

The metamorphosis of a qualitative researcher

Imagine the following conversation between a qualitative research consultant (QRC) and a potential client. The client requests a specific research methodology that doesn't match the research objectives and asks for limited involvement from the moderator:

QRC: "May I take your order?"

Client: "Yes, I'd like four focus groups in two cities."

QRC: "What are your research objectives?"

Client: "We would like to understand what drives consumers to purchase personal health care products and how they emotionally connect with our brand."

QRC: "Would you like a discussion guide and report on the side?"

Client: "No, thanks. Just the focus groups please."

QRC: "OK, four focus groups in two cities coming right up. That will be \$xx,xxx."

It's far-fetched, but most of us who specialize in qualitative research have found ourselves in similar situations, reduced to functioning as an order-taker rather than as a consultant.

Since moving into a qualitative role over a year ago, the hurdles I've encountered as a QRC have surprised me. Once believing that moderating would be the most difficult skill to master, I've discovered that learning to be a qualitative research consultant is by far the most significant challenge. By consultant, I mean being responsible for the functions of design, moderating and analysis for every project. Ultimately, I am responsible for the outcome of the research, and I share in the client's strategic decisions made and actions taken as a result of the

research.

I believe the research profession as a whole makes it challenging to assume the role of consultant in a qualitative context. Most market researchers have limited qualitative experience. After all, only about 14 percent of all research is qualitative (2006 ESOMAR Industry Study on 2005). Therefore, QRCs have a unique responsibility to ensure qualitative research is implemented properly. This can only be done by assuming a partnership role, working directly

Part III: Sit at the table, not behind the counter



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and proactively with clients – in other words, taking a seat at the table.

This realization hit me while attending the Qualitative Research Consultants Association (QRCA) conference last September as a new member and attendee. Inspired by the thoughts shared by J. Robert Harris, chair of the QRCA Professionalism Committee, who wrote the article, “The Death of Professionalism,” published in the association’s July 2006 *Connections* newsletter, I turned my focus on mastering consultancy as a way to really make a difference in my career, in my client’s mind, and more indirectly, in the qualitative profession.

The premise for Harris’ article is powerful if not controversial: he believes the QRC profession is declining due to the “renewing of our professional responsibility to provide consultation, instead of just moderating, in the research that we conduct for our clients.” By willingly accepting moderation-only projects, known as walk-ons, Harris believes QRCs are slowly “eroding the efficacy, the reliability, and therefore the overall confidence that research buyers have in qualitative research.” The potential damage to the value of qualitative research is real. After all, many will never forget Malcolm Gladwell’s scathing criticism of focus groups in the 2005 *Advertising Age* article “Focus Groups Should Be Abolished,” in which his keynote speech at the American Association of Advertising Agencies’ Account Planning conference published was excerpted.

The bottom line: While it’s difficult to take responsibility as a consultant, being an order-taker is a huge disservice to the client and to the qualitative research profession as a whole.

If you are a QRC and often find yourself in an order-taker role, here are three “consultant” approaches I’ve learned to follow when faced

Table 1: Considerations for Qualitative Research Methodologies	
Considerations	Appropriate Applications
Group vs. One-on-One	Group: Use when ideation is needed (i.e., product/creative development and determining unmet marketplace needs). One-on-One: Use when the research involves a choice among multiple offerings (group bias is avoided), depth of behavioral and attitudinal understanding is needed, or the topic is sensitive.
In-person vs. Phone/Web	In-person: Use if the creative process is enhanced by being in-person or when presentation of two-dimensional stimuli is required. Phone/Web: Use when it’s not feasible for respondents to meet at a central location, sample of respondents is too small for one locale, or the client’s budget or timeline does not allow for travel.
Snapshot vs. Temporal	Snapshot: The qualitative interaction will capture the necessary information in one session. Temporal: The information requires interaction with respondents over time such as accomplished through online discussion boards.
Discussion-based vs. Observational	Discussion: Use when a discussion, in-person or via phone/Web, effectively captures the information needed. Observational: Appropriate when motivations for certain behaviors cannot be easily articulated by respondents due to lack of self awareness.
Respondent Factors	Certain respondent demo/psychographics in conjunction with the subject matter may overshadow all other considerations.

with a new qualitative project, each focusing on the design and analysis functions, listed in order of priority.

Ideal approach: become a partner (sit at one end of the table)

Design

First and foremost, my responsibility as a consultant is to recommend the best research methodology. I base my recommendation on a comprehensive set of considerations (Table 1) provided to me by my qualitative mentor, Will Leskin, vice president of qualitative services at M/A/R/C Research.

Once the methodology is determined, my responsibility as a QRC is to write the discussion guide, even if the client provides a draft or outline of the topics they want discussed. In fact, I have found that a collaborative approach works best and ensures all are on the same page. Ideally, QRCs take these proactive steps to ensure the discussion guide captures the desired information:

- Participate in an initial kick-off meeting to revisit research objectives and confirm how the information will be used on the back end.

- Prepare a guide incorporating all aspects discussed in the kick-off, not just those outlined in the RFP. Including an explanation or purpose statement for each section of the guide helps the client understand how the discussion will

accomplish research objectives.

- Walk the client through the guide verbally instead of sending it via e-mail and waiting for approval. This way, the client’s research team understands your proposed approach, and the guide receives buy-in from all members involved.

Analysis

Once moderating is complete, I believe a QRC’s most important function and obligation is making sure the information captured is analyzed objectively and communicated in a way that leads to good strategic action. At this stage, the QRC should “remain at the table” with the client, providing an objective voice among those with a vested interest in the outcome of the study. Ideally, QRCs provide a topline report a few days after fielding followed by an executive-ready full report within a few weeks.

Plan B approach: find a happy medium (sit somewhere at the table)

If a client is set on a specific research plan that is at odds with what you would recommend, I have found there is always a way to meet in the middle that will still accomplish research objectives while pleasing the client.

Design

Some clients prefer a specific methodology based on past experi-

ence or comfort level. For example, I have found that many clients prefer focus groups because they like to observe as many respondents as possible “live” from the back room, often alongside other members of the research team. But what if study objectives can’t be met with focus groups? A solution is to meet in the middle by recommending a “second-best” approach or a hybrid methodology that still meets research objectives.

An example of a second-best approach: A client once requested focus groups for a qualitative concept test where the objective was to elicit reactions and understand the emotional response to multiple concepts. While we recommended in-depth interviews (IDIs), the client was more familiar with focus groups and had an entire team of internal stakeholders to please. Therefore, we offered quads as a way to present multiple stimuli to respondents and gain a greater depth of insight per respondent yet still net the same number of respondents using a group methodology.

An example of a hybrid methodology: With this approach, a portion of the research is conducted using a methodology preferred by the client, and the remaining

research is conducted using a more ideal format. For example, I worked on an IDI project where we needed a geographically-dispersed, hard-to-reach respondent. The client did not embrace the concept of conducting telephone in-depth interviews, despite teleconferencing options with private lines for backroom discussions. So, we conducted the first round of IDIs at a facility with backroom viewing, debriefed and made revisions, and then conducted the remaining interviews by phone.

Analysis

Some clients intend to analyze qualitative findings and prepare the final report themselves, hiring a QRC for moderation only. In this case, the QRC could request a debrief following the groups and provide a detailed summary of the debrief in lieu of a full report. Similarly, for clients who intend to write the discussion guide for the moderator, the QRC could set up a brainstorming session prior to fielding to talk through topics and discussion ideas.

Last resort approach: pass (don’t sit at the table)

Some clients are very knowl-

edgeable about qualitative study design, methodology, and analysis and only seek to fill the moderator function. However, if you believe the research plan set forth will not meet objectives or you are unable to consult on design or analysis, consider passing on the business. While this can be financially painful, you’ll likely avoid the cost of failed research and lost opportunity.

A foundation

Having these three distinct approaches provides me with a foundation on which to stand as a consultant. As I continue on my qualitative research path, I realize the enormous fulfillment of actually helping a company improve its products and services based on the information I elicited, analyzed and communicated back in an objective and action-ready format.

This sense of fulfillment is only possible when I act as a consultant and partner to my clients, providing them with my expertise in research design, moderating and analysis. But enough about me. Qualitative research as a whole is strengthened when clients reap the benefits of sound, objective and powerful insight garnered by working together at the table with our clients. | Q