**QualBoards: A New Approach to
Qualitative Research**

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Online Qualitative
Enabled

Welcome to an overview of a new method for qualitative research. We hope you discover, as we have, that this is a whole new method, not just an old method ported to the online world.

If you have any questions, please feel free to email us with your questions. Email Rusty Campos at rusty@cr-a.com or Ellen Campos at ellen@cr-a.com.

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basics

what it is and how it works
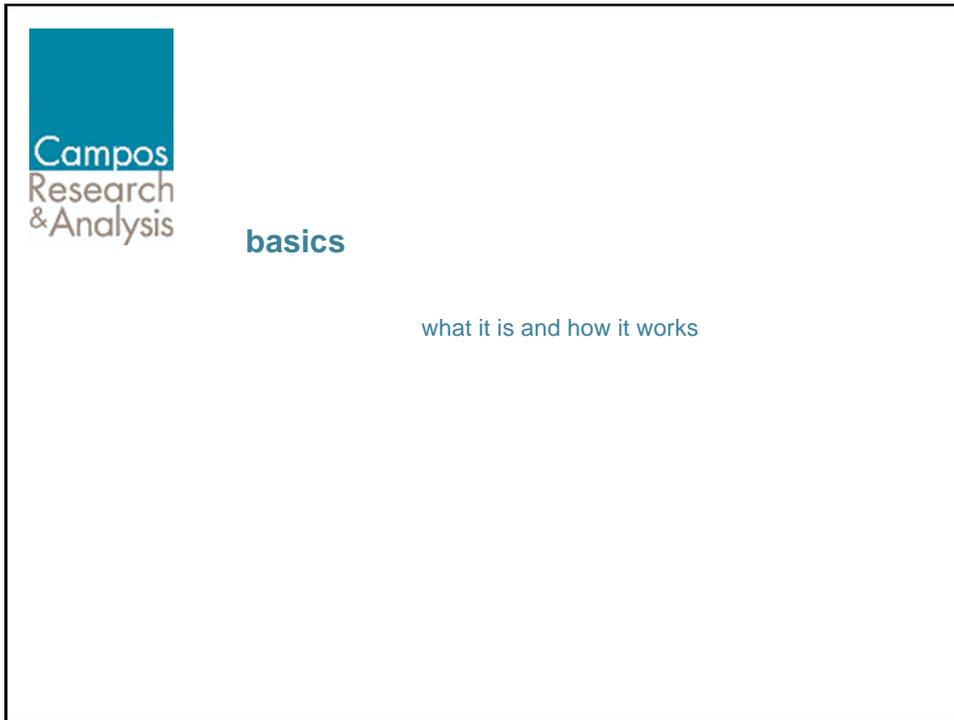
In this first section, we will cover the basics of the method—what it looks like, how it works, what you can expect.

QualBoards are like groups, but not

❖ like
- ✓ Exploratory forum
- ✓ Involves participants, moderator(s), clients
- ✓ Follow discussion guide
  - ▪ Ability to probe and adjust flow of discussion
- ✓ Interaction between participants develops synergies in the discussion

❖ but not
- ✓ Participants' control and convenience leads to participation over time
- ✓ More "time" for each participant to voice their thoughts leading to rich, thoughtful discussion
- ✓ Discussion flows by day-parts
- ✓ 15-20 participants per session
- ✓ Gross weight transcript of 4 focus group sessions

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We want to compare this new method to focus groups primarily to provide a familiar benchmark, although we want to stress that this method is very different from focus groups, and in the end, should not be compared directly.

It is similar in that it involves the typical in-person qualitative elements—participants that are recruited based on specific criteria, clients that can observe the proceedings, and a moderator that directs the flow of conversation. It follows a planned discussion guide. It is an exploratory discussion forum where participants can interact one with another, thus building off each others' ideas. And, moderators use some of the same skills in directing the discussion as with other qualitative methods.

It differs in that:

1. Each participant gets more time to "speak" and thus the discussion is typically much richer, more thoughtful and deeper than in a focus group. It is also less spontaneous. (However, this does not mean it is less emotional; emotions and feelings can come through well in this type of discussion.)

2. The discussion is not done in real-time. It occurs over the course of a few days with participants taking part in the discussion when they want to. This control and convenience for the participants leads to greater participation.

3. In a focus group, the discussion is typically divided into 10 or 20 minute sections. In this approach, it is typically divided into half-day parts (more on this later).

4. It can include at least 15 and as many as 25 or 30 participants.

to make it simple to remember, think…

Depth of content of In-depth Interviews	Group interaction of Focus Groups

Deep, rich, well-articulated discussion of issues

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This method combines the content and depth of personal interviews with the group dynamics and interaction of focus groups.

So it really is a unique new method for qualitative research that fills the gap between focus groups and interviews.

recruiting takes place like any other qualitative project

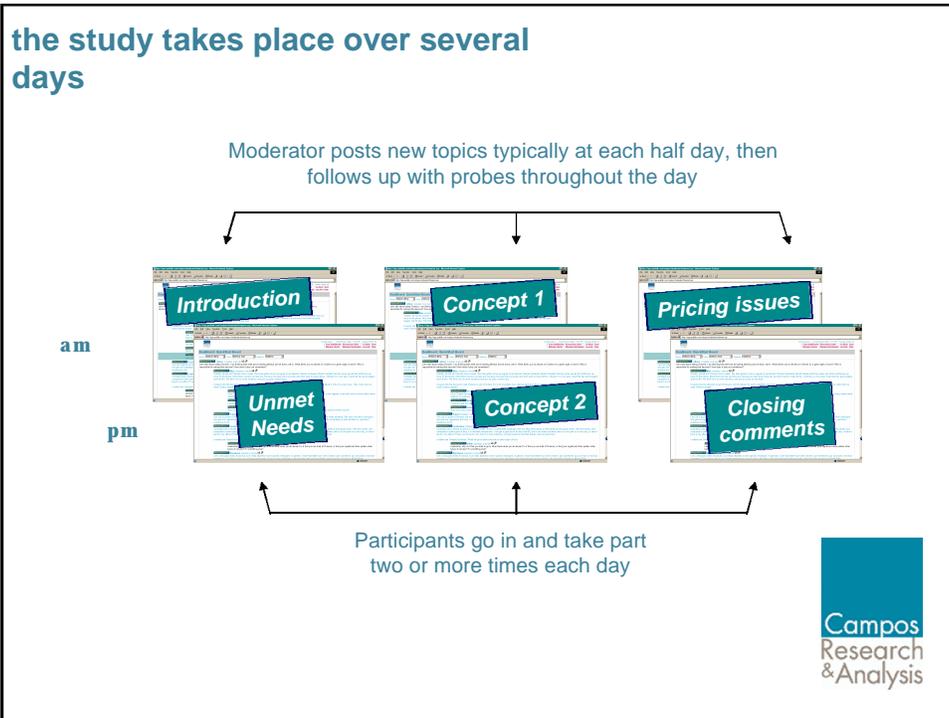Add/Import → Invite to Screener → Screen → Confirm

The method may be online, and recruiting may be conducted online, but nonetheless it follows the same process as recruiting for any well-done qualitative study. We create recruiting criteria and a screening survey, then recruit. If done by email, we typically invite participants via email to the screener. Using the software, the screener is created and participants are tracked from the invitation into actual participation in the discussion.

We can recruit using other methods, including the phone. In fact, we have found that it is best to confirm by phone. This serves as a second screener and as a security check.

If we recruit using email, we will need a good list. QualTalk and Campos Research and Analysis have ready access to several sample sources for email addresses.
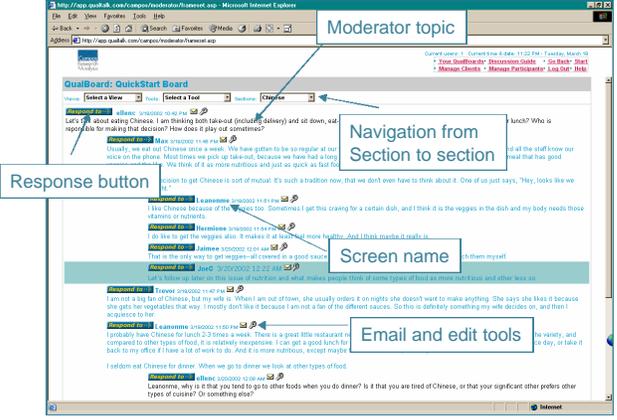
Participants are confirmed by email, which includes instructions and their login information including passwords.

the study takes place over several days

Moderator posts new topics typically at each half day, then follows up with probes throughout the day

Introduction   Concept 1   Pricing issues

am

Unmet Needs   Concept 2   Closing comments

pm

Participants go in and take part two or more times each day

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A QualBoard takes place over several days. This seems odd to most people at first, but this is the reason that this method works so well…the convenience and control that participants experience leads to rich, deep discussion.

When participants are invited into the discussion (the confirmation notice), they are asked to log in 2-3 times a day. In reality, they log in much more than that. The moderator will post topics—the questions—a couple of times each day, typically in the morning and afternoon. As participants log in, they will answer the moderator and talk to each other. Even though they are not logged in at the same time, the discussion develops as if they were.

the discussion follows simple threads

When a participant logs in, they are brought right into the discussion. The moderator will have posted the topic—basically a question they are posing to the participants—just like in an interview. The discussion is divided into sections—which are typically half-day portions. Each section typically has 3-4 moderator topics. As participants answer the moderator's questions, they also begin to talk to each other. The discussion evolves into "threads", which you can see by the indentations of the text. It is easy to navigate from section to section. Typically you can go backwards, but not forwards. (As a moderator, you set up the discussion guide so that only the sections and topics you want to appear by a certain time and date do so. This way the discussion truly unfolds over the few days.)

Each participant has their own screen name—typically it is their first name, but can be anything. Anonymity can be helpful for dealing with sensitive topics.

Moderators can send email to each participant from the discussion. This is a good way to encourage and privately redirect respondents. We can also edit comments if need be.

## all participants do to take part is press the respond button

The basic mechanism for the discussion is the "respond to" button. It's as simple as what you see here. You click, type in your response and then submit. The response immediately shows up as a thread in the discussion.

The moderator can ask follow-up questions in the same way.

Clients can post questions to the moderator or to each other. All "backroom" comments are hidden from the participants.

uses

actual cases that illustrate the
variety of situations where this has
worked very well
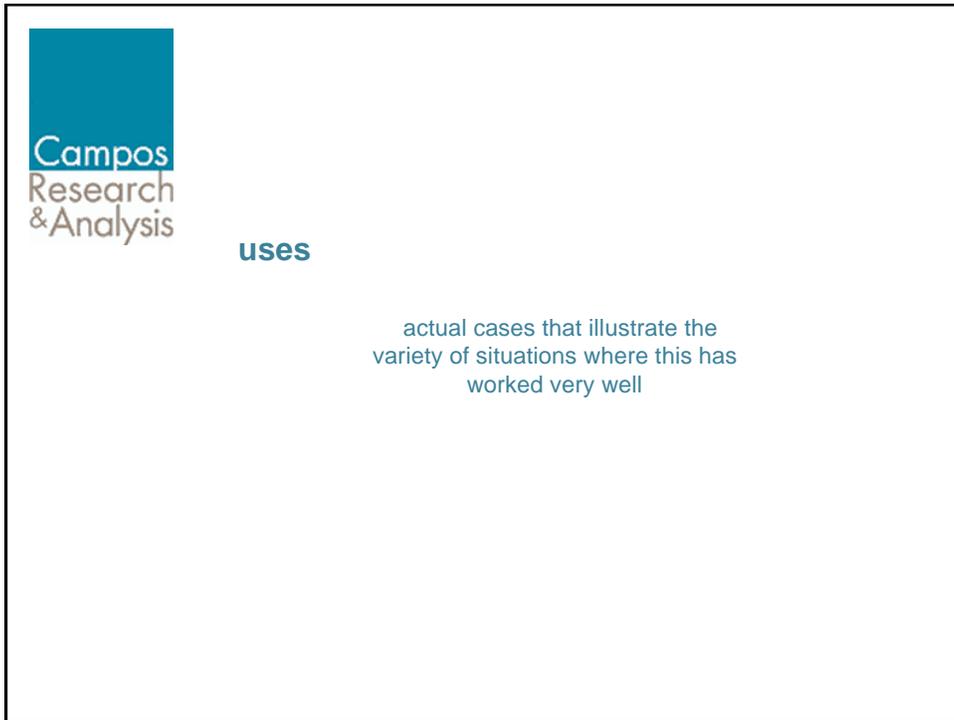
Sometimes it helps to see how others have effectively used a new method. In this section we will cover some case studies to illustrate the primary uses of this method.

high involvement product categories or issues

- ❖ Publisher wanted to learn what women want in a fashion shopping experience
  - ✓ Participants became extremely interactive with one another, leading to high value building in the conversations
- ❖ A Web site wanted to get detailed information on the user experience
  - ✓ Participants took time to explore the site in depth and then comment in detail on their opinions about the experience

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Probably the most important criterion for selecting this method is whether or not participants will have something to say about your issue. It needs to be something they are highly involved in. This makes it ideal for most business-to-business or professional issues, or complex products or services.

geographically dispersed respondents

- ❖ Education company needed to get feedback from guidance counselors in top 50 school districts in US
  - ✓ Participants from Washington, Utah, Wyoming, Texas, Florida, Virginia and California…
- ❖ Major manufacturer wanted to conduct research in several countries simultaneously on HR issues
  - ✓ Sessions conducted in German among Germans, and English among Indians, Malaysians and Japanese

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Any form of online research can provide you with a greater array of geography and this is no exception. This is one reason that one discussion session may be enough to get you the content you need.

This also makes it an ideal tool for global discussions, qualitative research among retail or reseller chains or among professionals who are low incidence.

participants too busy to attend groups

❖ Manufacturer needed to talk to retail channel managers
- ✓ Most indicated they would not take part in traditional groups (too much time and inconvenience) and surveys (did not feel they were taken seriously)
- ✓ Each participant spent at least 30 minutes each day over 5 days and provided detailed feedback on new reseller program ideas

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Many types of respondents are just too busy to attend focus groups or scheduled central location interviews. Even scheduling a phone interview may be difficult. High level professionals, medical professionals, and busy moms are just some of the types of participants that will take part when they can do it at their convenience, but would have difficulty taking part in traditional qualitative research.

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new uses

creative uses that build on the
capabilities of this tool
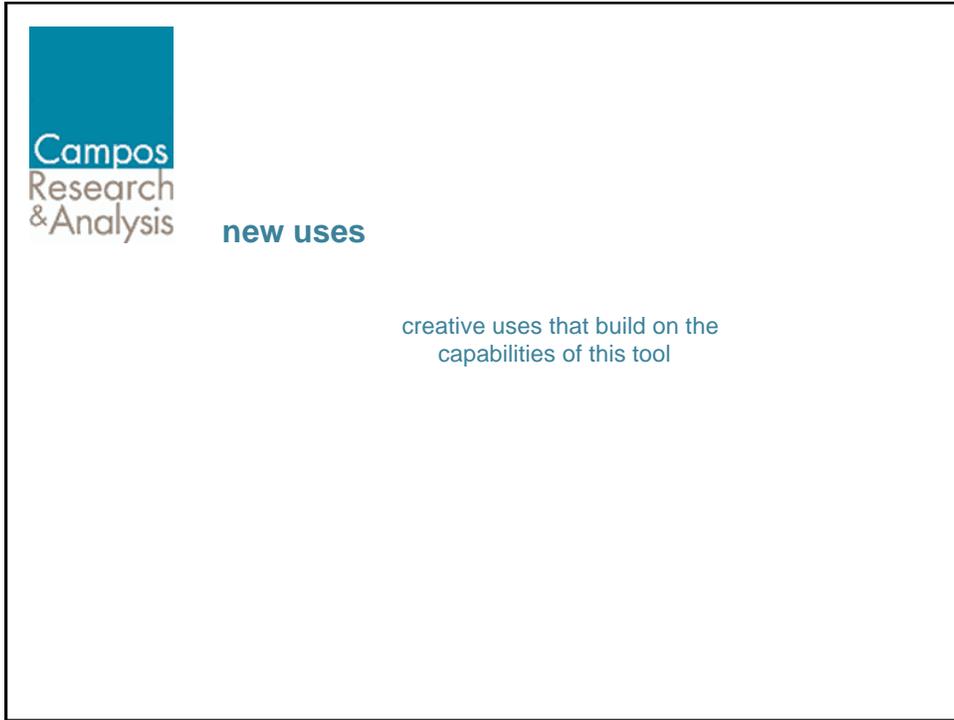
Last, we would like to cover some ideas that have stemmed from this being
such a new tool.

variety of uses make sense

❖ Could use as an interactive journal during product trial, product usage or beta test to get inside the daily experience
❖ Insurance company used a pseudo-ethno approach by having participants conduct a business case over a couple weeks
❖ Software company screened participants from a concept test and diagnosed reasons for liking and disliking the concept
❖ Can combine with traditional approaches to get both "live" responses and depth of content
❖ Use to brainstorm and innovate

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Because this is a relatively new method, there are a variety of uses we have seen recently. For example, during a product usage trial you can use the QualBoard as an interactive journal. You can treat the discussion almost like a mini-conference for professionals and just watch what they talk about. One of the most innovative uses was an insurance company that had participants actually create a business case, watching the decisions they made.

It can also be used as a follow-on to quantitative research—almost making the survey the screener, to then get diagnostic information on survey results.

An exciting use is to conduct traditional qualitative and then follow up with online QualBoards with the same participants. Because they have already developed a relationship, the content is even richer than normal. This can be particularly effective in concept development where iterations can be reviewed by customers.

For years, bulletin boards have been used to more effectively brainstorm within organizations. This is an ideal tool for so doing.

valuable features

❖ Unaided response
  ✓ Allows you to get unbiased reactions to concepts, ads, etc. by hiding responses from participants until they have first answered
❖ Email management
  ✓ Allows you to provide homework assignments with links or applications to participants
❖ Backroom annotation
  ✓ Can use as an ongoing note-taking and ideation tool for the moderator and observers. Very useful for leapfrogging the obvious and for generating ideas on how results can be implemented

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There are a number of valuable features that our QualBoards offer.

1. The unaided response feature allows unbiased reactions to concepts, ads, etc. by hiding responses from participants until they have first answered the moderator's question. It is the online equivalent of having participants write down their thoughts on paper before discussing them.

2. Email management tools allow us to provide homework assignments with links or applications to participants. We can also better manage participation with reminders and encouragement via email.

3. A backroom annotation tool lets the moderator and observers take notes on the discussion for use in later analysis and allows discussion among clients/observers. This is particularly useful as a way to leapfrog the obvious and peel back the onion for ideas on how results can be implemented—using the respondent posts as springboards for brainstorming.

bottom line

A new method for qualitative research that gets rich, thoughtful discussion on high involvement topics.

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As a final thought, remember, this is a new, unique qualitative tool that provides rich content on issues.

contact

Campos Research and Analysis, LLC
6921 E. Nichols Place
Englewood, CO 80112-3131
Rusty Campos, Ph.D., **President 303-267-0453** rusty@cr-a.com
Ellen Campos, Ph.D., **Vice-President 303-771-5875** ellen@cr-a.com

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To do a project, contact Ellen or Rusty.