

Master Crafting

Qualitative Basics

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Exhilarating and Evolving! The past five years of Qualitative Research have been nothing if not fast-paced and ever changing. When you encounter those spirited qualitative practitioners and they say it's an exciting time to be in qualitative research, they mean it. Leaps in technology and blurs in the Qual-Quant paradigm have invited researchers into the most exciting

opportunities alongside our clients. It's easy to

let it all carry you away into a happy land of blissful possibility. In fact, I often now have clients asking me to conduct research using methods that I have worked tirelessly to have others accept over the years. I should be happy. Well, I'm glad to have the door open if the method is, in fact, what I know will yield optimal learning, but in other cases I receive a request for a round peg in a square hole. Bells and whistles don't always mean better. Sometimes I truly need to simply sit one-on-one with a consumer and unpack their story through a very rudimentary dialogue.

The truth is that when things move quickly, the foundational details for insightful learning from the consumer often become fuzzy – and occasionally lost in the shuffle. So, let's hit pause on the lightning-speed evolution of what we do, and talk about how we ensure that what we do is done well.

Understand the business decision at hand

Remember the game of telephone where you whispered a phrase from friend to friend until it was hysterically diluted by the time the last person repeated it out loud? Unfortunately, it's all too often the case that the objectives of a research initiative are articulated and then passed through a series of filters that undoubtedly add their own twist until you end up with a listed objective that sounds about right, but is missing something of value. Whenever possible, ask your clients (internal and external) to tell you about their goals of the research. Nothing replaces hearing from the mouths of your clients about what they need and expect the research to be able to do for their business.

And then there's the unfortunate scenario of a team uncertain of the real objectives themselves. The overall value and effectiveness of the research is completely shaped by the clarity of the objectives, so if the research goals and how the research will

be used are not clear to all parties, the entire team needs to spend some time getting on the same page. Clearly understanding the goals of the research so that you can effectively probe during an interview truly makes or breaks the research.

Get the right people

Anyone who has done qualitative research for any amount of time has more stories than they'd like to share about the interviews or groups they've conducted in which the respondents weren't the "right people." In some instances, the respondents have been blatantly unqualified, but in other cases, the respondent may have fit the profile, technically speaking, but didn't capture the essence of who it was we needed to really learn from. Enter the recruiter. Developing strong relationships with solid recruiters who implement best practices and recruit with integrity is one of the most important determining factors to setting up a project for success. You can create an amazing discussion guide and utilize a dynamic moderator, but if the people in the room don't fit the bill, it's all for nothing.

However, a good recruiter can only do so much if they don't have a strong screener from which to work. It's critical to spend adequate time designing a screener that effectively gets the "right" respondents into the research. At times, the speed of the project launch requires turning around a screener within a couple of hours. I'd argue that we all need to give the screener the attention it deserves, as a slight miswording or omission of any given question may lead us to the wrong respondent who can't teach us what we desire to learn. Take the time to build a screener that works.

Ask the right questions

Understandably, a lot of time is spent on determining the data collection method itself. However, sufficient time is not always taken at that same point to strategically vet *how* the team will elicit feedback from the consumer. So let's refocus, even if only briefly, on a few techniques in which every qualitative researcher should strive to excel. Mastery of these techniques will ensure a qualitative consultant is able to elicit deep learning from respondents, beyond the surface comments of convenience and perhaps even awareness.

While skilled moderators are able to apply a multitude of techniques *at the right occasion*, there are three in which all qualitative practitioners should be well-versed: Nominal Group Techniques, Laddering, and Projective Techniques.

Nominal Group Techniques: Respondents in a group setting are asked to independently write down their responses, opinions, or ideas, and rationale before responses are discussed and captured as a group. This technique helps keep respondents accountable for their personal opinions and can reduce some of the challenges of group influence. Effective qualitative consultants leverage this technique when appropriate, and can use it to gather a wider range of opinions and ideas. It helps to establish a voice for everyone participating in the research, despite individual personality. There is a range of variations of this technique, and the ease of utilizing it in many online settings has presented one strong benefit of online tools.

Laddering: This primarily refers to an in-depth, one-on-one interviewing technique used to develop an understanding of how consumers translate a product's attributes with respect to self. Means-End Chaining, (the basic questioning structure for laddering), focuses on the linkages between the attributes that exist in the products (the "means"), the consequences for the consumer provided by the attributes, and the personal values (the "ends") that the consequences reinforce. Understanding how attributes of a specific brand are personally relevant is the basis for the development of messaging strategies. Now, in English? It's taking face-value responses and going much deeper by digging to find the higher-level need-states that may exist. A woman may say she prefers a spicy cracker, but what if you could find out from her that the reason she really wants it is because the stronger taste makes her eat less, so that she doesn't gain weight, so that she has a better figure, and ultimately feels good about herself? It's a better conversation.

Projective Techniques: This includes a wide range of activities and lines of questioning that offer an indirect way of eliciting learning from the respondent. Through these techniques, the researcher is able to understand the underlying feelings, needs, and opinions, by offering respondents a way to express things that are either uncomfortable to say, or may be less conscious thoughts or decisions. It helps to put the respondents in the moment, or in a situation through which stories and examples can provide context as to why and how someone felt the way they did. These tools allow the respondent to more easily articulate something that they are more familiar with, compared to something very abstract, or nebulous things like a brand, which has many layers or levels. Examples of more commonly used projective tools include: personification exercises, situational drawings, storytelling, scripting activities and collaging.

There are a host of other approaches for which a qualitative practitioner should be familiar, but the techniques covered here are widely applicable across a range of industries and have the potential to deliver powerful learning to the research team.

But know that sometimes the right answer is even simpler than all these specialized tools – ask a question and truly listen to the answer.

Get creative

There is no guarantee in qualitative research except to expect the unexpected. Qualitative projects are completely customized initiatives. A meaningful and fruitful exercise in one group may fall flat in another. We may be testing stimulus in the form of wireframes or prototypes with some groups, and asking other respondents to try on underwear. The craziness is what keeps a lot of us in love with what we do, but it's not for the faint of heart. Be prepared to get creative – come up with creative solutions to strange problems, be willing to try new techniques at a moment's notice, and be creative in how you approach the process, as well as the ways you ask the client team members to contribute to the learning.

Deliver the results in a meaningful way

Now that we have thoughtfully planned and executed solid research, we must turn our attention to delivering it to our clients in a way that has an impact on their business. Consider *form* and *function* when it comes to reporting on qualitative insights. It's not enough to merely tell them what you heard. The power is in the analysis – looking for patterns of similarities, as well as points of dissonance. Where do the client's opportunities really lie? How does the learning from the research have the potential to deeply impact their current or future business? The answer is *insights-driven* reporting. It's taking the face value responses from the research and marrying them with peripheral knowledge of the product, service, or brand, as well as emotional context, to help your clients make sense of it all.

Reports live on to tell the story of our research, long after our foggy memories lose track of things we never thought we'd forget. So, take the time to make a lasting report that tells the story. A report that is: visually appealing so that people will actually want to read it; structured and written in a way that the client culture can really consume; concise enough that upper level management can get the gist with one perusal; and makes that leap from insight to action by providing recommendations for the clients. Never underestimate the power of an effective and meaningful report.

To be a true partner for your client, you must provide guidance in navigating these projects with excellence in each step of the process. So, make sure you clearly understand the research goals, help identify and recruit the right people, truly consult about the questioning techniques used to elicit rich learning, offer creativity to the process, and deliver impactful and meaningful reports. Do these well and your client won't be able to let you go.

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