qualitative research

Begin with a head start

By John Gongos

Five common traps for new moderators and how to avoid them

With the cost of focus groups often exceeding $7,000 per group, it is no wonder that most clients are reluctant to experiment with a new moderator. Since the ultimate success of a qualitative project rests heavily on the moderator's shoulders, it is difficult for a client to justify the risk of hiring someone who is inexperienced.

Having moderated over 1,200 focus groups and watched more than a dozen new moderators begin their moderating careers, I have observed several key barriers that new moderators face and have compiled effective strategies to overcome these hurdles.

This article is designed to accelerate the learning curve for new moderators, ultimately benefiting them and the clients who have trusted them to lead the research. When that first opportunity arises, a new moderator can be ready to perform like a veteran by not falling into the following common moderating traps:

Trap #1: Losing control of time
Trap #2: Not being yourself
Trap #3: Losing track of the big picture
Trap #4: Not projecting confidence
Trap #5: The Lone Ranger syndrome

Trap #1: Losing control of time

This is by far the single most common trap that I have seen new moderators struggle with, and surely the most damaging. In most discussion guides, the initial section may include a quick warm-up or background information, with the discussion progressively moving into more important topics. With good intentions, a new moderator will focus on covering all the questions in the guide, following up with effective probing, and at the same time making sure to get everyone involved in the discussion. Two sections into the group, however, the moderator checks the clock and realizes the session is 20 minutes behind schedule. Panic sets in, and he or she ends up rushing through the most important sections of the guide, compromising some of the critical objectives.

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Time management can be difficult for even the most experienced moderator when working through a discussion guide for the first time, with the first group. However, because each group is equally important to the success of a project, the moderator must effectively manage the time from the start of the first group to the end of the last.

Tips:

• Create a cushion. When developing the guide, be realistic about what can be accomplished in your set time frame. Overestimate the time required for each section.

• Set the stage. Advise the client of your timing strategy. Let them know that you don't always probe as deeply during the very first group.

• Prioritize. Make sure you know which sections or questions are most important to the client, clarifying which questions to deemphasize or skip if time gets tight.

• Get a feel. Purposely probe less in the first group so you get a feel for the flow and timing.

• Don't rush. Do not feel the need to ask every question in the guide. Sometimes the best insights come unexpectedly.

• Trust your respondents. You don't always need to hear from each respondent on every issue. In a good discussion, respondents will chime in when they have something important to share.

• Don't be afraid. To jump in, that is. Control long-winded respondents and don't be shy to politely interrupt them.

• Monitor time. During the first group, it is important to monitor the time closely and save time for the most important sections no matter what!

Trap #2: Not being yourself

Most new moderators learn about qualitative research by observing other, more experienced moderators. It is natural to want to model moderators who are already established, especially if you notice that clients love their style. But, while that style may work for them, it may not work for you. I have seen extremely successful moderators with dramatically different styles (i.e., high-energy, analytical, curious, bubbly and professor-like). There is no one ideal style.

What generally does not work is trying to be someone you are not. Not only can it come across as disingenuous, it requires more energy to change your style for the duration of a group. This is not to say you can't adjust your style slightly to be more effective. But, it is much easier to turn up the energy a bit or talk a little less than normal than it is to completely change your style or personality.

Tips:

• Know who you are. Identify your style by understanding what people enjoy about your personality. The very things that people enjoy about you are what will make you an effective moderator.

• Don't intimidate. Do not try to sound too professional or serious. Talk to consumers like you talk to your friends and do not make the mistake of sounding "corporate."

• Observe in numbers. Observing as many moderators as possible will reinforce the theory that there is no one right style for moderating, and demonstrate how others have made their individual styles work.

Trap #3: Losing track of the big picture

A common trait of the most successful moderators is their ability to focus on discussion details while keeping key objectives in mind throughout the entire project. New moderators tend to be more sequential, focusing solely on the details of the fieldwork discussion, and then try to step back and look at the big picture when writing the report. By then it can be too late.

One of the advantages of qualitative research is that its flexibility allows you to tailor the discussion. An experienced moderator uses his or her understanding of the objectives to answer the clients' ultimate research initiatives. Sometimes that means probing deeper in one area. Other times it means following a respondent's comment down an entirely different path. Remember, you are moderating to the objectives of the study, not to the questions on the piece of paper we call the moderator's guide.

Tips:

• Understand the strategic decision. Prior to developing the guide, spend ample time with your client discussing and understanding the key objectives and business decisions that are to be made.

• Keep it top of mind. List the key objectives in the discussion guide as a constant reminder.

• Be the detective. It is the moderator's responsibility to take the discussion into areas that look interesting and fruitful. Think of the discussion as more of an exploration than a road map you have to follow.

• Learn along the way. After each group, identify two or three key learnings for each of the main objectives. This will keep the big picture top-of-mind throughout the entire process.

• Deliver a quick top-line. Deliver a one-page top-line report within 24 hours of the last group. This will force you to keep your goal in sight and lend to more efficient report writing.

Trap #4: Not projecting confidence

It's no surprise that clients prefer to work with moderators they have confidence in. That confidence can be built at every step of the project - and also can be lost at any step of the project. The most important place to project confidence is in the focus group itself.

Often, perfectly capable moderators who are newer to the game fail to project the confidence and presence required to effectively lead the group. It is the moderator's responsibility to lead the discussion, which means exerting the control necessary to calm things down, pump the energy up, redirect the discussion or do whatever is required. Many new moderators let the group lead them, seemingly going along for the ride. Being too quiet, nervous or passive will make it impossible to project the confidence that clients expect to see.

Equally as important, you must project confidence in the viewing room when interacting with clients before and after the groups. Most clients prefer to work with moderators who are engaged with the strategic objectives of the study and who can contribute to the interpretation of consumer feedback. A common challenge among newer moderators is to assume the role of an order taker, someone who is merely being hired to facilitate a discussion and ask questions. The real task at hand is to find a way to utilize respondent feedback to effectively answer the research objectives, ultimately helping the client make better decisions. This requires the confidence to have strategic discussions with clients and have a strong point of view on what it all means.

One important word of caution: Being confident and being in control does not mean having all the answers! No one expects the moderator to have all the answers and, more importantly, no one likes to work with somebody who "knows it all." You can be actively engaged in strategic discussions without having all the answers.

Tips:

• Practice before the real game. When possible, conduct a small practice group before going into the field to build your confidence with the material.

• Get a head start. Mingle with respondents prior to the start of the group to build your comfort level and reduce nervousness.

• Be prepared. The more prepared you are, the more confident you will be.

• Have fun. Do not fall in the trap of being too serious or trying to be perfect. Smiling and laughing with respondents goes a long way.

• Be professional. But be likable. This is the ideal image to project.

• Take initiative. Initiate strategic discussions with your client to learn more about their expectations.

• Know your client. Take the time to really get to know your clients. The more they know you, the more confidence they will have in you, leaving you feeling more comfortable with the entire process.

<u>Trap #5: Being the Lone Ranger</u>

Being a moderator can be a lonely job…if you let it. On a typical project, there might be anywhere from four to 10 clients attending the sessions, along with only one moderator. One mistake that new moderators fall into is not successfully integrating into the client team quickly enough. Perhaps out of respect or feeling like an outsider, many moderators stay out of client discussions in the back room and focus on the moderating task at hand.

The faster the moderator can function as a member of the client team, the sooner he or she will understand the strategic implications of the research and gain the confidence of the team. When successfully integrated, great moderators can create an atmosphere where it feels like the entire team is learning from respondents, sharing the weight of the study - not leaving it solely on the moderator's shoulders.

Tips:

• Do your homework. Understand who is attending the groups ahead of time, as well as each person's role.

• Understand each client. Schedule time prior to the first group to review the guide with the team so you understand the hot buttons of each individual.

• Be a partner. Gradually position yourself as part of their team.

• Have support. Bring a project coordinator or analyst to the project when possible to help manage the back room and provide additional integration into the client team.

• Open up. Don't be shy! Take the time to get to know the clients personally.

No matter what role you play in marketing research, or any industry for that matter, no one wants to feel detached from the team. Communication and a shared vision are key. Truly understanding the client's goals and maintaining an open exchange of ideas will help facilitate the path to becoming a seasoned and respected moderator.

To be sure, integrating well into the client team can make your travels much more enjoyable and rewarding! Many times the best opportunity to create strong client relationships is when you are on the road together. That can lead to a long and prosperous business relationship. And that is what we all want. | Q