

## Views/Alert Bridges

### The Day of the Research: Creating Great Partnerships between Qualitative Research Consultants and the Research Facility

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(Editor's note: The following article will also appear in the June issue of Alert, as part of the ongoing Bridges exchange between QRCA and MRA).



Many hours go into planning and preparing for a qualitative research project, by both the qualitative research consultant and the research facility. Many factors occurring the day the research is conducted either will contribute to the success and overall ease and pleasantness of the day or will have the opposite effect.

In an ongoing effort to increase the quality and efficiency of the research process, and to enhance the relationship between qualitative research consultants and the research facility, the QRCA Field Committee and MRA are producing a series of articles. The subject of these articles is how to create great partnerships between consultants and the people who make their work possible by bringing together the research respondents, that is, the research facility.

In true "partnership" style, qualitative research consultants and research facility personnel have joined together to author these articles.

The series will cover the following subjects:

- The Role of the QA (Qualitative Assistant) in the Qualitative Research Process
- A Good Day at the Research Facility: the Role of the Qualitative Research Consultant
- Creating Great Relationships between the Qualitative Research Consultant and the QA

The following is the second article in this series.

#### **A Good Day at the Research Facility: The Role of the Qualitative Research Consultant**

##### **Introduction**

When the qualitative research consultant considers research facility staff to be "partners" on his/her team, the day of the research will run more smoothly and productively.

Both the facility and the consultant play roles in guaranteeing a successful research day.

This article discusses how the consultant can be a "good partner." \*

It includes the following topics:

- A Good Research Day Begins Prior to the Research Day
- First Things First: Arriving at the Research Facility
- Inquiring Minds Want to Know
- At the End of the Day ...
- Don't Overstay Your Welcome
- Miscellaneous Issues

\* It is highly recommended that consultants also review Section D in the QRCA Code of Ethics, "Field Relationships: Recommended Practices."

#### **A Good Research Day Begins Prior to the Research Day**

To help ensure a smooth, productive research day, the qualitative research consultant needs to take certain actions **prior to** the day of the research.

Specifically, the consultant must make certain that he/she:

- communicates clearly regarding what is expected of the research facility
- provides sufficient time for the facility to meet these expectations when communicating key information

*Recruiting Issues:* Needless to say, the research facility can only recruit the "correct" respondents if they:

- understand what characteristics determine a "correct" respondent
- are given adequate time to recruit those individuals

Consultants should provide specifications or screeners, or both, **in writing**. Also, this information should include the date of the research, start times, and number of people the consultant wants to show. If the consultant phones the facility with these details, he/she should

follow up with written confirmation.

When these very important elements are in written format, the likelihood of communication errors is reduced. Research facilities also appreciate having a written checklist of respondent specifications included at the end of the screener. However, the screener should contain all necessary information, including the termination points.

Although the research industry continually is asked to complete projects in less and less time, the industry still considers two weeks recruiting time to be standard. More time may be required for particularly difficult recruits.

In order to provide adequate recruiting time, a consultant may send a screener or specifications before absolutely finalized. Please note that changes to the screener after recruiting has begun can be costly and slows the recruiting process. Although changes sometimes are unavoidable, every effort should be made to provide the research facility with the final version prior to the start of recruiting.

If changes to the screener are made after recruiting has started, the consultant should inform the research facility of the changes, rather than just sending a new screener.

If the final respondent specifications differ from the initial specifications on which the research facility's quote was based, and the changes result in a different incidence, the research facility may need to adjust its quote.

Research facilities typically send recruiting reports at various intervals during the recruiting process, outlining key information about each respondent

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recruited to date. Consultants should indicate what information they need to have in their reports, as this may differ from what the research facility thinks is needed. It also is extremely important for consultants to review recruiting reports promptly, and immediately contact the facility about any problems or concerns.

Consultants should promptly return calls from the research facility. Promptness is particularly important when the calls are about problems or concerns relative to recruiting. By being responsive, the consultant helps the facility undertake any necessary corrective measures and becomes a “good partner” by helping ensure that the “right” number and type of respondents are recruited.

*Equipment and Technology Requests:* Being a good partner requires that the consultant communicate clearly about other details. One very important area is equipment and technology requests.

Research facilities want to keep pace with the ever-increasing impact of technology on the market research industry. Most facilities will provide high tech equipment and Internet access in the focus group room, in addition to VCRs, projectors and screens, upon request of the consultant. However, because of the complexity of high tech equipment, it is extremely important to communicate specific technology-related needs, as well as all other equipment needs, **in writing**. This helps to ensure that the correct equipment will be in place when the consultant arrives at the facility. This is no time for surprises!

Also, as costs can be considerable, it is recommended that the consultant understand and sign off on equipment costs prior to the sessions.

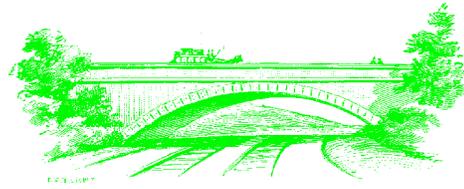
Similar to the recommendations for high tech needs, it is prudent for the consultant to provide a **written request** for operator-assisted video taping.

Consultants should communicate these needs to the facility as soon as they know them, in order to give the facility adequate time to order equipment and

book a videographer. A minimum of three days’ notice is suggested.

*Other Issues:* In addition, consultants are urged to alert the research facility in writing about the following with as much “lead time” as possible:

- product purchases or other shopping that requires a staff member to leave the facility. With advance notice, the facility can make certain that the office is properly staffed to meet the needs of all consultants doing business in the facility that day.
- instructions for re-screening respondents. Does the consultant want the respondents to be re-screened? If so, will he/she provide a re-screener, or will the facility be asked to prepare one? Will the respondents complete the re-screener themselves, or will the facility staff administer it?
- if the facility prepares a re-screener, the consultant will need to 1) specify in advance which questions are to be included, and 2) approve the re-screener prior to use
- regardless of who prepares the re-screener, the consultant should ensure that the re-screener’s specifications for qualifying do not differ from the screener
- whether the consultant will arrive with an unusually large amount of typing or photocopying. Research facilities typically are prepared to provide light typing and some photocopying, but may be better able to meet more time-demanding needs if given a “heads up.” Sometimes, the consultant is not aware of this need until shortly before the groups or interviews. Even in these instances, a quick telephone call prior to arrival at the facility will help ensure that this request is honored quickly and smoothly
- similarly, if the consultant and clients expect to require a particularly large amount of time



and attention from the QA, such as for extra typing or other help, the research facility can better meet that need if it knows this in advance.

The facility may recommend that a second QA be provided

Other information that helps the facility provide good, hospitable service includes:

- special room set-up instructions
- number of clients expected to attend
- client food requests
- consultant food requests (i.e., time served and specific food needs) if different from those of the clients

### First Things First: Arriving at the Research Facility

Research facilities typically plan for the qualitative research consultant, as well as his/her clients, to arrive no earlier than one and a half hours before their groups or interviews are scheduled to begin.

If the consultant and/or clients wish to arrive earlier than this, it is courteous to ask the facility if this is agreeable. This shows respect for other consultants who may be working at the facility at this time, as well as for the research facility staff. Also, the consultant benefits directly — the facility will be better able to meet the consultant’s needs if his/her arrival time is known in advance.

If the consultant arrives too near to the group or interview start-time, there may not be adequate time for last-minute details to be handled. Whenever travel schedules permit, the consultant should arrive early enough to allow the research facility to tend to last-minute requests.

If the consultant sees that he/she is running late, it is recommended that he/she call the facility with a “heads up,” and also give any last-minute instructions and answer any questions the

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facility may have.

### Inquiring Minds Want to Know

In order to best serve the qualitative research consultant while he/she is at the facility, the QA and other research facility staff need a few minutes to talk with the consultant upon the his/her arrival. They want to know:

- whether the consultant has any unanticipated, last-minute need for the research facility staff to do typing or photocopying
- desired time(s) for food to be served to clients
- when the consultant wishes to eat
- how many focus group respondents the consultant wants to seat
- “pay and send” instructions: how long the consultant wants any respondents not taken into the group to be held in the waiting room (in case the consultant decides to use them after starting the group)
- what, if any, travel arrangements will be needed (taxi or limo to the hotel or airport, driving directions, etc.)
- arrangements for shipping tapes, screeners, stimulus materials, products, etc.

### At the End of the Day ...

After the groups or interviews are completed, the consultant should be prepared to:

- sign for the audio tapes and video tapes before taking them, if the facility uses this procedure
- make any last-minute arrangements for shipping materials
- provide feedback about the recruiting. Facilities want to know about any problem respondents, so they can remove those individuals from their data banks

Also, a good partner remembers to thank the QA and any other research facility staff.

### Don't Overstay Your Welcome

Just as research facilities expect that

clients will not come “too early” without advance notice, they also expect that the consultant and clients will leave the facility within about an hour following the last group or interview.

If the consultant knows in advance that he/she and the clients wish to stay later to debrief or plan for the next round of sessions, it is appropriate to make arrangements to do so, in advance. If the consultant finds that the post-group meeting is running longer than expected, a good partner will ask the QA if it is all right if the meeting continues.

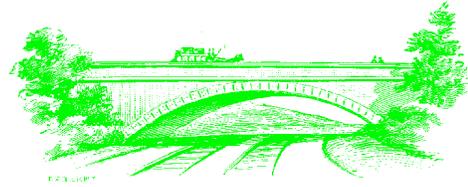
### Miscellaneous Issues

*Honoring Confidentiality:* The research facility is responsible for assuring client confidentiality — for the consultant's project as well as for all other projects the facility handles. Therefore, the consultant and clients are asked to restrict their movements to their lounge and viewing room, and not to wander around the facility.

*Protecting Client Confidentiality:* The consultant should caution clients that they should not announce the name of their company when they sign in with the receptionist upon arriving at the research facility. Respondents may be within earshot. In some cases, the research can be seriously compromised if the respondents learn the name of the company that is sponsoring the research.

Similarly, clients should not state that they “are there to watch the focus groups.” Rather, they should give the name of the consultant, or say that they are there to meet with the moderator.

*Protecting Respondent Confidentiality:* If the respondents were recruited from the research facility's data base, the consultants should not recontact the respondents following the focus groups or allow the clients to recontact them without permission of both the research facility and the respondents. Respondents recruited from the client's lists also should not be recontacted without permission of the respondents.



*Respect the Premises:* The viewing room, as well as all areas of the research facility that the consultants and clients have access to, should be treated with respect. Attendees should treat this space as they would a room in their own home, using reasonable care not to soil or otherwise damage the room and its furnishings.

As partners of the research facility, consultants will set a good example and discourage any unprofessional conduct by their clients.

Similarly, consultants and their clients should ask to use equipment owned by the facility that is not specifically provided for the project. Facility staff will be pleased to help.

*A Word on Attitudes:* As good research partners, consultants will treat the research facility staff with respect and courtesy at all times. Although they may be feeling stress from long days, travel frustrations, client demands, and the high visibility nature of their jobs, consultants are encouraged to always be pleasant and polite.

They should expect the same respect and courtesy from the research facility staff.

If dissatisfied with the performance of the QA or another member of the facility staff, a good partner acts calmly and professionally, and does not embarrass the individual in front of clients or other facility staff. The appropriate tact is talking privately with a supervisor.

A comprehensive discussion of attitudes will be featured in the next article in this series.

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