



Getting the Most
Out of Qualitative
Research:

35 TIPS FOR BUILDING A GREAT PARTNERSHIP WITH YOUR MODERATOR

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Finding a great moderator or qualitative research consultant (QRC) that you enjoy working with is information nirvana. You have a capable partner who brings extensive experience, good business sense, and skill in understanding human behavior. Your moderator applies their expertise creatively to your project and your business to deliver valuable and exciting insights. What more could you ask for?

It is not always easy to find a good moderator. When looking for a moderator, look for someone who has a lot of experience in many types of qualitative research, including focus groups, in-depth interviews, mini-groups and online qualitative. Look for someone who does a lot of the type of qualitative research you are considering. In some types of marketing research extensive experience may not be as important, but in qualitative, the more you do, the better you become.

Look for moderators with experience with the population you are going to research. Moderators who specialize in kids may not be the best choice if you're talking to orthopedic surgeons! The same goes for different ethnic groups or if your project is global or multi-national. You will want to make sure your moderator is well-versed and experienced in this type of research. Industry expertise may also be important to you, especially if you are discussing a very complex product or a long decision making process, as is the case in certain B2B situations.

In all cases, check the moderator's references – and make sure those references are for recent projects. You want to find a moderator who is up-to-date and current on the latest trends and techniques in qualitative research

Clearly, the moderator's skills play a huge role in the success of any qualitative research project. However, as a client, you can help your moderator deliver the best possible result. We asked some esteemed focus group moderators to share with us what clients do – and don't do – that help them deliver excellent results.

FINDING A MODERATOR

- ▶ Ask experienced marketing friends and colleagues
- ▶ Search Quirk's Researcher SourceBook (www.quirks.com)
- ▶ Search the Greenbook directory (www.greenbook.org)
- ▶ Search the Qualitative Research Consulting Association member database (www.qrca.org)
- ▶ Ask your trusted focus group facility manager

CHAPTER 1

Tips for Working with Your QRC *Before* the Groups

The success of any research project – qualitative or quantitative – begins long before the data collection. Designing and planning the research appropriately is key to gaining valuable insights. For a focus group moderator, that includes learning about your business and the particular challenges you are struggling to solve, understanding your culture, and forging a strong and supportive partnership with you as the client. **Here are tips to optimize this phase of the project:**

1. **Expect to learn, not just confirm preconceived conclusions.** You may be right, and validation is wonderful. But learning that you aren't right can keep you from making big, expensive mistakes (or even small, embarrassing mistakes.) Keep an open mind and let your moderator guide you through the ins and outs of getting into your customers' heads.

THE MODERATOR SPEAKS:

"Ultimately, I love it when a client really wants to know their customer and provide the best product/service/experience – not just learn something fast to solve this week's need."

2. **Bring your moderator in on the planning phase.** Many clients just love focus groups and think they are the answer to all information challenges. Not so – and your moderator can give you the best advice on this. Plan the focus group project in the context of larger information needs, not just a one-off 'get us this answer' study. Your moderator can give you the best perspective on how to get the information you need – as well as the information you want. Take advantage of that!
3. **Manage your organization's 'politics' and multiple agendas.** As the client, you are the internal project leader. Don't let your moderator be blind-sided or hobbled by corporate politics. Keep your moderator up-to-date on internal situations and challenges that could impact the outcome of the groups so that they can react quickly if needed.
4. Although you are the project leader, **make sure your moderator has access to the owners of the business challenge.** You may be very well-versed on your internal client's information needs, but nothing takes the place of in-person communications with the business owner. Your moderator will bring a different perspective to the discussion and you may all learn something new.

THE MODERATOR SPEAKS:

“In my opinion, the most important part of the moderator-client partnership is being able to sit down with the internal client (the end-user of the research) and hear from them what they believe the research objectives are, what the ‘must haves’ are, their opinion about how earlier research informs or doesn’t inform the current project. I need to hear their answer to the question, ‘If we don’t learn anything else from this research, we must learn _____.’ Nothing replaces hearing this directly from the owner of the business challenge.”

5. **Be open to innovation and experimentation.** Focus group moderators on the whole are incredibly creative. Additionally, the best moderators are always looking for new and more effective ways to encourage consumers to express their attitudes and emotions. Armed with their extensive expertise and experience, apply that creativity to get the information you need.
6. **Respect the value and the limitations of qualitative research.** If you’re not sure what the value and limitations of qualitative are, have a discussion with your moderator. They will be happy to help you.
7. **Allow the moderator to be the qualitative research expert.** Listen to what they recommend about group location, number of participants, and number of discussion topics/issues that can or should be covered given the research objectives. You are paying them to be the expert, you may as well take advantage of their advice. After all, you both want the same result – excellent insight!
8. **Work with your moderator to select the right technology to use.** Just because you read about it in Quirk’s, your friend in another company used it, or a salesperson has been calling you about it doesn’t mean it’s right for your project. Be open to using new techniques and technologies when they work, but don’t assume that all new techniques and technologies work in all projects.
9. **Be willing to give constructive feedback.** The hardest criticism to respond to is, “This isn’t right, and I will only know what is when I see it.” Even if you can’t express what’s wrong, give some guidance! Is it the timing of the group – too much time on some topics, not enough on the others? Is it the tone of the questions? Is it terminology? If something isn’t working, suggest what might be better.

- 10. Treat your moderator like a colleague and not as a vendor.** When you treat a moderator like a vendor, you hold them at arm's length, as if you have to protect yourself from being ripped off or taken advantage of. Some moderators might be better than others, but none will intentionally do a bad job. So put your fear aside and let your moderator in. The closer you allow your moderator to get to your business, the better result they will be able to deliver.

THE MODERATOR SPEAKS:

"I don't like feeling as though I've been brought in as a hired gun. I work hard at my craft and it's only when the client is open and treats me like a partner that I can truly deliver good information and insight."

- 11. Leave yourself enough time to do a good job of preparing for the focus groups.** Allow at least four weeks to plan the project, recruit the participants and prepare the guide and other materials. You can do focus groups in less time, but you will probably have to pay more and the quality may suffer for rushing.

THE MODERATOR SPEAKS:

"In planning the groups, you have to balance different people's schedules and traveling between cities and time zones. It helps to schedule the groups so that you and your moderator can get more than 4 hours sleep!"



CHAPTER 2

Tips for Working with Your QRC *During Set-Up*

Recruiting, logistics, making travel and video streaming arrangements, all of these are part and parcel of a good qualitative research project. There are thousands of details to be considered and working with your moderator through this process ensures that you have a strong foundation for getting the information you need.

12. Keep in mind that the discussion is only going to last 1½ to 2 hours. If the moderator is rushing to get all the questions in, the discussion will have to suffer. So ruthlessly **trim your questions to those that address the objectives**. If there are “nice to know” questions, put those at the end to be addressed only if there is time available.

THE MODERATOR SPEAKS:

“Qualitative research, whether one-on-one or in a group, is, at the end of the day, a conversation. When respondents are asked to fill out surveys, or simply vote, it takes valuable time away from that conversation – and limits the opportunity to uncover insights. Group activities that encourage interaction are beneficial. Ten bowed heads around the table filling out questionnaires is misusing a great methodology!”

13. Remember that this is a qualitative project, so **avoid overloading the guide with questions better asked in a quantitative environment**. (That would be anything that does not lead to a discussion, so yes/no or scaled questions, any type of voting, etc.) The value of qualitative research is the free and open discussion of the topic and hearing the customer’s voice. If you need quantification, conduct a survey to follow-up the qualitative, but don’t rely on focus groups to do that for you.
14. If you are going to show materials (story boards, concepts, a demonstration) in the group, **show it to your moderator early enough** that they have ample time to think about how they are going to explore it in the group and to figure out how to best use the stimuli.
15. Similarly, if you are responsible for actually delivering stimuli materials, **plan to arrive at the facility at least 30 minutes before the group** – and more if there is a tricky set-up. Don’t make everyone (including yourself!) worry about having enough time to set up the materials in the room.

THE MODERATOR SPEAKS:

“I had a client who always delivered the materials to me about five minutes before we were to start the groups...obviously not enough time to become familiar with them!”

16. No one likes to bring up the subject of money, but building a great partnership with your moderator includes both you and your moderator **having the same understanding and expectations when it comes to project costs**. Here are some tips that can help:
- a. Many qualitative research consultants are small businesses. For them, time truly is money, so be considerate of project scope creep. Be on time for meetings and scheduled phone calls. Be responsive. And work with your organization to get your moderators paid on time. (Some facilities require payment of 50% plus incentives up front, so don't be surprised if your moderator asks for expedited payment terms.)
 - b. You must pay incentives to focus group respondents. The marketing research industry as a whole has educated the consumer to expect to be paid for helping out with their opinions and perceptions. Their time and information is valuable, so why shouldn't they be paid? Recruiting without incentives does not work.
 - c. Once you start recruiting, expect to pay more for any changes. Changing cities, dates or times of the groups, recruiting specs, adding in a “homework assignment” for participants to complete before the groups – any change (especially last minute changes) can incur additional costs.
 - d. Cancelled projects typically lead to cancellation fees for the moderator and the facility. They have expended time and effort on your behalf. Just because the project was not completed does not mean they should not be paid for the work that they have done.



CHAPTER 3

In Front of the Mirror – Tips for Making the Most of the Group Discussion

As the client, sitting in the dark and watching focus groups can be a little nerve-wracking. After all, your colleagues and your boss are judging you on how well this goes. However, if you have planned and designed the project correctly, and you have a competent partner in your moderator, the best advice is “Keep Calm and Let the Moderator Do Their Job.” Here are some specific tips for dealing with what’s happening in front of the mirror:

17. Experienced moderators have conducted thousands of groups and developed a sixth sense for respondents who are not going to participate productively in a focus group discussion. If your moderator advises you that a respondent should not participate because they will be problematic, trust your moderator. **Listen to your moderator** if they say they are uncomfortable with having a respondent in the group.
18. One of the most critical times in the focus group is at the very beginning when the moderator is building rapport with the participants, while also establishing authority. **Refrain from micro-managing this process.** Your moderator knows what works for them.
19. **Don’t try to “skip the introductions and just get to the good stuff.”** If your moderator does not build rapport with the participants, there won’t be any good stuff! In addition to building rapport with the moderator, the introductions serve to create familiarity and comfort among the group members, so they will feel free to express varying and even dissenting opinions.
20. **Your moderator should not have to “sell the product.”** If the participants don’t understand your concept or stimulus, that is your key finding. Don’t expect the moderator to explain it to them – although they should ask participants what questions they have or what information is missing. The moderator isn’t going to be there when your customer is buying the product, so the product should stand on its own.
21. **Don’t under-estimate the power of the emotions that your customers express.** It may be easier to deal with features, prices, hard facts and tangibles, but if you listen for when people say they feel unsure, happy, excited, sad, frustrated, good – you can uncover huge opportunities for your business. And qualitative research excels at facilitating the expression of human emotions.

- 22.** At the end of the session, when the moderator gives you the opportunity to ask follow-up questions, **ask follow-up questions.** This is not the time to introduce new topics (“while we’ve got them here”) or to ask them how much they would be willing to pay for an idea that they have just said repeatedly they would not buy. And, it’s okay not to have any follow-up questions. That just means everyone has done a good job!
- 23. Trust the process.** Try not to interrupt the group with too many notes or by asking the moderator to come into the back room to consult. If you have planned properly and communicated effectively with your moderator in advance of the groups, your moderator will get the information you need. (It may not be the information you expect, but it will be the information you need!)

THE MODERATOR SPEAKS:

“One of the great benefits of working with a really good facilitator is watching their ability to “get out of the way” and learn from the participants by listening to the language that they use to state the value proposition of the product or service being evaluated. How do they describe it? Do they see value in the product or service for them? If the product takes 30 minutes to explain through exchanges between the moderator and the group participants then either the stimulus, the concept, or the product itself is lacking.”



CHAPTER 4

Behind the Mirror – Tips for Managing Observers

24. Thirty minutes prior to the group is not the right time to rewrite the moderator's guide.

Minor tweaks are fine, of course, but major changes should be made well in advance of the group to give your moderator adequate time to review them.

25. Manage who will be viewing the groups, and make sure they understand their role as an observer and what will be expected of them. Establish the ground rules: who comes, when they need to arrive, how long they will be expected to stay, how they should behave. Remember – you are here for the groups, not to have a staff meeting just because you're all in the same place at the same time!

THE MODERATOR SPEAKS:

"The back room was like Grand Central Station. People were dropping in and out, staying for a couple minutes, and then leaving. For some reason, they just needed to "be seen," not actually learn anything from the customer. As the moderator, I didn't have a clue who was getting what information on the client side. It was a disaster."

26. In the client viewing room, you must manage and control the 'politics' of your organization and the multiple agendas of the observers. **You are the leader!** Don't let others subvert the groups by taking control away from you.

27. Pay attention! Focus group facilities have gone out of their way to make the viewing experience comfortable, as well as to allow clients to be productive while viewing the groups. But it is possible to get so wrapped up in multi-tasking that listening to the group discussion gets lost. Don't drop in and out – you won't get the full picture of what the respondents are saying. Also, if you plan to give feedback to the moderator, you will need to watch and listen to the groups.

28. It is the moderator's job to manage the facility. If you or your colleagues ask for services from the facility that are beyond the scope of the contracted parameters set by the moderator, you could end up with unexpected extra charges, so always go through your moderator if you need something from the facility.

29. Respect the group participants; they are your customers. You set the screening requirements, so unless the participants lack the right qualifications to participate in the group, refrain from making judgements or being critical of them. Be patient and open-minded – you may be surprised at what you can learn.

THE MODERATOR SPEAKS:

“All researchers have their favorite war stories from behind the glass. Here’s one of mine: When doing groups on a new laundry product, the clients wanted to “yank the lady on the far left,” because they were certain she was drunk. In escorting the group from the lobby into the group room I had noticed she was walking with a cane and she had joked about her “drunken sailor walk.” When she introduced herself, her words were slightly slurred. I chose to keep her in the group and was rewarded when the woman described how her MS might prevent her from being an enthusiastic user of the product. It was a “fabric softener ball” and she could not imagine pouring the product in to the tiny slot with success given her physical limitations. It would have been awful to miss that insight!”

30. Negotiate with your moderator in advance about giving you a verbal debrief. Some moderators prefer not to debrief after the groups, as they gain more insights by reviewing the discussion and would rather wait until the full report. Some moderators are okay with debriefing after each day’s groups (as long as you get done early enough to get a good night’s sleep!). Discuss this with your moderator ahead of time so that you both know what to expect.



CHAPTER 5

Tips for Working with Your QRC *After the Groups*

Once the project is completed, you face the hard work of turning observations and information into insight. Insights that matter drive new ideas, thinking and behavior within your company. These are the “ah-ha” moments that marketing researchers live for. But they are not easy to come by and working with your QRC can increase your chances of finding them.

- 31. Agree in advance what type of reporting you want and when it will be due.** If you haven't asked for a Topline Report, you won't get one. But if you decide at the last group that you really do want a Topline Report, don't expect to get it the next day.
- 32. Allow the research objectives** -- not corporate politics or corporate “this is how we do it” -- to determine the style, format, and content of the final report. PowerPoint may be great for breaking the research results into bite-sized chunks and sound-bites, but inadequate for actually conveying needed, useful, detailed information pertaining to the research objectives.
- 33. Ask for a presentation and make the time to attend with a thoughtful, open perspective.** A good researcher knows that insights are rare and hard to come by, and doesn't expect the moderator to deliver them alone, but only in collaboration with the client team. The presentation is an opportunity to discuss what you learned and to put that learning into the perspective of your business operations.
- 34. Don't look for percentages in qualitative reporting.** Remember, you have only heard the voices of the people who participated in your research project. Reporting percentages on qualitative research can be very dangerous if those reports are read by individuals who do not understand the nature of qualitative. Moreover, if you have structured this as a strong qualitative project, you won't want the percentages anyway.
- 35. Respect the ethical standards that QRCs abide by to preserve their reputation and the**

reputation of qualitative research. Don't ask them to bend those standards by “shading” the report language to make results appear more positive or negative than they are, or ask them to aggregate the findings if you changed the moderator guide between groups. If you are unsure of what those standards are, ask your QRC. They will be happy to share them with you.



SUMMARY

Building a great partnership with your moderator begins with following a few basic guidelines:

- ▶ **Be transparent.** Maintain open and timely communications with your moderator.
- ▶ **Be considerate.** Treat your moderator as you would want and expect to be treated.
- ▶ **Be the leader.** Manage your company and your team to ensure the project's success.

If you want to get the most out of your qualitative research project, take advantage of your moderator's experience, creativity and expertise. Treat your moderator as a partner and work together to complete an exciting qualitative research project that yields valuable insights that result in business success!

THANK YOU TO THE FOLLOWING QRCS FOR THEIR INSIGHTS AND ADVICE!

Greg Rathjen, Principal, Marketecture Marketing Research

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