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All together now: How client participation can enrich research

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Traditionally, market research vendors and clients have been responsible for very specific portions of a study - their work rarely overlapping. The client formulates the objectives (and often the preferred methodology), and then the vendor takes over, conducting the research and delivering a report. For many studies, this format successfully delivers on the business objectives. But when you are aiming for a deep understanding of the consumer experience, this model presents some barriers, which can be overcome by modifying these traditional roles and forming a more collaborative relationship between researcher and client.

Barrier No. 1: Client experience vs. vendor experience

The experience of the observers behind the glass versus the researcher in front of the respondent(s) is vastly different. Even if the client carefully observes each interview, their impression of the research can differ greatly from the impression of the moderator.

The vendor spends hour after hour speaking directly with the respondents; nonverbal cues are visible to the observers, but they are experienced as the give and take of conversation by the emotionally-engaged moderator and respondent. Often, one or two members of the client team are responsible for communicating the entirety of the consumer experience to the internal client.

As one of my clients told me, "Research is so often just a bunch of words on a page; it can be hard to

connect with." Connection to the research is what transforms a report into a strategy and makes market research valuable.

Barrier No. 2: Meeting the expectations of the internal client

Caught up in the details of recruiting and field work, vendors rarely have time to look beyond their direct client's needs to consider the basis of the project. It can be easy to lose track of the real purpose of the research: providing an internal decision maker with valuable information. Studies often take weeks and require frequent communication between many parties. If the internal client is not directly involved with the research, the final product may look much different than they originally envisioned, while the client who has been out in the field is satisfied with the results. An involved client team can act as a direct line of communication between the research team and the internal client, ensuring that the project stays on track.

Barrier No. 3: Industry knowledge

Finally, the analysis and report-writing process are primarily performed by the vendor, who may be very knowledgeable about the findings of a specific study, but it's the client who has more intimate knowledge of the business issues currently facing the organization.

Overcome these obstacles

How do vendors overcome these obstacles to capture the true consumer experience and deliver findings relevant to clients' business objectives? How do clients form a connection to the research and communicate it to their internal clients? The answers lie in close collabora-

tion throughout the research process, which encourages input from both client and vendor. A well-developed, transparent process, along with defined roles, is vital for this type of relationship to exist. The vendor as the guide provides expertise in methodology and analysis. From the creation of the field materials to recruiting, interviewing and final analysis, a well-honed process makes the difference between obvious findings and true insights. This especially rings true in the more labor-intensive and emerging methodologies such as ethnography and multimedia online research.

Starts with a discussion

Close collaboration between vendor and client starts with a discussion of the project objectives. It is the vendor's responsibility to understand the history behind the stated objectives of the research. Both client and vendor should be prepared to look at the goals of the study critically to identify the true challenges faced by the client's organization. Vendor and client should discuss the proposed methodology and weigh its merits against alternatives, which might yield better results based on the project objectives.

Selecting the proper research team can increase the ownership the client feels over the research. Many times the people with the most technical and strategic knowledge (engineers, salespeople, marketers, etc.) are rarely directly involved in the research. Building a cross-functional team composed of these professionals provides a more diverse set of experiences through which the findings can be filtered.

This team works directly with the vendor team, taking part in all aspects of the fieldwork. It can be difficult at first, especially when conducting in-home visits. As one client put it, "You take a salesperson that has no problem giving a presentation in front of 500 people, and you sit him down in a living room with a 50-year-old woman, he is scared to death." Because the experience is so unfamiliar, the team is more apt to pay attention and retain the details of the visit.

When working with a team that is not accustomed to - nor trained in - market research, it is always a good idea to conduct some training before entering the field. Depending on the methodology and the research experience of the participants, this training can be as simple as a one-hour phone call to discuss the logistics of the fieldwork or as intense as a two-day ethnography training session that covers everything from the history of the methodology through the etiquette of respondent interaction.

Room for increased involvement

With certain methodologies, there is not much room for increased involvement while conducting the research. It would not be advisable to have the client sit next to the moderator during a focus group or IDI. These environments are too controlled to allow much beyond the current practices. Non-traditional methodologies like

ethnography and qualitative online studies offer the most potential for expansion of the client role while in the field.

We encourage our client team to join us on ethnographic studies, participating in the visits. The role of the client team on site is to observe and take notes, fully immersing themselves in the consumer experience. It is important to make it very clear to both the research team and the respondent that the moderator will be leading the interview and that there will be time for questions from the other team members at the end of the visit. This helps to maintain the consistency of the research and the rapport between moderator and respondent. Firsthand experience with the consumer leaves a lasting impression and the research is not remembered simply as words on a page but as a unique event. The consumer now has a name, a family and the same everyday concerns as the client.

With qualitative online research, the benefit lies in the client's ability to view and interact with the material at their convenience and in a variety of ways. Text- and multimedia-based responses allow the entire research team, client and vendor to work together viewing and discussing the research as it takes place.

Online research brings collaborative analysis to a new level with a host of tools for categorizing and manipulating the data. This is where client participation can add real value to a study. At the most basic level, clients can post their thoughts and questions in virtual "back rooms" - notes which appear connected to a respondent's submission but are only visible to the research team. Comments and responses can be tagged and rated as well, building a conceptual network that helps highlight themes during the analysis. All of the media posted to an online discussion board can be downloaded in a number of formats to be shared with stakeholders during or after the research.

Backroom comments, tags and ratings can be used by the vendor team to probe for relevant information and guide the analysis process. The industry expertise of the client team is integrated in real time into the study, not simply accessed during the initial planning and intermediate debrief stages.

When working with any methodology, frequent debrief sessions are a great way to draw on the client's industry knowledge and increase participation. Post-interview debrief sessions can quickly degenerate into conversations about personal biases or pet ideas. For this reason, a structured debrief process helps draw the most from the research and maintains consistency in data collection throughout the fieldwork. In our process, the debrief takes the format of a guided conversation and all thoughts are recorded. Both client and vendor contribute equally to the data collection.

Sets the foundation

A good process is just as important during the analysis as it is during the research. It sets the foundation and allows

the clients to simply follow along, filling in information they feel is important, while the vendor facilitators guide them from superficial observations to a holistic understanding of the consumer experience. The client team uses the data collected during fieldwork to build themes and concepts, while the vendor shapes and guides the conversation. Using this model, the entire research team begins by organizing the raw data that is then used to identify themes from which consumer needs or areas of opportunity are developed. During each phase of the analysis, the vendor team uses various techniques to connect the increasingly-abstract concepts back to hard data collected during the research.

Intimate knowledge of the specific products or area being researched is necessary to separate the valuable insights from the merely interesting. Briefings, research and previous studies can give researchers a good base, but these cannot match the experience of someone who spends every day contemplating the minutiae of a prod-

uct design or business strategy. This experience changes the client's interpretation of the conversation and allows them to identify the information most important to their industry - details a researcher might not immediately recognize. It is standard to have clients view interviews and focus groups, probing and asking questions, but their knowledge is often underutilized when it comes to the analysis of the findings. Combining these two areas of expertise (process and content) leads to a level of preparation and understanding that neither client nor vendor possesses individually.

Discover the real value

Taking a more collaborative approach can help vendors and clients alike discover the real value in their offerings. Working with clients as a unified research team allows the project to move past entrenched company biases to produce a quality of research that neither team could accomplish alone. | [Q](#)