape how your research is perceived and how much engagement it attracts.

### Why it's important

A well-planned launch helps you gain visibility, attract key stakeholders, and create excitement around your work. It also ensures you're controlling the narrative about your research and positioning it in the best possible light.

### How to tackle it

- Craft clear, engaging announcements tailored to your milestones.
- Choose the correct format—press releases, social media posts, or newsletters—and adapt your tone accordingly.
- Use visuals to make your messages more engaging. Free or low-cost tools like Canva or Lumen5 can help you create professional-quality graphics or videos, even with limited design experience.
- Be strategic about timing: Consider when your audience will most likely engage with your message. For example, policymakers might be more receptive during working hours, while social media audiences are often active in the evenings or weekends. Look at historical engagement data, if available, to guide your decisions.

### Checklist

- Write clear, compelling announcements tailored to your milestones.
- Create engaging visuals using free or low-cost tools.
- Identify the most effective channels for sharing your news.
- Plan the timing of your launches to maximise audience engagement.
- Monitor responses and refine your messaging if needed

### Hints and Tips

- If you're new to creating visuals, Canva offers pre-made templates that are easy to customise. For videos, Lumen5 lets you create professional content quickly using text-to-video features.
- Partner with your institution's communications team - or an external agency - if you need support with design or distribution.
- Tie your launch to current events or trends where relevant—this can increase your audience's interest and media uptake.

### Resources and Case Studies

#### Impactful launches:

[Research-based stories to raise awareness and influence](#)

**Case Study:** [Helping a research institute achieve a week-long coverage spike](#)

## Stage 5: Engaging Stakeholders and Building Partnerships



### What happens at this stage?

With your research gaining visibility, this is the time to deepen connections with key stakeholders. This might involve hosting events, participating in panel discussions, or arranging one-on-one meetings. The goal is to foster relationships that can support, amplify, and act on your research.

### Why it's important

Building partnerships creates opportunities for collaboration, increases your reach, and ensures your research resonates with the people who can use it most effectively. Stakeholder engagement also strengthens your credibility and helps secure buy-in for future projects.

### How to tackle it

- Identify engagement opportunities that align with your goals.
- Develop a strategy for each stakeholder or group (e.g. informal chats, formal presentations, workshops).
- Focus on mutual benefit: What can your research offer them, and what support do they provide?
- Use engagement to gather feedback that refines your research and communications

### Checklist

- Create a plan for engaging key stakeholders.
- Schedule meetings, events, or workshops with high-priority partners.
- Prepare tailored presentations or materials for each interaction.
- Capture feedback and use it to refine your approach.

### Hints and Tips

- Be proactive: Don't wait for stakeholders to approach you.
- Leverage existing networks, such as professional associations or institutional contacts.
- Use events to showcase your research's relevance and potential.

### Resources and Case Studies

**Successful stakeholder engagement:** [Coordinating activity between research and industry partners](#)

**Case Study:** [Building influencer engagement for a national research institute](#)

## Stage 6: Sharing Results and Telling Your Story



### What happens at this stage?

This is where you share your findings with the world, presenting them in ways that resonate with your audiences. It's about making your research accessible, relevant, and compelling—whether through blogs, videos, infographics, or news articles.

### Why it's important

Clear and engaging communication of your results ensures your research has reach and relevance. It's also critical for building a track record of impact, which is essential for future funding and recognition.

### How to tackle it

- Tailor your content to your audiences: What do they need to know? Why should they care?
- Use diverse formats to maximise accessibility and engagement.
- Partner with media outlets, relevant stakeholders and project partners to amplify your story.
- Focus on the practical implications of your work and its potential to create change.

### Checklist

- Identify the key messages from your findings.
- Select content formats that best suit your audiences (e.g., blogs, infographics, videos).
- Work with your communications team or external partners to share your results.
- Monitor the response and refine your messaging if needed.

### Hints and Tips

- Keep it simple: Avoid jargon and focus on the “so what?” of your findings.
- Use visuals and storytelling to make complex data more accessible.
- Provide clear calls to action, such as “contact us for more information” or “read the full report.”

### Resources and Case Studies

#### Telling your research story effectively:

[Communicating a research programme with flair](#)

**Case Study:** [Delivering impact for research through a white paper](#)

## Stage 7: Measuring and Demonstrating Impact



### What happens at this stage?

This stage focuses on evaluating how well your research has achieved its goals for impact. Importantly, this is not something to leave until the end. Successful evaluation depends on setting up the proper infrastructure from the start and gathering data throughout the lifecycle of your research project. Doing so gives you a robust foundation to demonstrate the real-world difference your work has made.

### Why it's important

Funders, policymakers, and other stakeholders want clear evidence of impact. A strong evaluation shows accountability, builds credibility, and helps you make a compelling case for future funding or recognition. It's also a vital learning opportunity, providing insights to refine your approach for future projects.

### How to tackle it

- Start by identifying metrics that align with your impact goals—what will success look like, and how will you measure it?
- Build data collection into your project plan from the start. For example, gather event feedback, track media mentions, or monitor audience engagement with your outputs.
- Use tools like Google Analytics, surveys (e.g., via SurveyMonkey or Google Forms), and simple spreadsheets to keep track of data in real-time.
- Regularly review your data during the project to ensure you're on track and to make adjustments if needed.
- Finally, analyse the data to create a straightforward and engaging narrative about the impact you've achieved.

### Checklist

- Define clear metrics for evaluating impact at the start of your project.
- Set up systems for collecting data throughout the project lifecycle.
- Regularly review and reflect on your data to refine your approach.
- At the project's conclusion, analyse your data to create an impact narrative.
- Prepare an evaluation report or presentation tailored to your audiences.

### Hints and Tips

- Don't try to measure everything—focus on a few key metrics that matter most to your goals.
- Include qualitative data, like testimonials or quotes, to bring your impact to life.
- Use visualisation tools like Canva or Flourish to present your evaluation results clearly and compellingly.

### Resources and Case Studies

#### Insights on evaluating research impact:

[The importance of evaluation](#)

**Case Study:** [Long-term impact with consistent communications](#)

## Conclusion and Next Steps

Congratulations on completing the Research to Impact Playbook! By working through each stage, you've laid the foundations for ensuring your research makes a meaningful and measurable difference. Whether you've set clear goals, identified your audiences, or shared your findings, each step brings you closer to delivering real-world impact.

Creating impact isn't just about fulfilling funder requirements—it's about maximising the value of your work, engaging the people who matter most, and leaving a lasting legacy. This playbook equips you with practical tools and techniques to navigate the complexities of communications and engagement with confidence.

### Next Steps

We know that embedding these strategies into your work can feel like a big task, and that's where Allegory can help. With over 13 years of experience supporting researchers and institutions, we've developed services designed to make the process easier and more impactful.

### Talk to us

We'd love to hear from you if you'd like guidance or support at any stage of your journey. Whether it's developing a tailored communications strategy, creating compelling visuals, or preparing for the next REF, we're here to help.

### Experience our "Research to Impact Workshop"

For a hands-on, collaborative approach, our workshop takes researchers and research teams through the playbook in a structured, curated format. It's a friendly, supportive way to embed these tools and techniques into your projects, ensuring you're ready to confidently deliver impact.

Ready to create even more impact with your work?

**Contact Allegory today for a no-pressure chat**

Your research has the potential to change the world.  
Let's make sure the world knows about it.

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