



Qualitative Research Consultants Association, Inc.

Professionalism Committee

Position Paper

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“Why should I use a professional moderator?”

Once, a corporate marketing manager and a qualitative research consultant with a long association of many successful focus groups sat down to discuss an upcoming project.

“I feel a little funny saying this, but I’m considering having one of our own people, Mary, moderate some groups,” the manager said. “Mary is young, bright and extremely personable. She knows the product, the industry, the marketplace, and the customers better than I could brief you on in a week. She talks the talk and walks the walk.

“Besides, all we want to know is why people buy the product, how they use it, their likes and dislikes, and what we could improve. With all due respect, you’re not really needed here. Almost anyone with people skills can ask these simple questions, keep order, and move the conversation along.

“Also, we want to find out how salespeople overcome their customers’ complaints about the product. As you know, getting salespeople to talk is no sweat. The major problem will be to shut them up so they don’t talk all at once, but Mary, who was once a salesperson, will have no trouble. You’re obviously a master, you make it all look very easy. But I think that a big mystique has been built up around moderating. I would like to get my analysts doing the easier groups to get hands-on experience and to cut our costs.

“Can I buy a few hours of your time for a little half-day workshop for Mary and a few other analysts to learn how to run a simple focus group?”

The consultant was so flabbergasted that she was at a loss for words. She wanted to ask, “Would you go to an amateur physician or an amateur psychologist with a ‘simple’ problem?

Would you let an amateur pilot a 747 or write an ‘unimportant’ contract for you? Can you train people to be professionals in a half-day to learn all they need to know?” But she knew that such words, however satisfying to her ego, would likely cost her the relationship. Instead, she said she would think about it.

She had never explained to her client the competencies that went into making a “Pro”: the years of study and practice in several disciplines that allow her to breeze into a group and “do her thing” with effortless good humor, without making it look like work... to project an attitude of nonchalance, equanimity, and calm.

Later that night...

She was so upset she couldn’t sleep. In the midst of feeling underappreciated, she started thinking about professionalism.

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of study and practice in several disciplines that allow her to breeze into a group and “do her thing” with effortless good humor, without making it look like work. In fact, it is her consummate professionalism that allows her to project an attitude of nonchalance, equanimity, and calm.

In discussing this situation with her qualitative research colleagues the next day, she heard other horror stories. Such as the attorney who offered to run focus groups with bank presidents as a strategy to land the bank’s law business. Or the inexperienced moderator who fled a group when a fist fight broke out among blue-collar beer drinkers. Or the beginner who was bamboozled by physicians who enjoy regaling naïve moderators with outrageous

medical stories.

QRCA gets involved

The anecdote of Mary the former salesperson *cum* focus group moderator, together with similar experiences and realizations on the part of members of the Professionalism Committee of the Qualitative Research Consultants

Association (QRCA), led to a lengthy self-examination and ongoing discussion about the practice and appreciation of the term “professionalism.”

As one consultant commented, “Professionalism is like pornography. I can’t precisely define it, but I know it when I see it. The problem is that for everyone, it’s a little different.”

We asked ourselves, “What distinguishes the professional from the seemingly competent amateur? And why not go with that amateur when a client needs to save money?” After sharing our various viewpoints, we found we had compiled a rather imposing list to address those issues. Here is that list, generated by a group of highly experienced, well-recognized qualitative research consultants:

25 reasons to use a professional

1. For plain vanilla, run-of-the-mill, mundane focus groups, any moderator will do. The problem is that there are no plain vanilla, run-of-the-mill, mundane focus groups. There are always—even in the “simplest” of groups—complex issues of getting people in touch with their real thoughts and feelings, creating the atmosphere to allow people to express themselves, sorting out the relative importance of the overwhelming amount of information that arises, and dealing with the multi-million-dollar ideas that weren’t on the discussion guide. If a simple, straightforward, consistent answer emerges in a focus group study, that answer is often incomplete, or it is the response to the wrong questions.

2. Professionals prefer to be called “consultants” because we do much more than moderate groups. As qualitative research consultants, we recognize the implications of our findings. We are better able to turn data into information, information into knowledge, and sometimes knowledge into wisdom. We know how to develop and test strategies and executions, how to de-

sign a study to meet the client’s needs. We also help clients identify and prioritize needs, and provide direction for critical marketing decisions. So, long before we enter the focus room, we can increase the likelihood of success. Pros have marketing savvy and context. We can report on trends in other categories and industries, giving broad perspectives without revealing proprietary information.

3. Pros create an atmosphere of psychological safety, encouraging respondents to express divergent or embarrassing thoughts and feelings. This is perhaps the most important thing that we do, yet it is often completely invisible to participant and client alike. It is probably our most under appreciated skill. Since respondents can feel vulnerable or at risk during a discussion, they are much more comfortable and therefore more productive when they sense that they are in the hands of a Pro.

4. Pros are better able to interpret what we hear, report it coherently to the client, and make practical recommendations. We are better able to read people, identify their real meanings, hear the themes and subtext—the texture as well as the substance, the counterpoint, beat, and mood as well as the melody.

5. The Pro is much more likely to be up on the latest techniques, interventions and methods. We train each other and have a deep commitment to improving and honing our skills through self-examination and skill development that outsiders usually don’t see or appreciate. QRCA and other venues provide us with an awareness of current trends, the body of qualitative research knowledge, training, ethical considerations, and standards. We are involved in our profession full time. Our vast rep-

ertoire of techniques allows for greater spontaneity, and an instant change in direction if one method is not working. It also makes possible validation and corroboration, since the consultant is not confined to only one approach. Pros are better able to come up with creative ideas during the group to bounce off participants, rather than having to wait for subsequent sessions. Most importantly, our skills allow for productive, deep and complete probing of critical areas.

6. Professional consultants do not take verbalizations at face value, but dig out hidden meanings. Example: Physicians in a focus group said that they didn’t prescribe a particular drug because of its side effects.

However, when further probing revealed that they were also against an identical drug “under development” with no side effects, it became evident that the real obstacle was physicians’ discomfort with changing their accepted procedures. Therefore, the consultant suggested focusing the sales campaign on changing the physicians’ behavior. A less skilled moderator might have mistakenly recommended overcoming objections to the drug’s side effects.

7. The Pro is simply better trained, drawing on a breadth of experience and education (formal or informal) in psychology, sociology, anthropology, political science, linguistics, group dynamics, marketing, finance, manufacturing, management and many other fields. Most of us have studied several different and specific disciplines and techniques in training programs, workshops, practica, apprenticeships, and the like.

8. Professional consultants understand and have respect for the process. We know how to handle fluid situations without losing sight of the objectives, even if we have to take an approach completely different from what was

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planned. We expect the unexpected and know how to take advantage of it. The main reason that airline pilots are paid so much (there are many more waiting in the wings to take the place of those who have jobs: the pay could be less), is that we want to have the people with the highest level of skill to get us out of difficulty. The routine is not the issue, it's the unexpected. We have more than our share of the unexpected. It's our job, and we thrive on it. In fact our clients tell us that the emergence of unexpected ideas is the main benefit and *raison d'être* for the focus group methodology. We also know how to keep difficult respondents from ruining the group, or unanticipated issues from sabotaging the objectives.

9. Experience gives the Pro breadth of understanding and a highly developed BS Detector. Often, people who don't like a product "damn it with faint praise," which excites the product manager because the words are positive. Professionals don't take opinions at face value. And Pros are not easily fooled by rationalizations. Often, consumers buy on the basis of emotion (desires, wishes, anticipated satisfactions, etc.), then justify their choice on the basis of logic. Pros get beyond the rationalizations to the motivations.

10. The Pro is not afraid to ask "dumb questions" that might be embarrassing to someone in the industry or the client company. There is no need to appear knowledgeable to respondents. The Pro knows that some of the best information comes from questioning the conventional wisdom of an industry, so pros will explore a whole gamut of issues, from the subtle to the obvious. Industries tend to be in-bred and

wedded to particular ways of doing things. The Pro can challenge this.

11. Pros can cut through industry terminology and jargon to get to the respondents' real meaning and understanding. Pros also have an uncanny ability to capture language, hot buttons, positions, compelling arguments, and perceptions that seem to elude the less experienced.

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12. Pros know how to recognize defensive behavior and get around it. For instance, people often retreat into confusion, distraction, intellectualization, humor, seriousness, passivity, belligerency, and dozens of other behaviors which make them feel better about themselves and/or remove threats. Pros recognize these for what they are and have a well-developed repertoire for harnessing this energy and turning it into more constructive channels.

13. Professionals recognize that talking is not necessarily openness, that talkativeness is not necessarily candor, that high energy participation is not necessarily more valid than dull droning, and that inarticulate people may have extraordinary insights and different ways of expressing themselves.

14. Pros are trained to maintain objectivity. Pros recognize personal beliefs and biases, and scrupulously check them out and challenge them. We know how to steer discussions with a minimum of direction and bias. We know how to avoid tipping off what is important to us or what outcomes the client wants.

15. Most pros can distinguish attitudes, opinions, beliefs, convictions,

values, needs, wants, wishes, coping mechanisms, defenses and the other myriad psychological issues that have to be sorted out to develop a coherent marketing plan.

16. While unskilled questioning can get information, it won't attain as much of the necessary information as professional probing. We're more likely to get the full range of attitudes, beliefs and behavior because we know how to delve into the values, feelings and other subconscious drivers of decision making. Pros can get beyond dealing with challenging responses, such as, "Ads don't influence me."

17. Experienced, professional consultants are very sensitive to what is missing or atypical of the groups. It takes consummate skill to notice what people aren't saying or doing. Examples: A Pro was listening to a whole string of positive statements about a particular line of blankets, but she observed that the participants weren't touching the blankets on the table before them. When she expressed her observation to the respondents, the negatives came pouring out. In another situation, participants were extremely negative about a particular store. However, when they were given a projective task to do, it was discovered that their image of the store was much higher than that of other stores.

18. Because of our large experience base, we notice anomalies, contradictions, inconsistencies and things that "just don't ring true." And we know how to investigate them without turning people off. Sometimes respondents have to be challenged. For instance, we can play devil's advocate in a good-natured way that doesn't come across as contentious and argumentative. In this way, we can test the strength of beliefs, how people will answer challenges, how secure and comfortable they are with their opinions.

19. We know how and when to regulate the pace and direction of the discussion. We know the priorities and can make the difficult breadth vs. depth

decisions that are needed instantaneously during the session.

20. Pros are better able to handle and take advantage of the ethnic, cultural, gender and other diversity within and between groups.

21. Pros can handle sensitive topics with aplomb, dignity and straightforwardness.

22. The Big Idea, while not always apparent, is much more likely to be unearthed and developed by a Pro. Amateurs concentrate on getting through the guide. Pros focus on the client's critical success factors, objectives, and strategies. We are told that the idea of keeping baking soda in the refrigerator to absorb odors was discovered from a passing remark in a focus group.

23. Pros are more likely to have the stature and the inclination to stand up to the client when we know that the client is making a mistake.

24. An essential component of professionalism is adherence to the highest possible ethical standards.

25. One of the definitions of "professionalism" is "consistently excellent performance." Pros have a way of looking like pros, amateurs like amateurs. Our command of the situation actively engages both participants and observers, and makes the research director look good to top management. Pros understand the importance of building a relationship with the client and the client company, rather than just doing a project.

Now, back to Mary...

Should Mary, the in-house analyst and former salesperson, moderate the groups? Should the consultant put on an afternoon workshop to teach her clients' staff how to conduct focus groups?

In fact, the consultant showed the list of professional criteria to the marketing manager, who realized that you don't train people to "run focus groups" in an afternoon workshop, or even in a week or a year. The manager recognized that he would not be serving either his company or his career well if he allowed an untrained and inexperienced person—no matter how intelli-

gent and knowledgeable about the industry—to run even the "simplest" of groups.

He understood that the "easy" salesperson groups could potentially be the most difficult of all. While salespeople would appear gregarious, cooperative and even candid, there is a greater probability of hidden agendas, red herrings, smokescreens, manipulation, and avoidance of the difficult topics, such as the issues which make salespeople feel uncomfortable or even incompetent. Also, specific techniques would be needed to keep the group from degenerating into a gripe session, and to turn it around if it did.

The consultant agreed to put on a workshop for the manager's analysts, but not the one originally requested. She offered to help the analysts learn how to get the most from qualitative research, including some of the subtleties of research design, recruiting, construction of the moderator's guide, observing the groups, and interpreting the results.

As a result, they all discovered that there are more issues than are usually communicated. Everyone won.



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committed to the highest professional standards and the advancement of the discipline*