

The metamorphosis of a qualitative researcher

From a small West Texas town, rock band Los Lonely Boys reached national fame by blending multiple rock influences into their own distinctive style and selling it to audiences across the country. Los Lonely Boys offer fans a fresh, unique and innovative sound all their own, yet one can hear in their songs the unmistakable influences of rock pioneers Stevie Ray Vaughn, Ritchie Valens, Chuck Berry and Carlos Santana. In an interview posted on the band's Web site, guitarist Henry Garza described their sound this way: "I call it my music burrito theory. What we've done is made like our own tortilla, with all the knowledge of all the greats that are out there...we put 'em inside the tortilla, fold it up in there, we make our own burrito and we're sellin' it to the world."

Are moderators like rock stars? Yes, to the extent that there is an artistic element to what we do, a natural talent, and we build upon this talent through inspiration from others - in our case, fellow moderators. There are further similarities: successful rock stars have good managers, successful moderators have good mentors. Rock stars reach fame by constantly taking the stage, rehearsing and performing, until they produce a sound that sells out concerts. Moderators hone their skills one focus group at a time, until they build a reputation for delivering actionable, strategic qualitative information.

Part II: Rock star moderating - be inspired, find a manager, take the stage

Be inspired

As a burgeoning qualitative researcher, I realize the value of optimizing my moderating style by drawing from the techniques of other moderators. I prefer to follow the approach taken by Los Lonely Boys: recognize your innate strengths, draw from multiple artistic influences, and blend into a unique style that accomplishes the end goal - pleasing the audience. In the case of Los

Lonely Boys, they took their Tejano music roots, mixed in rock influences and created a new sound altogether. While the purpose of the "performance" is quite different, moderators and rock stars both need to offer fans/clients something fresh, effective and fulfill-



By Kelly Heatly

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ing to keep them coming back.

Since moving into an exclusively qualitative role six months ago, I have been strongly influenced by veteran moderators at M/A/R/C as well as by excellent RIVA Training Institute instructors. Thus, I have blended specific techniques and approaches I learned from these great moderators into my own style. Here are a few examples of my moderating influences:

- From Will Leskin, M/A/R/C Research: his patient approach and interview timing and pacing, which put respondents at ease, thereby eliciting rich information. I have also picked up on Will's creative use of worksheets during focus groups as a time-saving means to obtain unbiased responses from participants.

- From Joan Treisman, M/A/R/C Research: her ability to be assertive and direct with respondents to obtain key information without appearing assertive or direct, a difficult skill to master but vital to the task at hand.

- From Vivian Thonger, RIVA instructor: her vibrant presence combined with smooth politeness liven up respondents, earns their respect and centers control in the room.

- From Sandra Kluttz, RIVA instructor: her ability to keep the energy flowing through the room by throwing out bits of humor and wit while expertly fading into the background once respondents open up. I also value her effective use of short, simple questions to extract clear and detailed answers from participants.

I interviewed Kluttz to find out more about her inspirations and influences during her 18 years of moderating. She was drawn to moderating by the creativity it demands. Early exposure to other moderators made her realize that some techniques would work for her and some wouldn't. "It's like fashion-magazine shopping. You look at things and think, 'That's

beautiful, but there's no way it would ever look good on me.' It's the same with moderating. You can try it, adapt it, and make it your own. That's being the authentic you," she says. The ultimate benefit of using your own style? The more authentic you are with respondents, the more authentic their responses will be.

Find a mentor

While rock stars find managers who can guide the band to stardom through lucrative record label contracts, concert bookings and promotions, moderators need mentors who can guide, listen, advise and teach best practices. Mentors are also likely to be those who have the strongest influence on your moderating style.

Training and development expert and author Chip Bell (1996) describes the best mentors as "facilitators and catalysts in a process of discovery and insight" who "practice their skills with a combination of never-ending compassion, crystal-clear communication, and a sincere joy in the role of being a helper along a journey toward mastery." (p. 8) I find Bell's definition of a mentor complete in the context of qualitative research, and I am fortunate to have a mentor who fits the bill perfectly. My primary mentor and supervisor, Will Leskin, is not only an influence on my personal moderating style but also a facilitator, a helper, and a guide to me during my metamorphosis into a qualitative researcher.

For those new to a qualitative research career, I recommend finding a good mentor to help you master the art of moderating. I turned to Leskin and RIVA founder and mentor extraordinaire Naomi Henderson to describe the key characteristics of a good mentor. In summary, a good mentor does the following:

Takes a parent-child approach initially; serves as a resource later.

The parent-child approach describes the mentor's desire to satisfy the protégé's initial curiosity and eagerness to learn, ultimately helping the protégé grow, reach potential and succeed as a unique individual, just as a parent does a child. Leskin considers his mentor role to evolve from an interdependent relationship into a passive, available resource once the protégé has gained a foundation of expertise: "Initially, there is a parent/child dynamic to the relationship. I am lending my experience to the person I am mentoring because almost every situation is new, and there are problems/issues that they've never encountered before. Eventually, my role evolves into being one of the resource wells that the person dips their cup into from time to time when they run dry."

Marries your skills to new insight.

Henderson believes good mentors add new insight to the protégé's existing skills and abilities so you "come out on the other side with a better product," thus fostering the aforementioned concept of using outside influences to optimize your personal style. This is not a "do what I do and you'll be fine" approach, she says. This doesn't account for gender, age, culture, reference and personality differences. Rather, a mentor should encourage a protégé to model the "excellence" of the mentor, not copy the mentor. This ensures the authenticity of moderating style and the ultimate authenticity of information obtained.

Uses a Socratic style of teaching.

Two of Henderson's early influencers and mentors, NLP founders John Grinder and Richard Bandler, use a Socratic method of teaching, where the instructor asks the class the question, and lets the class figure it out. Henderson explains the application to moderating: "Try it

out and see if it works. Not knowing is the best way to learn new information.” Consequently, she models her approach to RIVA training after this method, a “do it, and we’ll coach you to excellence, not tell you how to do it” approach.

A mentor must also be a good listener, engaging in what she calls interstitial listening (listening to what is not said as well as what is said), probing for the underlying, subliminal question or issue, thereby helping the protégé on a much deeper level.

Each of these mentor qualities supports the aforementioned concept that successful moderating stems from blending outside influences into your own style to optimize the authenticity of the moderating technique and, ultimately, the authenticity of the information obtained. Assuming your mentor is a fellow moderator, here are tactical ways to use your mentorship as a means to achieve moderating success:

- Observe your mentor moderating as often as possible via in-person or whichever technology works best with your schedule (i.e., Webcast, CDs, audiotapes).

- Ask your mentor to view your interviews and offer constructive criticism.

- Collaborate with your mentor on qualitative research design, discussion guides, reporting and reporting.

- Most important: welcome the advice, hear it, then make it your own!

Take the stage: practice, practice, practice

Rock stars do not become who they are simply by having talent and a unique style. They take the stage and master their sound and style one performance at a time, rehearsing with the band and improving upon each live performance. This is how Los Lonely Boys reached amazing fame from their humble roots. “Our dad told us the sky was the limit so we would just listen and listen and listen and kept playin’ and learnin’ and practicin’ through our whole childhood, never stopping,” Garza said.

Moderators are no different. Until I have established a loyal following, I can hone my moderating skills by taking the stage in a variety of ways:

- Conduct mock focus groups with employees and friends prior to conducting live groups. Mock groups serve a dual purpose: developing your moderating abilities and optimizing the information drawn from the live groups, since you will

have practiced the mechanics of the discussion guide.

- Conduct pro bono focus groups for a community, charitable cause or company or organization on a shoestring budget. No one will turn you down!

- Be your company’s resident in-house moderator for internal initiatives such as designing new work processes and products.

Be a star

So, with a mentor to guide me, I continue to listen, observe and learn new techniques via other moderators to enhance my own style, with the aim of offering a fresh, effective approach to drawing out consumer thoughts and behavior. The more I perform my art before actual respondents and clients, the more unique and valuable I’ll become as a moderator. Then perhaps one day clients will describe my moderating in the way fans describe Los Lonely Boys’ music: “rife with engaging hooks, expressive lyrics and melodic sumptuousness.” A lofty aim, perhaps, but I’ll strive to ensure that I meet clients’ research objectives, help them achieve their business objectives and inspire them to call me back for another performance. | Q