

## Staged Online Research: Independent Journaling Before Online Discussion Boards

### Getting Deeper Insights, Faster

Qualitative research is an effective tool for discovering the emotional connections among products, brands, and consumers. *Online* qualitative research, however, has been called a poor sister to traditional face-to-face research, as the subtleties of nonverbal communication are lost. Yet the strength of the written word—the depth and introspection of a letter or journal compared with a conversation—can make the output of online research a powerful alternative to the focus group, a different window into the soul of a respondent.

**Planet** May 5, 2005 15:57:46 [ [Reply](#) ]



First I would mention how thought provoking the forum was and describe how each person had a different symbol. Secondly I would tell them about the questions and how everyone had different view points and answers to the questions. I would go on to explain that after reading these responses, I would often think differently about the question and how interesting it was to see other view points. It may be difficult, but I would say how my emotions 🤔😬😬 were brought into it and much I reacted to the questions because the forum really caused me to take a good look into myself.

We have found real success using intensive pre-work prior to a group discussion board—essentially two stages of research. In our most-recent case, each participant maintained a 4-day journal of behaviors and emotions, followed by a 3-day group discussion board. As the discussion board commenced, participants shared their learning from the journals, exclaiming about similar and different experiences among them. The shared journaling quickly opened the door to rich discussion over subsequent days and to personal enjoyment that, for some, was worth the time spent regardless of compensation. Over several days, one group shared a birthday and the hospitalization of a parent—supporting each other with words of celebration and concern as well as virtual cake and flowers.

**Fish** May 6, 2005 08:00:40 [ [Reply](#) ]



I'd say it was a chance to engage in a discussion on-line with a group of "safe" people answering various thought provoking questions around a broad topic. After a while, you begin to feel like you know certain of the people by their responses. Also you get to engage in follow-up discussions with whomever you want if they say something that strikes your fancy. You find that as the day progresses you learn a lot from other people and you tend to want to keep going back to see what the latest buzz is. It's fun when someone likes what you have said, or wants more info.

Online research—whether pre-work-journaling or the group discussion board—offers the unusual opportunity to send the participant out to their world and then have them return to tell you about it a number of times a day. Moments can be captured the day they happen, rather than recalled later. Shopping or pantry checks can be shared immediately. Busy people can give their thoughts when convenient, rather than at a particular time and place. Moments of pain or anger or joy can be shared in relative anonymity, identified by a first name or pseudonym.

To harness the power of online research, the moderator is the guide, the coach, the cheerleader, and the one taking attendance—for the pre-work as well as the discussion board. Participants are anxious, wondering if they are doing things correctly, looking for the check-ins of the moderator to acknowledge their efforts, redirect as necessary, and encourage their progress. And there are always those wondering if you notice their absence.

### Also in this issue...

- Accessing consumer emotions
- Meeting management techniques
- Articulating the unconscious

As with homework for traditional groups, there are important aspects to consider for an online assignment:

- For online research to be successful, participants must *want* to check in—to see what’s happened or make entries in the journal. The pre-work or discussion board questions need to be inviting, visually enticing for the participant, and easily understood. There is little opportunity to reframe a question because participants log off with no intention of revisiting what has been completed.
- The moderator needs to be a trusted companion along the way, particularly for the independent portion of the research. As a *real person* caring about the respondent and their questions, the moderator sustains the respondents while they complete their tasks, validating and directing their efforts.
- As with face-to-face work, learnings from the pre-work stage are acknowledged and discussed, recognizing the effort of each participant. In addition, participant compensation reflects the total effort for all parts of the research.
- Selective use of incentives or prizes, if consistent in theme with the topic, can help maintain energy and involvement throughout the duration of the project. The most powerful incentive is the fun of participation. Yet, a lottery or product prize among those participating *on schedule* can motivate participants to keep the project top of mind. This level of involvement is key because a participant who keeps up with the questions has time to discuss and explore ideas with other participants, compared with someone doing 2-days worth of entries at once.
- The discussion board web platform used should have a vehicle for quickly capturing attendance/participation, giving the moderator the information needed to understand who has yet to participate, as well as facilitating the award of any prize or incentive.
- As participants log in, complete the independent pre-work/journal, then logout; regular personal e-mails are vital communication to acknowledge and support their efforts. The e-mailing capability of a discussion board platform is critical to the care and feeding of online respondents, especially in a solo phase of the project.



So don't be afraid of the online environment—jump in and experience the depth that comes when participants feel free to share their thoughts and feelings from the privacy and sometimes anonymity of their computers. And let pre-work or journaling “prime the pump”—building shared experiences and community before the discussion starts.

—Trish Lenahan

## Primary Insights Introduces Immersion

In order to truly tap into consumers’ emotions about a product, service, or brand, it is important



to understand how respondents are feeling when *using* the product or service—that is, to penetrate their life in the moment of *interaction*.

Primary Insights introduces *Immersion*—a process for allowing a deeper glimpse into the life of respondents. It benefits from self-discovery, the “ah-ha” that consumers experience when armed with the tools to tap into their emotions and feelings.

The result is a rich source of stimuli from which to glean key insights. Primary Insights has used Immersion to capture key insights around...

- ... emotional and physical needs related to parenting.
- ... protection concerns in hospitals.
- ... emotional reactions to physical comfort in baby products.
- ... nutritional attitudes and behaviors surrounding breakfast.
- ... children's attitudes regarding health and wellness.

Immersion takes planning and creative tools. After respondents are recruited, they are sent pre-session working materials suitable for the project. Materials might include journals, cameras, stickers, word lists, and writing materials. For a period of time before the study, respondents capture their needs, thoughts, and feelings during daily events of interest. They may take pictorial journals or use stickers to reflect emotions. They may be asked to complete collages or a “*timeline of emotions*.” This rich, creative fodder serves as the foundation for group, in-depth, or on-line discussion.



Immersion enriches research in that it touches on findings and emotions that are typically difficult for respondents to recall. It has benefits unique from observational interviews in that it focuses on respondent self-discovery. Researchers and clients are able to tap into the respondents’ world, through the respondents’ lens and with their conclusions. In this way, it adds color and texture to the rich fabric of qualitative techniques.

—Linda Binder

# Managing Meaningful Meetings

It's likely you've had the opportunity to facilitate a meeting as part of a corporate, community, religious, or personal experience. It's also likely your discussions have been sidetracked by an attendee or two—someone monopolized the conversation, another struggled to find the right words to explain a viewpoint, one person was reticent to get involved, and another loudly rejected every thought and idea proposed.

What an experience! You may have been tempted to throw something at these characters, yet there are better and more effective ways to manage meeting goers who present such challenges.

The fundamentals of meeting facilitation are similar to those of qualitative research projects. We all aim to effectively and efficiently achieve a given set of objectives within a finite period of time. Qualitative researchers make a livelihood managing groups of people in quest of this goal. One of our basic tenets is to make all participants feel appreciated and acknowledged, safe and secure during such sessions. This is often referred to as having **unconditional positive regard (UPR)** for all attendees despite their idiosyncrasies.

Keeping in mind our principle of UPR, here is a tongue-in-cheek look at some of the taxing folks you may have encountered in your meetings along with methods for effectively working with them in the future.

The **Jabber Jaws** is an overly talkative participant who may be an *eager beaver*, exceptionally well informed and keen on showing it, or just naturally wordy. It's difficult to maintain UPR for such a person when the clock is ticking and he won't let anyone else get in a word. Still, you may need his traits later on, so be patient and avoid embarrassment or sarcasm. Consider the following:

- Interrupt him with *"That's an interesting point. Now, let's find out what the group thinks of it."*
- Tactfully control him by refraining from eye contact and directly addressing questions to others.
- Thank him and suggest, *"Let's put the others to work,"* or *"How about allowing others to respond first."*
- Let the group take care of him as much as possible.

The **Fighter** may have a combative personality or might be normally good-natured but upset by personal or professional problems. Keep your own temper firmly in check and prevent the group from getting excited. Try to find merit in one of her points by expressing your

agreement—or get the group to do so—then move on. When she makes an obvious misstatement, toss it to the group and let them turn it down. As a last resort, talk to her privately if the opportunity presents itself. Attempt to find out what's bothering her, and discover if you can win her cooperation for the duration of the time you are together.

The **Rambler** talks about everything except the subject, may use farfetched analogies, and often gets lost. Thank him when he stops for a breath, refocus his

attention by restating the relevant points, and then move ahead. Another option is acknowledging his point and, in a friendly manner, indicating, *"We are a bit off subject."* An obvious glance at your watch might also work.

It is possible some sessions will include the **Clashers**. Personality conflicts are unproductive as they are likely to divide your group into factions. As a meeting facilitator, consider the following:

- Emphasize points of agreement and minimize points of disagreement, if possible.
- Draw attention to objectives, and ask a direct question on topic.
- Bring another member into the discussion.
- Remind participants about the importance of respecting different opinions, and reinforce the learning that comes from such diverse perspectives.

The **Griper** has a pet peeve or a legitimate complaint you might want to acknowledge before proceeding to other points of conversation. Sometimes all she needs is to feel heard before she's able to let go and move on. It is also helpful when another member of the group answers her. If other approaches do not work, offer to privately discuss the problem in more detail after the meeting is over.

The **Fog Master** has difficulty putting thoughts into words and may need help. The effective facilitator will twist his words as little as possible, and will restate them to make sense. Avoid saying, *"What you mean is this."* Rather, say, *"Let me paraphrase what you said to be sure I fully understand."*

You've probably experienced the **Distracters** during group sessions. They start up a side conversation that might be related to the subject or off-topic. In either event, it is disconcerting to the facilitator and other members.

The following guidelines may help bring these conversationalists back to the main topic of discussion:

- Do not embarrass these participants.
- Call one by name, and ask him an easy question.



- Call one by name, then restate the last remark made by the group, and ask her opinion of it.
- If you are in the habit of moving around the room, inconspicuously walk over and stand casually behind the members who are talking.



- Arouse this person by asking her opinion.
- Draw out the one next to her, then ask the quiet participant to tell the person who has just finished sharing what she thinks of that expressed view.
- If she is seated near you, ask her opinion so she'll feel she is talking to you, not the group.

When you're next observing a masterful facilitator at work, you'll recognize some of these techniques being used to achieve meaningful results. You may want to try some of the methods the next time it's your turn to lead a group discussion with specific objectives and a finite timeframe. You never know when a Rambler or Zipped-Lip is lying in wait.

—Patt Karubus

What do you do when someone does not participate due to boredom, indifference, timidity, or a sense of superiority? Your action will depend on what is motivating this **Zipped-Lip**. Think about the following:

## Tapping the 95

All around us we are being told unconscious thought pretty much runs our lives, reactions, and beliefs. The numbers being quoted say the unconscious mind manages 95% of our thinking. We process, interpret, evaluate, and respond to information through our adaptive unconscious. This causes some to question the value of qualitative research.

There is also the perspective that decisions are made in the blink of an eye, without any evident thought whatsoever. This perspective proposes that traditional qualitative research is a morass of manufactured responses offered just to try to help the misguided researcher.

These discoveries are actually great news for qualitative research. They enhance rather than undermine the value of *innovative* exploratory qualitative research.

We at Primary Insights are excited about enhancements to qualitative research resulting from scientific discovery about how the brain works. The research challenges us to extend our development and use of metaphorical methods and to create additional ways of helping consumers discover and display their invisible/unconscious thinking. It underlines our commitment to helping our clients build their own intuition and get closer to their own metaphorical systems—to finely tune their observational skills and confidence in their decisions.

We believe in the role of emotion in branding and the deep-seated, complex nature of our associations and memories. We believe in the concept of metaphorical thought and thinly sliced decision making—what we talk about as “intuition” or “gut”—and have based years of work on belief in these perspectives. We have been developing, applying, and using a variety of approaches to

discovery and application of metaphor for the past 18 years. Metaphor is consciously included as appropriate within studies and in our reports.



The question I have is, if qualitative methods are suspect due to limited access to thinking—whether the 5% or the blink—why would anyone do any quantitative research at all, let alone qualitative? This is not a challenge to the value of quantitative. It is simply accepting that much of our thinking takes place in our unconscious minds and wondering why we would assume people cannot access the information and translate it accurately in conversation?

This much I know. It is important to question and exciting to continuously create and develop new means of discovery. And it is fun to be challenged.

—Elaine Parkerson

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