

# 6 STEPS TO PERFECT QUAL

The L&E trust guide to ensure the success of your project



STEP 1

# QUALITATIVE RESEARCH DESIGN

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# STEP ONE: QUALITATIVE RESEARCH DESIGN

## Starting out on your qualitative journey

In a world focused on ‘how much,’ it’s qualitative research that digs deep to uncover the truth in consumer behavior. If the goal of qual is to explore rather than confirm, then the best qualitative research is in the art of asking the right questions, with the right people, and sharing the journey they take you on, in order to result in true insight.

Our series of six white papers and webinars is designed to support you every step along the way in your project – to provide a guide to the key elements that will drive success and how we at L&E can help you.

Starting out on your journey, this paper will guide you through qualitative research design best practices to provide you with the best design to achieve the best insight.

# HOW TO DEFINE THE CLIENT PROBLEM

**The first step to getting the best insight is to give the client exactly what they are looking for. In order to do this you must listen to the client very carefully to clearly identify the problem.**

The problem will guide the rest of the research to find a solution for the client.

The biggest challenge is often in getting the client to focus in on the single, overriding problem. They are likely to say they need to find out several things, and some of them can be quite disparate or tactical. So use your qualitative skills to encourage them to 'ladder up' – not so as to escape meaning but to simply get to the root of the problem. For example, the client might see the question to be about the layout of their packaging design elements. But through exploring the problem together, you might find that in fact the problem is not so much about the layout, but about an overall brand message that is

not getting through with the current layout. A brand messaging problem will inform and guide a very different research design than a packaging design problem.

So think strategically – ask the client to identify their broader business challenge and then determine exactly how the research fits in.

“

**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. – *Moderator*





# HOW TO STRUCTURE THE “BIG QUESTION” IN A QUALITATIVE APPROACH

As one of the most important parts of qual, identifying the right question is crucial to guiding the objectives and methodology. Once you have a really good understanding of the client’s real business challenge, you can narrow down the purpose of the study to respond directly to the client problem, with the answer to the question resulting in a solution.

When structuring your question, be sure to focus on the client’s main business goal, which is providing actionable insights.

The research question is the first indication that you’re on the path to qualitative research. Quantitative research involves causal relationships, but with qualitative research you’re exploring a phenomenon.

A few tips on structuring your research question:

- Identify the main situation you need to explore.
- Begin the question with ‘what’ or ‘how.’ Avoid starting with ‘why’ as this implies causal relationships.
- Avoid quantitative words such as cause, effect, relationship, and influence.

This is the number one goal for corporate researchers, but regrettably it’s also the number one challenge. But according to the 2016 Quirk’s Corporate Research Report, researchers view qualitative tools to be more effective in providing actionable insights when compared to other newer research methods such as mobile-specific surveys. Therefore it’s suitable that providing the client with actionable insights should be the focus of qual. But in order to provide the desired actionable outcome, researchers must first focus in on the client problem and get the “big question” right.

# WHICH QUALITATIVE METHODOLOGIES ARE SUITABLE FOR CERTAIN APPROACHES?

**Qualitative research involves a set of methodologies all working toward a common goal, but it's important to consider which qualitative methodologies are appropriate for different approaches.**

Although qualitative research methods are designed to answer the 'why?' of consumer behavior, it gets deeper than that. There are a variety of tools to bring to bear, many of which apply better to one problem than another.

This section lists examples of qualitative research goals and their respective methodologies.

**Establish a unique brand position.** No matter what, customers will always have

multiple options to choose from, which makes differentiating a brand from the competition essential. Qualitative research pins down benefits and characteristics of a brand that a target audience perceives as valuable and compares those benefits to competition. This is often done through techniques such as focus groups and in-depth interviews.

**Define customer and brand values and voice.** Qualitative research offers methods to explore whether a brand's core values reflect those of its audience, and align products and services accordingly. This is done through techniques such as emotional measurement, which explores and validates emotions, allowing the researcher to understand how

the brand is aligning itself to the heart of the consumer. Projective techniques such as imagery and metaphors also show emotional connections between consumers and brands.

**Pin down brand weaknesses.** Understand why a brand isn't competing well. Qualitative tools explore service, product quality, and communication efforts. These techniques, such as at-home tests and in-depth interviews, also identify ways to improve brand performance to rise above competition.

**Hear the voice of the customer.** With a good moderator, qualitative tools such as focus groups always expose the voice of the customer. These tools isolate the factors customers use in making purchase decisions,



evaluate satisfaction levels, understand the language customers use in reference to the brand, and understand their experience with product use or services.

**Gain deeper insight.** Qualitative research techniques access deeply held feelings and beliefs. Participants have the time to reflect deeply on their perceptions, beliefs, and the reasons behind their behavior. For example, in-depth interviews work well with sensitive or personal topics, as well as topics that typically involve individual assessment and decision making. Some of the latest qualitative technologies also allow you to speak to larger audiences, collectively get feedback more rapidly, or speak with customers for longer durations to dig deeper into the life of the consumer.

#### **Innovate and improve products.**

Qualitative research allows brands to explore new products and innovations by working closely with consumers to identify unmet needs and dissatisfaction with current solutions - and avoid new product failure. Focus groups and ethnography are very helpful techniques for developing new products. Observing the consumer preparing to use a product, using a product, and then evaluating the use of a product can reveal ways to improve concepts or come up with new concepts. Mobile ethnography and some online communities can address ideation, concept evaluation, and competitive assessment. Usability tests also help determine whether a product or service meets its intended purpose, identify challenges, and test alternative concepts before the launch.

**Improve customer satisfaction.** Improving customer satisfaction takes more than just measuring satisfaction and calculating a Net Promoter Score. It's about understanding what satisfies customers and why, and the only way to do this is through qual research such as in-depth interviews, focus groups, and even online communities.

#### **Identify problems that need solutions.**

One of the most important applications of qualitative research is in exploring how consumers currently purchase products and services, how much they like these products and services, and how they would improve the products and services they are using. Focus groups, in-home or on-site tests, and in-depth interviews are excellent techniques for identifying problems in using a product or service.



# HOW TO CREATE MODERATOR GUIDELINES

As a moderator's skills play a big role in the outcome of a research project, moderators should be experienced and well-versed in several types of qualitative research (including the latest trends and techniques), the population they are researching, and the industry or product they are researching.

Here are a few tips to help prepare:

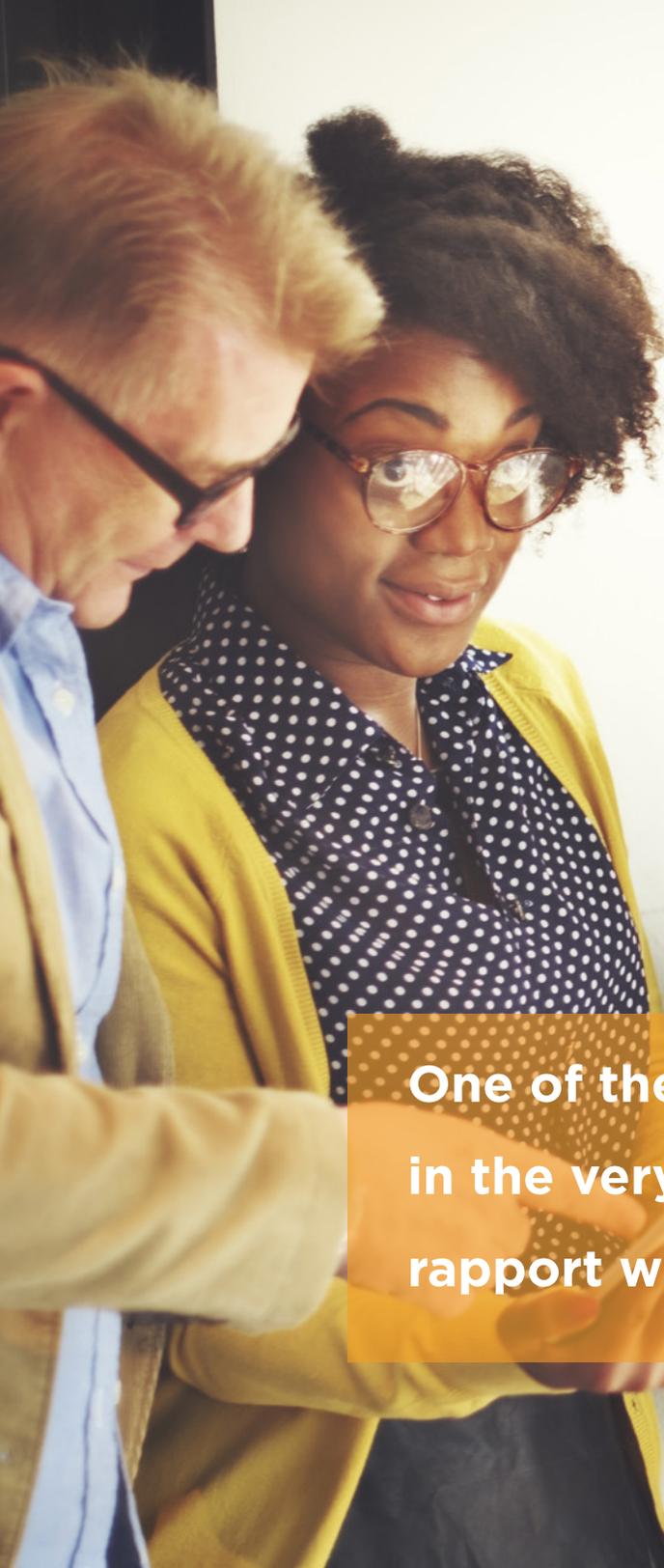
**Allow for innovation.** Moderators can be very innovative and creative, and often introduce new and more effective ways to encourage consumers to open up and express themselves. Prepare for creativity that may take place on the spot, in the heat of the action.

**Get involved in the planning stage.**

Moderators should work closely with the end-client to determine the right methodology to access the right insight. Discuss the best group location, number of participants, and number of discussion topics that should be covered given the research objectives.

**Cut out any questions that don't address the objectives.** Moderators are limited to 1.5 - 2 hours. This should be considered to avoid rushing through topic discussions or missing out on important insight. Plus, studies clearly show consumers have limited windows of attention, which means making sure your client is focused and highly productive with what little time you have with research participants.

**Avoid quant questions and looking for percentages.** Moderators must avoid all questions that could instead be asked in a quantitative study. Qualitative environments are meant to encourage discussions which are open to hearing the customer's voice.



**Review materials ahead of time.** Story boards, concepts, and demonstrations should always be reviewed prior to the group, allowing plenty of time to prepare the best method of presenting and using the stimuli.

**Never skip the introduction.** Introductions create comfort within the group and should never be interrupted or skipped.

**Don't sell the product.** If the group members don't understand the concept, that in itself is the key finding.

**Establish rules for observers.** Discuss who will be viewing the groups and make sure they fully understand their role as observers.

**Discuss the debriefing process in advance.**

Some moderators prefer not to debrief after the focus groups as they gain more insight by reviewing the discussion and writing the final report. However, other moderators prefer to debrief after each day's groups. The client should be informed of the moderator's process to know what to expect. Also discuss in advance what type of reporting is expected and agree on a deadline. The research objectives should determine the style and content of the reporting format chosen to help your client solve their business problem.

**One of the most critical moments of a focus group is in the very beginning when the moderator is building rapport with the group while also establishing authority.**

# HOW TO DEFINE SAMPLE SIZES

**In qualitative research, variety is the spice of life. Researchers often have different opinions in regard to the number of participants in their groups. Some firmly believe that 12 is the magic number, while others are satisfied with 8.**

Therefore it's necessary to ensure focus group facilities offer a variety of settings to accommodate groups of all sizes.

To determine the right size, research objectives and the behavior of the target audience must be considered.

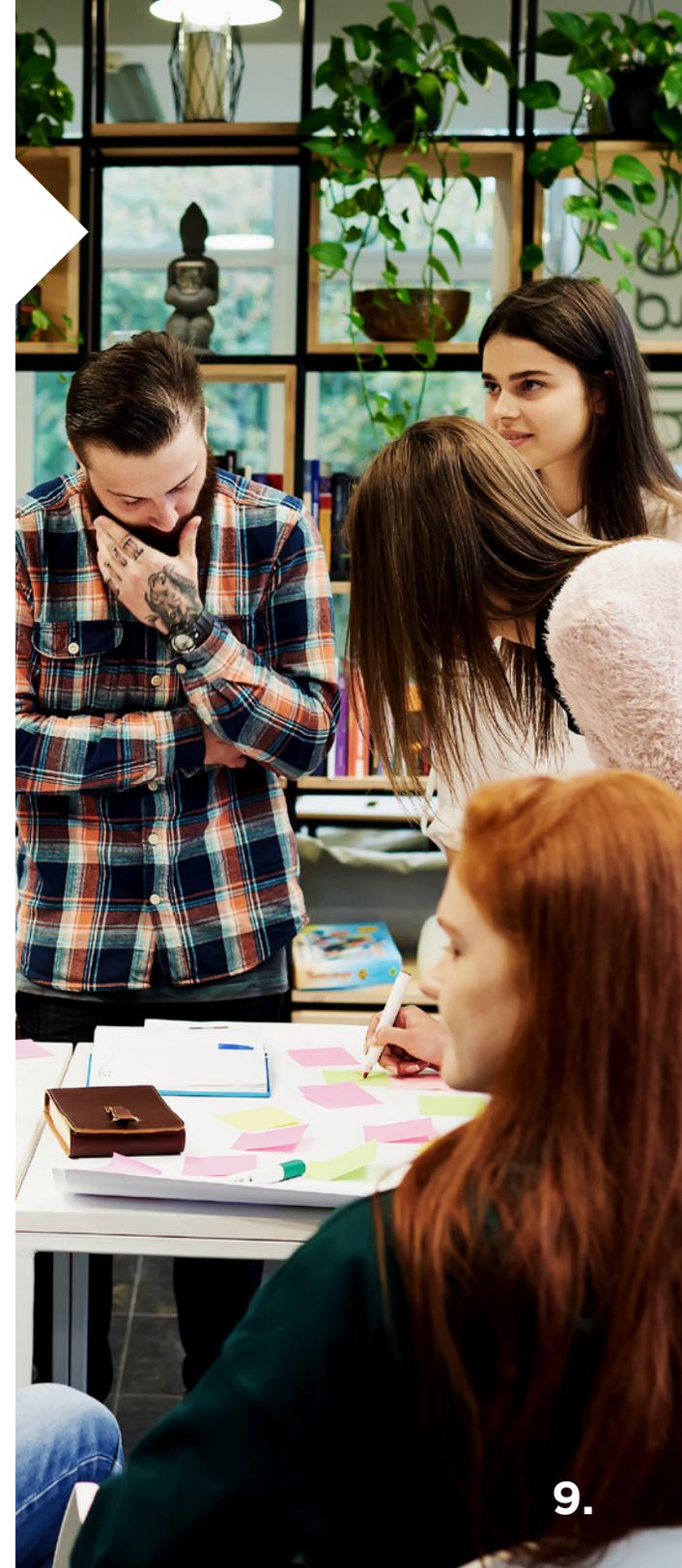
Moderators base the group number off of the following considerations and what works for them based on experience.

**Controlling the group to maintain a productive environment.** Moderators handle group numbers differently when both encouraging and controlling group interaction.

**Hearing all the voices.** It's crucial to hear every group member to get the best insight.

The number of participants in the group is a key part of this equation.

**Minimizing group-speak.** Group-speak (or, even worse, groupthink!) is a negative occurrence in focus groups where there is one strong participant who influences the opinions and reactions of other participants, therefore inhibiting them from expressing dissident opinions. Reducing the size of a group is one way to minimize group-speak, but a good moderator avoids group-speak by quickly building rapport, continually monitoring the room, reading body language, and encouraging expression. It's necessary to keep these considerations in mind as forcing in more participants just to please a client is only going to result in poor quality insight.





# HOW TO CHOOSE A FACILITY LOCATION

**Getting the right participants means getting the location right first. Once the target participant's characteristics have been clearly specified, the right location must be considered to find a match for the qualified participants. The facility's location is the city where the participants live, and the city's characteristics will be a representative of the participant's characteristics.**

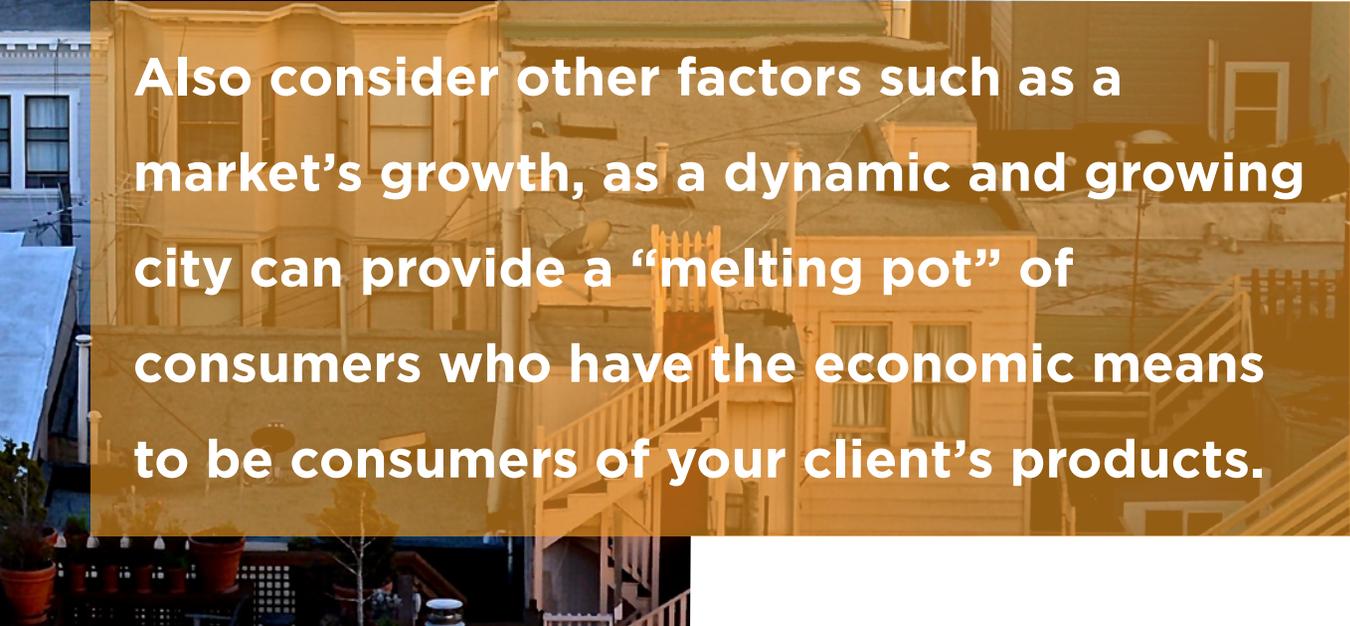
It's always recommended that smaller cities are considered as they frequently offer a

more representative sample of 'typical' consumer behavior.

More broadly, regional differences should be considered. For example, regional climates will produce different demands for air conditioning and different consumer behavior across states.

The actual facility will also host unique features such as differing room sizes and technology available. It's important to consider what is needed for a project to make sure the facility corresponds to those needs. Using facilities run by the same company in multiple cities also offers the benefit of easy coordination and collaboration to save time and effort.

Other factors worth considering are travel time and cost, personal preferences, and proximity to headquarters. However, these factors are not relevant in delivering accurate and quality insight from qualified respondents, so these factors should be treated only as additional criteria.



**Also consider other factors such as a market's growth, as a dynamic and growing city can provide a "melting pot" of consumers who have the economic means to be consumers of your client's products.**

# TECHNOLOGY THAT IS CHANGING THE NATURE OF QUALITATIVE RESEARCH

**Technology continues to make its way into the world of qual, blurring the line between qual and quant. Technology has kept the field of qual competitive to support the high business demands that are increasing the speed of research while simultaneously reducing the price.**

Ensuring a representative sample is the biggest driver for research projects, and technology is beginning to shape up the smaller sample involved in qual projects to compete with the sample sizes in quant. Many of the newer methods are combining the depth of qualitative with the breadth of quantitative – getting us to the ‘how?’, the ‘why?’, and now even the ‘how much?’

There are several ways in which technology is changing the nature of qual. The following innovations should be considered in the research design:

**Scale:** Tools such as text analytics have started to offer qualitative information at the scale of quantitative, with a growing ability to analyze the information. For example, customer service information and social media analytics both provide new structure to their formerly unstructured big data sources. Despite a few minor limitations in some applications, such as sample management and response bias, proven use cases are continuing to expand into consumer needs, brand management, operations, and more.

**Reach:** As the tools a respondent needs to participate in qualitative research turn mobile, and online qual sits in the respondents’ pockets, reaching across borders to access consumers in the appropriate environment becomes much easier.

**Cost:** Online qualitative provides tools such as social media analytics which prove very valuable for only a small cost. Mobile also provides easy “in the moment” access to consumers, which was formerly cost prohibitive using other tools.

**Depth:** The ongoing nature of a community allows a more longitudinal look at consumers and their product issues,



## Online platforms are already giving researchers the opportunity to easily build and launch an entire study in a matter of a few hours.

providing deeper information. Online is also particularly useful in research that involves sensitive topics. The use of video technology, such as high-definition video recording and streaming and 360 degree cameras, has also provided researchers with a much closer look at consumers, making the voice of the consumer truly come to life in a setting where each and every respondent is heard and listened to.

**Speed:** Speed, which is also listed as one of the top challenges for researchers, has improved in almost all qual tools. Once an online community is running, the speed to insight is generally quicker than traditional methods. Although this may be a work in progress, the path to speed is getting nearer. And fast insight means a satisfied client and

more time to focus on the research design and data analysis.

**Accessibility:** Online qualitative platforms such as Aha! offer easy access to respondent-driven insight by putting collaborative projects and tools right at the respondent's fingertips. The studies are engaging and community oriented with customized, collaborative project activities and discussions, ideation, storytelling templates, collage tools, perpetual mapping tools, bulletin boards, video uploads, concept testing, and more, all available online or in a mobile app.

These recent tech advancements, however, only presage the future qual has in store. Text analytics are advancing on a month to

month basis. Automation is influencing the world of qual by automating the process of understanding the emotional connections between consumers and brands through projective techniques. New applications and technologies behind crowd-sourcing are providing deeper insights in a cost-effective and timely manner – and even at the scale of quantitative research. Artificial intelligence has also made its way into qual, with improved tools measuring delivery in hours or days instead of weeks or months. Finally, we will soon begin to see the fusion of measurements such as mobile sensors, purchase behavior, and advertising effectiveness. This puts the depth of qualitative insights in context with behaviors – technology is introducing the holy grail of market research.



# HOW L&E CAN HELP RESEARCHERS

**Unique in the qualitative facilities arena, L&E offers in-house Research Design Engineers to support qualitative research projects. That's their job title, Research Design Engineers, or RDEs, and their purpose is to support clients with the best qualitative research design, methodology, and technologies, for the best insight.**

In addition to the support L&E offers clients, the RDE steps in to provide additional complimentary services to guide clients through the research design process. The role of the RDE is to make sure the beginning stages of the researcher, such as project specifications and screener questions, are suitable to confidently produce the data needed to answer the research question.

The RDE reviews project specifications such as methodology, timings and facility locations to ensure feasibility. They are available to give guidance on the specifications, or offer

alternatives if the project is not feasible. For example, if the client wants to run a focus group but the research topic is sensitive, the RDE will recommend that the client conduct mini groups or IDIs instead. Or, if the target respondents are low incidence, the RDE will recommend that the research is split across multiple locations, or consider different technology platforms that L&E has partnered with to offer consolidated solutions under one roof.

The RDE also reviews project quotes for accuracy to ensure the client is getting the best cost estimate. RDEs often assist clients with screener development as well, or review the screeners for issues prior to launch.

But the Research Design Engineers are only a small fraction of the support offered by L&E. Each L&E project manager works in a strong, collaborative environment to strengthen the

support of every project. Some project managers have thousands of qualitative projects under their belts, so although a client's individual project manager is guaranteed to be top notch, as a group the qualitative expertise is out of this world, supported via communication and collaboration IT systems proprietarily built by L&E for the qualitative research industry.

The RDEs are actually former senior project managers who have had minimum 10 years' experience in qualitative research, with additional training from RIVA and other qualitative training solutions. One of L&E's engineers is even a RIVA certified master moderator.

Overall, L&E invests hundreds of hours each year into ongoing education and training to both our RDEs and our project management team, so you have an informed resource to rely on for all of your qualitative research needs.

# 6 STEPS TO PERFECT QUAL

## SUMMARY

Qualitative research provides input into the key functions of any successful business. But before embarking on the next qualitative research project, make sure you have the expertise to guide you through. The L&E team is here to ensure the success of any project. So follow the guidelines to start out your qualitative journey with the perfect qualitative research design.



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(888) 251-6062

[bidrequest@leresearch.com](mailto:bidrequest@leresearch.com)

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