

Gather 'Round the Campfire!



*I once heard a historian remark that **maps are like campfires**: everybody gathers around them because they bring simplicity to the complex, and show us how to get where we're going.*

Regardless of the type of qualitative research being conducted, the document called 'the guide' is the roadmap for how that research will be executed. Depending on the specific methodology, it goes by different names: moderator's guide, discussion guide, topic guide, interview guide, activity guide, and so forth. No matter, the same principles apply. There are several fundamental principles that must be understood in order to create an effective guide:

The guide must allow key topics to surface organically. I once conducted research for a new brand in an existing medication category that wanted to address the problem of needing water when taking tablets. The ad agency proposed starting the focus groups with the advertising prototypes created for the research, with no time spent discussing the participants' category experiences and attitudes. The research team pushed back, believing that some initial discussion around category pain points could be enlightening. Fortunately, that's what we did, because the big finding from that part of the discussion was that needing water never came up on its own. When I finally prompted for it most participants agreed it was a bit of an issue, but that was as far as they were willing to go. Ultimately, the client realized that their upcoming marketing program was oriented around a problem that barely existed, and they were able to revise their approach.

The point is that when and how discussion points arise can be some of the most valuable learning gained from qualitative. So it's good practice to allow things to come up on their own whenever

possible. This will allow you to observe when something arose, whether it did so with or without prompting, and, if unprompted, what led to the topic arising. What vocabulary did the participants use when bringing it up? If it had to be brought up by the moderator, do the participants have any thoughts as to why? Clearly identifying topics in the guide that will not be prompted will allow these conversations to happen, leading to key insights.

A guide is not a list of questions to be asked. In fact, many experienced qualitative researchers barely consult the guide when conducting research. That doesn't mean that the guide serves no purpose. Rather, it means that the guide's actual purpose is quite different from what the uninitiated might think. The purpose isn't to remind the researcher what to ask. It is to serve as a framework for facilitating a dialogue among all the stakeholders in the research. In fact, as much of the value in a discussion guide lies in its creation as in its use. By working together to create the guide, the research team will have an opportunity to detail and refine the objectives of the research and determine together how those objectives will be achieved.

The research objectives are your north star. They should be stated at the top of the guide document, and every question, discussion point and exercise contained in the guide must clearly tie back to at least one objective. If there's anything in the guide that can't be directly linked to a research objective, that's a red flag. The surest way to overload your guide is to stuff it full of content unrelated to the purpose of your research.

You must verify the timing of the discussion in advance. The most common mistake I see with discussion guides is trying to fit too much in. It's easy to find yourself in the 'ten pounds of potatoes in a five pound sack' dilemma if you don't time your guide out. So run through it with somebody. This takes time, but it's worth it. If possible, do this with your client. That's the most effective way I know of to help them see that the guide might be overfull.

The moderator should ideally write the guide. There seems to be a growing trend of clients writing discussion guides and handing them to researchers. To somebody who is not a qualitative researcher or who does not have a lot of experience as a consumer of qualitative, it might seem like a good idea to write the guide for the moderator. After all, you know your business and your research needs better than anybody, so who better than you to write the guide? And you will be doing the moderator a favor by saving him some work. But there's a crucial reason to let the moderator do this job. Writing guides is what qualitative researchers do. The researcher you have hired has probably written hundreds of discussion guides and can draw on vast experience exploring similar issues. You might know your business better than anybody, but the moderator knows qualitative research in the way that only a professional can. There are many different approaches to conversation structure that a moderator can employ and broad variety of exercises and questioning techniques upon which a moderator can draw. So, letting the moderator take the lead in writing the guide will help you get maximum value for what you're paying.

The guide must be created collaboratively. The purpose of market research is to mitigate business risk and to guide decisions. To do that effectively, all stakeholders must be involved in designing that research. This could include internal and external researchers, the brand team, R&D, various creative agencies and senior management. All stakeholders must fully buy into the research objectives and approach, meaning they must have input into the guide. The creation of a guide is often an iterative process in which the researcher gains understanding while clients are able to focus and refine their thinking. Sometimes clients go into research with a fairly good idea of what they want to do, but it's not fully fleshed out. There's nothing wrong with that, but the process of collaborating with the moderator to write the guide is the perfect opportunity to figure all that out. The irony here is that, if this process is fully collaborative, by the time the research arrives, everybody knows the guide so well that nobody, client or moderator, needs to look at it very much.

The guide must be adaptable. As researchers have been saying since the beginning of time, 'it's a guide, not a script.' This means more than simply that the moderator isn't going to read every question exactly as written, and in the order presented. While the guide must include all of the issues to be explored and provide a rough plan for how that will be accomplished, it must also allow for a good deal of flexibility. Topics will not necessarily come up in the expected order, some questions will fall flat or confuse the participants, some exercises will not be successful and unexpectedly interesting new topics might surface. Therefore, the guide should provide a variety of potential approaches for the discussion, not all of which might be used, and should allow the researcher to adjust depending on the flow of the discussion. It should also provide alternate orders for the various guide sections.