USING ARCHETYPES TO BUILD STRONG BRANDS

Program Preview
2011 ANNUAL QRCA CONFERENCE
ROBUST RESEARCH without Robust Resources
Eight Ways to Become a REFERRAL MAGNET
Thankfully, Schlesinger Associates Does Both

Actually, we can't help you with your dance moves. However, we will deliver a perfect pitch solution to fit your exact market research requirements. Whether it is qualitative or quantitative, Schlesinger Associates is your resource for complete global data collection services.

Tel. +1 866 549 3500

YOUR GLOBAL RESEARCH PARTNER, ANYWHERE, ANYTIME.
Recruitment  Focus Groups  Online  Technology  Global Project Management

SchlesingerAssociates.com
Creating Connections

In this high-tech world, it’s easy to forget that face-to-face interaction is still one of the best ways to learn about people’s experiences and impressions. Even though technology is playing an increasing role in data collection, we know it will never replace direct conversations with customers in a focus group setting.

At Delve, we help you find creative ways to connect with your customers. Whether it’s a traditional group or one that requires a more adventurous approach, we are experts in recruiting the right respondents to ensure your feedback is reliable and insightful.

Delve creates and fosters environments for dynamic dialogues between marketers and customers. Whether they be face-to-face, voice-to-voice, or an online setting, we are committed to providing the right amount of the right respondents in a delightful environment.

Count on our experts to bring you and your customers closer together. Connect with us today!

Focus Groups
Pre-Recruits
Telephone Interviews
Central Location Testing
Taste Tests
Online Qualitative
Interactive Voice Response
Multi-Market Project Management
Mixed Methodology Project Management

www.delve.com
helpinghand@delve.com
800-325-3338

Ten Locations To Delight & Amaze You!

Appleton
Bonnie Smerda

Kansas City
Jim Finke

Atlanta
Lesley Hansen

Minneapolis
Danelle Gorra

Chicago
Jill Karmann

Philadelphia
Kim Reale

Columbus
Pam Clouse

Phoenix
Donna Flynn

Dallas
Marsha Fugitt

Saint Louis
Jim Gobble

Delve®
USING ARCHETYPES TO BUILD STRONG BRANDS

COVER STORY: How have Coca-Cola, Apple, Johnson & Johnson, Walmart, Nike and Hallmark established some of the most memorable and relevant consumer brands in the world? They have used universal stories told since the dawn of mankind. Here are some tips for your brands.

PROGRAM PREVIEW FOR THE 2011 ANNUAL QRCA CONFERENCE IN LAS VEGAS, NEVADA

QRCA NEWS: This year’s program offers more professional-development sessions than ever before — by the best in our industry and by an impressive slate of experts from related fields. Plus, our first ever “Master Class” will take this Conference experience to the next level! Join us in Las Vegas, October 12–14.

MIXED METHODS: Capturing Air Travelers’ Roundtrip Airport Experiences

TRENDS: Sometimes, a single qualitative approach cannot adequately uncover the insights we need. Today, all the rage are mixed-method approaches that are not only highly engaging but also easy to conduct. Learn from this case study.

ROBUST RESEARCH without Robust Resources

TOOLBOX: A limited budget and scant manpower need not hinder your marketing research. A dynamic community panel may fulfill your needs quite cost effectively.
WHO HAS THE FOLLOWING?

8 FOCUS SUITES
5 FOCUS VISION UNITS
1 DEGREE CHEF
300 LINEN NAPKINS
44 RECRUITERS
1 STATISTICIAN
15 PRIVATE BATHROOMS
TOO MANY PARKING SPACES TO COUNT
5 DEDICATED PROJECT MANAGERS
3 FULL TIME FACILITY MANAGERS
1 “REAL” STAINLESS TEST KITCHEN (with mirrored observation room)
3 ADDITIONAL WORKING KITCHENS
41 ASSORTED BACHELOR/MASTER DEGREES
AND LEGENDARY VERSATILITY, HONESTY & CREATIVITY

BIGGER IS BETTER!!!!!!
DON'T BE FOOLLED BY IMITATORS
FULLY IMMERSED: Using Activities to Capture Consumer Behaviors, Context and Emotions

TOOLBOX: Tours. Show Me’s. Getting to Know You’s. Personification. Metaphors. Storytelling. Try these exercises with your respondents to reveal different layers of what drives consumer behaviors.

Vive la Différence!

GLOBAL RESEARCH: To understand the global pharmaceutical market, it is crucial to understand that people in different countries do not just think and speak in unfamiliar ways — they may act differently, as well. Such cultural quirks can profoundly affect both the research process and its results.

NewQual Diaries

TECH TALK: The qualitative diary is evolving far beyond the traditional pen-and-paper method. “NewQual” diaries can include video, audio, mobile access and even social media.

EIGHT WAYS to Become a Referral Magnet

BUSINESS MATTERS: Business referrals make the selling process dramatically easier — the customer comes to you, eager to buy. How, though, do you obtain these elusive referrals? Here are eight great strategies.

HOW TO USE SOCIAL MEDIA to Build Your Brand and Your Business

BUSINESS MATTERS: An experienced marketer provides easy-to-understand advice on how to use LinkedIn, Twitter and Facebook to promote your business.
First Group Free!

No Travel

Instant Transcripts

Full Support

Show text, images, videos & live web sites in real time.

Moderator: What do you like most about this new tool?

Carol: I like that I don't have to make a big financial investment to try this.

Bob: Today the value is in my moderating & analysis experience, clients don't want to see hotel expenses on the bill anymore.

Ron: The layout is simple, which makes it easy for me to understand.

Amy: I'm an independent qualitative researcher new to online, so I like the experience and support that's offered.

90 minutes
15+ participants
45+ questions
unlimited observers

Recruiting Available


Experience the value™

877-In-Heads
(877-464-3237)
InsideHeads.com
Before there were Cherry Garcia, Cookies & Cream, Maple Bacon and even Avocado, there were chocolate, vanilla and strawberry. Before there were TiVo, the internet, PS4, iTunes and Netflix, there were just two devices: the radio and the television. Before there were Air Jordans, Shape Ups and Skechers, there were Keds and Converse All Stars. And, in our own industry, before there were mobile, immersive, usability and MROC techniques, there were face-to-face focus groups and in-depth interviews. Seemingly unrelated? Not really. Despite the great differences and advancements in each of these categories, none have lost their iconic origins. Seven out of ten Americans still enjoy chocolate, vanilla or strawberry over any other ice cream flavor (USA Today, June 3, 2011). Nielsen’s Television Audience Report (2010) tells us that the average number of TV sets per American household is 2.93, and have you ever been in a car that did not have a radio? Checking the Converse website and searching “Chuck Taylor All-Star™” I found more than 400 variations in styles and colors; this choice of options has made the classic basketball shoe famous for nearly 100 years.

Do you think Ben & Jerry’s would be where it is today if the company offered only three flavors? The two founding gentlemen (Ben Cohen and Jerry Greenfield) took a correspondence course on making ice cream, and then they took that knowledge to build something new and incredible. The foundation for making good ice cream was already there, but these men experimented with the recipes and created an entirely new category — gourmet ice cream — in a food category that was not having any trouble.

So true is this for the qualitative market research industry. Advancements and innovations are ongoing. Visionaries work among us. Yet, this does not mean that face-to-face methods are dead. If you take a close look at any of the more recent methodologies, you will see that their roots are still based in a solid recipe of skilled moderators asking the right questions in a way that welcomes respondents to be candid. Evolution in our industry does not necessarily leave the foundational methods by the roadside; iconic qualitative research methods have an important place in our repertoire, and they always will. Instead, innovative methods open opportunities for us to be more inventive and valuable to the industries we serve.

This is how QRCA VIEWS can play an important part in helping you become more innovative — by exposing you to a variety of new ideas and the researchers who are passionate about them. This issue celebrates our evolving profession and the imaginative innovators among us: Dana Benny reports on how hybrid methodologies have grown in usefulness, Dana Slaughter and Kristin Schwitzer give us some spin-offs of the classic diary study, and Steve August tells us how to peel back the layers of motivators and emotions through activity-based research. Iconic imagery and theories are explored in Fritz Grutzner’s article about how strong brands leverage universal archetypes.

Also in this issue are the other areas that keep us growing, like two exceptional Business Matters articles, “Eight Ways to Become a Referral Magnet” by Dorrie Clark and “How Social Media Can Help Your Business” by Catherine Davis. Also see “Robust Research without Robust Resources” to learn how one huge co-op business in Canada has made the most of their two-person staff and limited research dollars by employing a community panel for their market research projects. You will find many more opportunities for growth and professional development on pages 56–71, highlighting the content at the annual QRCA Conference this October 12–14, 2011.

Just as QRCA and VIEWS have embraced the advancements in our industry, even iconic fore-runners such as Ben & Jerry’s have also moved forward. When Ben & Jerry’s was acquired by Unilever in 2000, Jostein Solheim became the new CEO. About the transition, Solheim said, “My mantra that I’ve repeated a hundred times since starting at Ben & Jerry’s is: ‘Change is a wonderful thing.’” I, too, believe this to be true.

So, whether you or not you are a Cherry Garcia fan, you will be happy to know that chocolate, vanilla and strawberry are still among Ben & Jerry’s top-selling flavors.
Editor’s Note
Changes in VIEWS are happening, too. The magazine itself has undergone a freshening-up, making our content easier to find and read. With the help of our publisher, QRCA VIEWS is now available on your smartphone, and a newly constructed search engine optimization solution makes it simpler to find archived articles using traditional web browsers.

Sadly, with this issue, we say good-bye and best wishes to two team members. Managing editor Sharon Livingston parts from the magazine after six years of dedicated service. Sharon’s energy, creativity and passion will be missed by the entire staff, but by no one more than me. It was my pleasure and privilege to have collaborated with her in shaping VIEWS to be the qualitative industry’s premiere educational magazine. Tech Talk feature editor Michael Mercier also retires with this issue. Everyone from VIEWS wishes them both the best of all adventures.

QRCA 2010–2011 Officers and Board of Directors

Nancy Hardwick
President

Susan Thornhill
Vice President

Matt Towers
Treasurer

Susan Saurage-Altenloh
Secretary

Manuela Fletcher
Director

Foster Winter
Director

Liz Van Patten
Director

Susan Abbott
Director

Benjamin Smithee
Director

Shannon Pfarr Thompson
Executive Director

Darrin Hubbard
Assistant Executive Director

David Ewald
Senior Advisor

Qualitative Research Consultants Association (QRCA) serves its members in the industry through education, promotion and representation. The statements and opinions expressed herein are those of the individual authors and do not necessarily represent the views of the association, its staff, or its board of directors, QRCA Views, or its editors. Likewise, the appearance of advertisers, or QRCA members, does not constitute an endorsement of the products or services featured in this, past or subsequent issues of this quarterly publication. Copyright ©2011 by the Qualitative Research Consultants Association. QRCA Views is published quarterly. Subscriptions are complimentary to members of QRCA. Presort standard postage is paid at Nashville, TN. Printed in the U.S.A. Reprints and Submissions: QRCA Views allows reprinting of material published here, upon request. Permission requests should be directed to QRCA. We are not responsible for unsolicited freelance manuscripts and photographs. Contact the managing editor for contribution information. Advertising: For display and classified advertising rates and insertions, please contact Leading Edge Communications, LLC, P.O. Box 680142, Franklin, TN 37068-0142, (615) 790-3718, Fax (615) 794-4524. Deadlines are the first of the month prior to the following month’s publication. (Example: August 1 for the September issue.) Subscriptions are free to members and are available to buyers upon request.
Our hope is that through your involvement with QRCA, you are introduced to a variety of methodologies, both the latest innovative approaches as well as the tried-and-true that you can incorporate into your qualitative research “toolbox.”

I have a good friend who plays on my co-ed volleyball team and who just turned 50. Bill decided that he would go on an adventure to celebrate his 50th year. His adventure even has a name, “50 in 50.” The plan is to visit all 50 states in his 50th year. That gave the rest of us on the team great fodder for brainstorming all the 50 in 50s we could come up with. My German friend said 50 different beers in 50 days. I was thinking 50 days off to do whatever I want might be a fun way to celebrate. No matter what the approach, we were all impressed with Bill’s commitment to take the time off of work, leave his family behind and head out on his great adventure.

Although Bill does not conduct research for a living, he is a true qualitative researcher at heart. One of his goals for this trip is to meet one person in each state he visits and learn a little about him (or her). Bill told me he just picks someone at random, confirms that he lives in the state and asks him three open-ended questions to get him talking. He then purchases a postcard from the area and sends it to himself with notes on his conversation. Bill chose a methodology that best met his needs and incorporated a consistent approach for each interaction. The results will be an amazing set of postcards with insights from people from around the United States.

As qualitative researchers, we do the same thing. We decide what the goals of the research are (in Bill’s case, it was the chance to meet someone in each state and learn a little about that person’s life), then choose a methodology that works best to meet those goals (taking into consideration time and budget) and then develop the questions or techniques that will be used to elicit the discussion and uncover the findings.

Each time we start a new research study, we work closely with our clients (internal or external) to clarify the goals of the research and determine what methodology is most appropriate for addressing those goals. Having a wide range of qualitative tools at our fingertips is critical for any qualitative researcher. Knowing what options are out there, the pros and cons of each methodology and the approach that works best in various situations enables us to be valuable consultants for our clients.

The mission of the Qualitative Research Consultants Association (QRCA) is to advance the discipline of qualitative research worldwide. As part of that mission, our goal is to provide industry-leading resources that are essential to members and professionals who use research. Our conferences, webcasts, website and VIEWS magazine are all resources for informing qualitative researchers — and research buyers — about the latest approaches to research. We also want to enable consultants to hone their qualitative research skills. Our hope is that through your involvement with QRCA, you are introduced to a variety of methodologies, both the latest innovative approaches as well as the tried-and-true that you can incorporate into your qualitative research “toolbox.”

QRCA members love brainstorming and coming up with the best approach for each new research project they are involved in. So, if you need some help, consider reaching out to one of them. The easiest way to find a QRCA member is through the “Find A Researcher” tab on QRCA.org. You can search for them by specialty area, language spoken or geographic area. Our members can be a huge resource, so don’t hesitate to contact them!

Oh, and by the way, my friend Bill left this morning on a flight to Anchorage, Alaska, state number 49 of 50. 🕌
Focus Group Experts for 25 years in Paris

Why?
At Puzzle Paris we understand how difficult it can sometimes be to find a reliable partner when conducting international research. That’s why for 25 years, we have been making sure we successfully meet our client’s needs.

Who?
Our creative and highly energetic team of senior researchers, project managers and recruiters collaborate together to help you unearth new insights that will help you to make better business decisions.

When?
We understand that your time is precious. So, you will always receive your quote without delay and recruitment will always be carried out within the required time specifications.

Where?
Our facilities are located in the heart of Paris, just in front of the world-famous Opera Garnier. 3 spacious Focus Group rooms 3 private client lounges Excellent catering for clients respondents

75% of our clients are American companies
Mixed Methods:
CAPTURING AIR TRAVELERS’ ROUNDTRIP AIRPORT EXPERIENCES

A complete view of the air traveler’s airport experience: putting a range of mobile and online qualitative methods into practice

BY DIANA BENNY
Benny Research & Consulting • London, England • diana@bennyresearch.co.uk

AND KEVIN MILLER
JCDecaux Airports

We had never been able to capture, in real time, the complete departing and returning journeys of a passenger — and have the ability to compare departing and arriving mindsets both at home and abroad.

Mixed methodology approaches are often recommended in market research proposals, but the mix generally refers to a combination of qualitative and quantitative methods. Less common are recommendations for mixing different types of qualitative methods. As researchers, we sometimes find that a single qualitative or quantitative approach cannot adequately fulfill the client’s needs — and in these situations, it is worth considering whether a mix of, for example, two types of qualitative methods would be better.

JCDecaux Airports sells advertising space in airports around the world to a wide range of corporations and brand owners. A recent project for JCDecaux Airports entailed specific research objectives that were successfully met through employing a mix of mobile and online qualitative approaches.

According to Kevin Miller of JCDecaux Airports, the company’s business has undertaken many investigative and ethnographic research projects in airports; however, the firm had not been able to capture, in real time, the complete roundtrip (departure and arrival) journey of a passenger and have the ability to compare passengers’ mindsets both at home and abroad. Filling that gap in understanding air travelers was the central focus of the research, with a secondary objective of exploring attitudes towards airport advertising. JCDecaux Airports also specified an important addendum to the project aims: the research must be qualitative and be conducted in situ, in real time and throughout individuals’ entire journeys.

At the outset, it was particularly important to capture air travelers’
experiences in a variety of spaces, including:

• At the departures lounge of the outward-bound airport.
• At the arrivals zones of the destination airport.
• At the departures lounge of the airport on the return journey.
• At the arrivals zones of the home airport on the return journey.

Taking on the Challenge: Choosing the Right Methodology

Faced with these challenges, it was critical to consider a variety of approaches, including traditional methods, such as face-to-face interviews and paper diaries/questionnaires, as well as newer, less conventional methods that employ devices such as digital voice recorders, voice mail, online discussions/journaling and Flip camcorders. It was soon apparent, however, that none of these presented a single, ideal solution for this project. While they all had several advantages, and most could have (at least, in theory) worked in situ, in real time and throughout participants’ entire journeys, each suffered from limitations that could seriously compromise the success of the project.

For example, face-to-face interviews can work quite well in obtaining on-the-spot feedback from people, but the method would be impractical, intrusive and cost prohibitive for the interviewer to accompany a participant on the entire journey. Similarly, digital voice recorders, voice mail and Flip cams are excellent methods for capturing in-the-moment thoughts and feelings, but without an interviewer’s presence, the participants would have to be given the questions in advance, which could affect the spontaneity of their responses.

The most critical shortcoming of all these approaches, though, was the lack of flexibility and control over the timing and content of each communication with the participants. A large part of the interview process for this project had to occur while participants were at airports, faced with the typical disruptions and distractions common to air travel. Given these circumstances, it would be risky to rely on participants remembering to record their thoughts and feelings at the correct places and times required.

In order to achieve control over the communication timings, it became clear that a mobile method would provide half of the best solution. Using people’s mobile phones as the interviewer’s main point of contact with air travelers at the airport delivered on three important criteria specified by the client: to obtain feedback in situ, in real time and at each stage of the journey.

Mobile research also allowed us to contact and follow up with participants at times that coincided exactly with each traveler’s itinerary, whether he was at the departure lounge or had just arrived at his destination. This would not have been possible using other qualitative methods that we had considered earlier.

Furthermore, sample recruitment was not restricted to owners of just one make or model of mobile phone. Anyone with a phone that could send/receive SMS/text messages and was set up for internet access could qualify for this project (provided the participant fulfilled other travel-related criteria). This considerably reduced sample bias.

Making It Happen: Mobile + Online

After selecting a methodology, it is important to find a supplier to deliver the technological solution. Focus Forums was selected as the technology partner for this particular project, as all mobile functions can be integrated as an element of the company’s online platform, including a mix of qualitative discussions, forums, blogs and journaling.

Focus Forums acted as a central depository for all the mobile and online research communications between the interviewer and participants during fieldwork — via email, SMS/text and/or voice messaging, at any time — making it a very flexible solution.

The incorporation of this online qualitative methodology added an extra dimension to the research design and broadened the context within which the air travelers’ attitudes and feelings could be compared, not just between the different airports they visited but also between airports and their homes (both before and after the journey). This ultimately made the project findings much richer than if mobile research was used simply as a stand-alone method.

Overall, platform multifunctionality allows researchers to extend the scope of the project by making use of online discussion board-type interviews — posting questions to respondents before, during and after their journeys — as well as engaging and capturing mobile responses in the same online space.

The mixed approach of using mobile and online qualitative methods allowed us to draw on the specific strengths of each (see below).

---

**Mobile Methodology Strengths**

- Communication by SMS/text messaging
- Communication by email
- Communication by voice messaging
- Ability to take and download photos/video footage

**Online Methodology Strengths**

- Setting up discussions as IDIs or as interactive forums
- Posting various topics for discussion
- Ability to show images

Good way to obtain participants’ feedback when they are on the move/traveling!
Overall, platform multifunctionality allows researchers to extend the scope of the project by making use of online discussion board-type interviews — posting questions to respondents before, during and after their journeys — as well as engaging and capturing mobile responses in the same online space.

In addition, this mixed method approach helps to support and accomplish the following benefits:

- It generates a high volume of quality respondent feedback and visual material.
- It allows clients to observe the entire process, increasing their involvement in the project and heightening their anticipation for the results.
- It provides full real-time transcripts of all communications, instantly accessible at any stage of the project.

**How Did It All Work? The Nuts and Bolts**

Initially, the total sample of participants was restricted to 12 air travelers (both business and leisure travelers), with an option to increase the sample at a later date. Fieldwork was scheduled over a 3-month period, in recognition that it could prove difficult to recruit even just 12 people who were travelling within a shorter time frame. All participants had to own a mobile phone with SMS/texting and internet-access capabilities. In addition to a substantial incentive for taking part in the project, participants were given a fair incentive to cover their mobile-phone usage while abroad (although unlimited data-roaming charges were not covered).

While recruitment was underway, we produced the interview guide for the mobile communications (via SMS/text messaging and email), consisting of a series of open-ended questions appropriate for the various stages of participants’ journeys. The questions were deliberately succinct, so that they could be read with ease from a mobile phone. We were conscious that too much content in the emails (or text messages) might appear daunting to participants or, worse, might go unread if people neglected to scroll far enough down their phone’s browser! Equally important, different mobile phones could display the same email content differently, and what might look clean and easy to read on an HTC Android phone, for example, could appear messy and difficult to read on a Blackberry.

The interview content was set within a research framework, covering each stage of the interview process, from pre-travel to airport interviews to post-travel. A degree of flexibility was built into the guide’s framework to accommodate different participants’ phone capabilities, individual confidence in using the phone and logistical considerations (for example, some countries might prohibit the taking of pictures in airports). Despite all that,
however, most participants were able to follow the standard process.

After each participant was recruited, we established personal contact with him or her (first by email, then again by phone), in order to establish a rapport as soon as possible. This initial contact also served as an opportunity for the interviewer to address any questions or concerns that the participant had about the project.

The first mobile interview with each participant took the form of a live text chat. In this study, participants were instructed to send an SMS/text message to the interviewer when they arrived at the airport's departure lounge. Once the interviewer received confirmation that the air traveler was ready for the interview, she posted and paced questions to the participants via text messages then and there. This live chat-like conversation solidified the relationship between the interviewer and the participants, helping to ensure their complete commitment to the remainder of the project. (No one dropped out mid-way through.)

For the remaining mobile communications, the interviewer sent an SMS/text message through the online software to alert participants that new questions had been sent to their email account. All of the communications were timed to coincide with participants’ real-time outward- and inward-bound journeys, including arrivals at the destination airport and communications from the departure lounge on the return trip.

Participants were told to have their phones turned on while in the airports, so the SMS/text message was the obvious way to prime them for new questions. Where possible, participants were asked to respond to questions by email rather than SMS/text, as email did not pose restrictions on the number of characters in the message; participants were subsequently able to give more detail in their responses.

In addition to the mobile-led interviews, the interviewer set up pre-travel, mid-travel and post-travel questions for the participants on Focus Forums, using the site’s discussion boards. Many of the post-travel questions were individually tailored based on participants’ responses to earlier communications.
JCDecaux Airports was eager to incorporate an interactive element to the process, so we also set up a post-travel “Air Research Forum” and invited each participant to visit the forum and respond to comments made by fellow participants on the topics and questions posted there.

Participants were also asked to complete a task at each airport they traveled through, using their mobile phone to capture photos or video footage of any advertising in the airport (departure or arrivals lounge) that they found eye-catching. They were instructed to download their photos/video to the research website, along with comments on why those particular ads caught their eye. This exercise provided enormous insight into reactions and attitudes towards airport advertising, and it added a powerful visual element to the presentation of the findings.

Top Tips for Mixed Mobile + Online Qualitative Studies

• Build a relationship with the participants in any way you can; particularly effective is making personal contact by phone at least once.
• Make sure participants are fully briefed on what is expected of them. Give them your contact details, so they can let you know early on if something is not going according to plan.
• Explain all instructions very, very clearly, and repeat critical instructions in relevant communications.
• Factor in time to run a pilot test before rolling out the full sample; testing that the technology is working properly is critical to the success of the project.
• Do not underestimate how much participants will agree to do (in terms of tasks and communications), but take care not to over-burden them.
• Incentivize well — this ensures commitment to the project and shows that you respect the participant’s role in the process.
• Take advantage of any available multimedia options. Clients love to see real photos, audio, etc., in presentations.
• Capitalize on the strengths of each method, so that you benefit from their specific advantages (e.g., mobile when on the move, online qual when showing images, etc.).
No games. Just research.
For many years, I was in charge of marketing for Johnson & Johnson’s line of baby products. One of our products was Johnson’s Baby Powder, which was always, for me, a great example of the emotional power of branding. When we conducted focus groups, consumers talked about the brand as if it were a close friend who gave them caring and love. Yet, we all knew that inside the bottle was simply talc (a rock ground up into a fine powder) and fragrance (a very special fragrance). What I learned from Johnson’s Baby Powder was that consumers don’t just buy products — they buy the story about the products, and all the emotion that comes along with these stories.

Companies can develop their brand strategies by identifying the “archetypal” story that best expresses their brand experience. These are stories like the hero, the caregiver and the mentor, stories that have been told around the campfire since the dawn of man. Archetypes prove to be very powerful tools to align a brand around a key emotional need in a way that both the client and the consumer can readily grasp. This approach has worked successfully for some of the largest consumer brands in the country, as well as for small non-profits and even business-to-business companies.

Archetypal Stories Are Universal
C.G. Jung used the term “archetype” to refer to universal ideas or characters he found appearing consistently in dreams and stories from cultures around the globe. He felt that the archetypes were what made up the content of our “collective unconscious.” These characters shared fundamental similarities across time and across geographies.

For example, the story of Achilles starts with his mother, Thetis, trying to make him immortal by dipping him in the river Styx. Unfortunately, she had to hold him by something — his heel. Thus, later in the Trojan War, he was killed when Paris shoots his arrow into his vulnerable heel.

In Germanic Nibelungenlied, we find a similar story of the great Siegfried, who as a young man fights the dragon Fafnir. Unfortunately for Siegfried, a Linden leaf happens to fall and cover the small of his back just before he kills the dragon, and Siegfried is bathed in its blood to become immortal. Siegfried later takes a fatal spear right in this spot.
The power of identifying a brand with one of these timeless stories is that the story already exists deep within our subconscious — it does not need to be created. The task for the brand is to simply evoke the story with cues. If it does this well, the brand will also evoke the emotion that consumers seek to derive from the brand.

These are the retellings of the universal story of the “hero.” All heroes share a vulnerability. Think of Superman and Kryptonite or Sampson and his hair. All cultures at all historic times have told the hero tale. Heroes are typically orphans called to a quest. The hero myth follows a very distinct story arc, regardless of the culture telling the story. Joseph Campbell described this phenomenon of the universal hero story masked by local details in his book *Hero with a Thousand Faces*.

Archetypal stories like the “hero” story have existed through the ages because they deliver on very important emotional needs we all share. The hero story helps us understand our mortality and speaks to our desire to achieve great things. Such timeless stories bring understanding and meaning to our lives.

In his work, Jung identified seven of these archetypes, but said there were many more to be discovered. In their work, *The Hero and the Outlaw*, Margaret Mark and Carol Pearson expanded this thinking to identify twelve specific archetypes and showed how these could be used to guide brand strategy. The power of identifying a brand with one of these timeless stories is that the story already exists deep within our subconscious — it does not need to be created. The task for the brand is to simply evoke the story with cues. If it does this well, the brand will also evoke the emotion consumers seek to derive from the brand.

**Archetypes’ Power**

Here are a few things we have learned about the power of telling an archetypal story with a brand.

**Brands that consistently tell one archetypal story perform better financially.**

Mark and Pearson cite a study they conducted with Stern Stewart, which demonstrated that brands closely
Using Archetypes... CONTINUED

associating themselves with one of their twelve archetypes had a significantly higher economic value added over the six-year time frame than brands telling either no archetypal story or multiple stories.

For instance, without their brands' packaging, Coke and Pepsi could be seen as basically selling carbonated sugar water with cola flavoring. However, as we all know, both brands have built distinct, powerful identities supported by years of marketing and advertising.

Coke has done a masterful job of staying unwaveringly true to the archetypal story of the “innocent” (a story of optimism, hope and a desire to be virtuous). On a functional level, Coke stands for refreshment. But on a deeper emotional level, Coke’s alignment with the innocent story helps its fans believe there is an innocence and virtue about the brand. In each Coke ad, from the hilltop singing of “I’d like to teach the world to sing,” to Mean Joe Greene sharing a jersey, a Coke and a smile, to the polar bears, to the latest campaign of “Open happiness,” Coke has consistently told the innocent story.

Pepsi, on the other hand, has strayed in the past two years from its archetypal “jester” story (a story of spontaneity, fun and living in the moment). For years, Pepsi ads always had a humorous twist (e.g., Ozzy Osborn becomes Donny Osmond) or singing and dancing (from Michael Jackson to Britney Spears). This brand strategy helped them maintain the number two spot in the category for two decades. Recently, Pepsi has departed from this path and tried to be more like Coke, with its “Refresh everything” project, focused on a grassroots philanthropy that has led to significant market-share losses. This past March, Ad Age declared, “Pepsi has lost the cola war,” after it fell to third place in market share behind Diet Coke’s share.

Brands stray from their original archetypal story at their own peril.

For two decades, Target has been nipping away at Walmart’s share of the market. Target has consistently marketed its brand as a stylish, innovative and cool place to find common household staples — repeatedly telling the archetypal story of the “creator.” When Walmart opened its first store in Bentonville, Arkansas, it adhered to an archetypal story embodied by its founder Sam Walton — the “regular guy” — a story about accessibility and unpretentiousness. It espoused a belief that nobody is better than anybody else.

As Walmart grew, the management team forgot its core story. Walmart became the largest company in the world, and a large group of disgruntled consumers decided that the company was not a regular guy, but rather was acting out the dark side of the “ruler” story by bullying communities and vendors and running small retailers out of town. Fortunately for Walmart, its marketers discovered this error just before the economic downturn of 2009, and they successfully relaunched the brand with a new visual identity and a “regular guy” tagline of “Save money. Live better,” resulting in a very strong sales rebound.

Sometimes, the archetypal story is not obvious.

Understanding the underlying archetypal story takes a careful analysis and understanding of the emotional connection that the brand has established with its consumers. It would be easy to assume that Apple is telling the “creator” story, given the brand’s use by creative types and its track record of amazing innovation. When you dig below the surface, though, it is clear that Apple, at its core, has always told the story of the “rebel.” It is a brand about challenging the status quo and changing it.

From the “1984” big brother spot that ran once on the Super Bowl, to the taglines of “Think Different” and “The Computer for the Rest of Us,” Apple has always understood that its brand was about taking a different path than the crowd. Even the logo, which shows not just an apple but an apple with a bite out of it (Eve’s first act of rebellion in the Garden of Eden), subtly reinforces the rebel story.

A rebel needs a “ruler” against which to rebel. In the early years, IBM played this role for Apple, but for the past two decades, Apple has brilliantly positioned Microsoft/PC into this role. The “I’m a Mac” campaign, which brought to life the anti-establishment Apple brand personality, was recently named “Campaign of the Decade” by Advertising Age and has helped make Apple the world’s most valuable brand.

The task of an established brand is to discover and clarify its core archetypal story.

It is always amazing to me how little institutional memory exists in most big marketing companies. Many of the young brand managers have no idea of the story of how the brand came to be, what fundamental consumer need it addressed or even how the brand got its name. When you conduct interviews and dig into the historical files of well-

Psychological interviews and their projective techniques are essential because we need to discover the core emotional benefit that these fans derive from the brand, and consumers often cannot tell us or are hesitant to tell marketers their true reasons for buying a brand.
established brands, you will invariably find meaningful nuggets from the brand’s founding.

Often, the brand remains a perfect reflection of the forgotten philosophy of the brand’s founder. Consumer perceptions of brands change quite slowly, so it is always enlightening to go back to the earliest TV campaigns to see what the original “imprint” of the brand was.

Recent work with the Lubriderm brand showed that consumers had a deep memory of the alligator used in the early campaigns with the tagline, “See you later, alligator.” Even though these spots had not run for over 20 years, this was the primary memory that consumers retained of the brand because it struck a deep emotional chord.

The task of new or undefined brands is to identify an archetypal story and stick with it.

For a new brand, archetypes can be extremely helpful in establishing the underlying emotional need and the guardrails for how the brand tells its story. Half the value of using archetypes to guide brand strategy is that the marketers align around a single story, rather than trying to tell several.

The key to selecting the right story is to conduct the projective qualitative research to understand consumers’ emotional needs in the category. Once the emotional need is identified, the team should select the archetypal story that delivers this need (e.g., if soup purchasers ultimately want to feel nurtured, the “caregiver” story delivers on this need—a story Campbell’s tries to own).

The other key consideration is how competitors have positioned themselves and whether or not they own a relevant archetypal space. If so, you have two options: (1) outspend them and try to usurp the archetypal story, or (2) pick a different story.

Archetypal brand-building starts internally.

Companies like Johnson & Johnson, Eli Lilly and Rawlings use the power of archetypes to build their brands. These strong brands are built from the core. If the senior company executives and brand leaders do not grasp the fundamental essence and emotional appeal
DRIVING RESEARCH TRANSFORMATION

AMA Research & Strategy Summit 2011  Sept 11-14  |  Orlando, FL

Research is undergoing a major transformation. That's why the AMA's Annual Marketing Research Conference has a new name and a new focus. With the role of research expanding to include driving strategy and informing critical business decisions, we're bringing together the brightest minds in research for elevated discussions and planning. We'll examine integrating new and existing technologies and methods; the expanding role of research in your organization; the impact of these changes on your career; and the future of research.

Featured speakers:

Tony Palmer
Senior Vice President & Chief Marketing Officer, Kimberly-Clark Corporation

Professor Byron Sharp
Director, Ehrenberg-Bass Institute for Marketing Science, University of South Australia

Kay-Yut Chen
Principal Scientist, Hewlett-Packard

Ian Lewis
Director, Research Impact Consulting, Cambiar LLC

Sumita Singh
SVP, Global Head of Customer Knowledge Management, Thomson Reuters

Jeffrey Mercer
Ph.D., Director of Market Research, Microsoft

Learn more at MarketingPower.com/Research

Register Today

Save $100 when you register now!

<table>
<thead>
<tr>
<th></th>
<th>Before 8/11</th>
<th>After 8/11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member</td>
<td>$950</td>
<td>$1,050</td>
</tr>
<tr>
<td>Non-Member</td>
<td>$1,210</td>
<td>$1,310</td>
</tr>
</tbody>
</table>

Platinum sponsors:

Sponsorship opportunities available.
Contact sales@ama.org
of the brand, it is difficult for the frontline employees to deliver the right brand experience, and it is particularly hard for consumers to connect emotionally with the brand.

Therefore, start with the core team of a company and brand, conduct interviews with the key executives and do a deep dive into the history of the brand. Administer a survey to all the employees familiar with the brand to better understand which archetypal stories they believe could be true for the brand. This is an essential part of the process because, ultimately, the brand story around which your team aligns needs to be true. The company should be able to deliver on this story with its products and services at all the key brand touch points.

With this understanding, conduct a series of in-depth interviews among the brand’s most devoted fans. These are the consumers who have the strongest emotional connection to the brand. I recommend conducting these interviews with a trained consumer psychologist. Psychological interviews and their projective techniques are essential because we need to discover the core emotional benefit that these fans derive from the brand, and consumers often cannot tell us or are hesitant to tell marketers their true reasons for buying a brand. When was the last time you heard a Mercedes driver tell you that he or she chose the brand for its prestige and power?

Instead, consumers typically list the “rational alibis” for choosing the brands they use. It is simply human nature to assume that the decisions we make are based on rational thought processes, but think for a moment about how you went about buying your house or your car. Was it really a purely rational decision? Be honest! These interviews help us determine the key emotional needs and the most compelling archetypal story for consumers in a specific category.

**Brand Strategy Iceberg**

In the last phase of a project, make the key findings of the research actionable for marketers. I have developed a brand iceberg model (below) that has been very easy for clients to understand and for agencies to use as guidance. It is based on the idea that a large part of your...
brand is never seen by the consumer; it is below the waterline in our model.

**Below the waterline**
These are elements that all strong brands share.

- They include a *foundation story*, which helps employees (and sometimes consumers) understand why the brand came to be in the first place, what problem it was solving and what its reason for being was. A well-researched foundation story can often provide strong guidance and meaning for the employees or brand team.
- Strong brands have a set of *brand pillars*, which can be values or traits of the brand that have always been part of the brand and always will be. We like to limit these pillars to no more than five. Some of the pillars may be shared with competitive brands, but as a whole, they should differentiate the brand from any other brand.
- Strong brands also define their *brand personality*. Whether we like it or not, consumers will tend to personify brands they desire. Apple, which for years ran the “I'm a Mac” campaign, made it easy for consumers to understand the brand personality and to identify with it.
- Strong brands also define their brand *worldview*. This should be an inspiring belief statement — the brand’s take on the world. It should be a belief that is shared by the brand’s most ardent fans. It should be a worldview that permeates all aspects of the brand’s offering and communication.
- Finally, strong brands are able to internally articulate their brand strategy to their employees in a memorable way in just two or three words — a *brand promise*. The brand promise is always an internal mantra. It should never be used in the external communication of the brand because it lays bare the emotional strategic intent of the brand. Let your advertising agency help you develop a compelling tagline that brings this strategy to life in consumer language, but keep the brand promise internal. I often like to explain the brand promise as what the consumer actually gets, emotionally, from the brand. For example, Nike sells shoes, but their brand promise is “authentic, athletic performance.” Hallmark sells greeting cards, but their brand promise is “caring shared.” Notice that these promises are just a few words and anchored by a noun. This is the emotional benefit that their consumers get from the brand.

**Above the waterline**
Above the waterline are the key elements of your brand that consumers experience. These include things like:

- a brand’s *product or service* and how well it delivers on the story
- the *iconography* of the brand (e.g., logo, smell, sound and feel that your brand owns)
- the *personification* of the brand, whether it is a founder (e.g., KFC), a character (e.g., Tony the Tiger) or an association with a celebrity (e.g., Nike and Michael Jordan)
- the *tagline or language* you use to voice your brand (e.g., on the website, in your ads, on Facebook)
- rituals associated with your brand, like the way you order your Starbucks coffee and then step to the end of the row and put the sleeve on it
- the brand’s *rational alibi*, or the reason a consumer might justify her purchase to a friend (e.g., the “No More Tears” formula in Johnson’s baby shampoo)

**Final Thoughts**
In summary, strong, iconic brands evoke a timeless archetypal story. This story connects them emotionally with their fans. Brands keep the story relevant by retelling it over and over again in fresh, contemporary ways, and they pay attention to the details of the story because the little things a brand does often matter much more than any big thing a brand says. They are fanatical about the consistency with which they tell the story because it is easy for the spell of the brand story to be broken if even minor details are out of sync with the story that consumers have come to know and trust.

Archetypal branding works because it appeals to us as humans. We all share a deep need to feel stability, belonging, discovery and achievement. As the runner who on a cold morning laces up her Nike shoes to go for a jog because she wants to “just do it” in today’s world, our brands have taken on the role of important props in our own personal mythologies.

Archetypal branding works because it appeals to us as humans. We all share a deep need to feel stability, belonging, discovery and achievement.
Focus groups
- 5 award winning rooms
- Extra-large spacious client suites
- Multi-functional rooms accommodating up to 75
- Living room, separate work stations & taste tests
- Computer labs with 25 stations
- In-house data management for real-time labs
- Top-rated catering for every palate
- Focus Vision
- 2 senior consultants with over 44 years of qualitative experience
- Online focus groups & bulletin boards

In-house recruiting
- 40 station recruiting centre
- In-house database, cold calling, and client lists
- Local, North American and multi-country project management experience and partners
- Consumer, youth, children, seniors, medical, ethnic specialty, business professionals, ethnography, specialty panels, real time recruitment and real time interviewing
- Methodology and screener development
- Validation, monitoring and extensive recruiter training
- Qualitative online panel

FOR MORE DETAILS, PLEASE CONTACT:
GINI SMITH  416 544-3022
GINI.SMITH@RESEARCH-House.CA
LINDA LANE  416 544-3004
LINDA.LANE@RESEARCH-House.CA
1 800 701-3137
WWW.RESEARCH-House.CA
In operation for 40 years, Mountain Equipment Co-op (MEC) operates Canada’s largest retail consumer co-op, with nearly 3.5 million members. Our outdoor-recreation focus is on supplying our enthusiasts with gear to get outside and have fun. If you are in the United States and not familiar with Mountain Equipment Co-op, we most closely resemble REI (Recreational Equipment, Inc.). However, unlike REI, we are owned by — and sell only to — the members of our co-op. MEC operates in the two Canadian official languages, English and French.

Since we are a co-op, we are truly member-centric, and while MEC is not a non-profit, our mandate is not to maximize profits, but to earn a modest profit to invest in the business and remain sustainable. As a co-op, we are here to “serve the needs” of our members, not “create” needs for them. This type of business model creates a unique, deep-rooted culture, which can often be described as “anti-corporate.”

Why a Community Panel
Along with the positive attributes of a deep-rooted, outdoor-enthusiast culture — such as passion and dedication — can come a few challenges. The staff also being members, they tend to be highly invested in the business, but at times they operate with a little bit of tunnel vision. This is one of the reasons MEC did not have a formalized research department for the first 35 of the 40 years we have been operating.

So, we chose a community research panel for its ability to reach beyond the staff’s ideas and tap into mainstream members’ perspectives. As we grow and become more diverse, adding new markets and expanding our lines of business, it becomes increasingly hard to imagine that we can continue to keep a close eye on the broader membership, and keep an objective perspective. We felt that a panel would be truly representative of the membership, so that we would be able to justify our decisions and directions to the full membership and internal stakeholders.

We also needed the results of our research to be timely, actionable and engaging, something that we saw as a distinct advantage of a community research panel.
panel. We did not want to create a research program that would end up with more “binders on a shelf.” Instead, we wanted to create dynamic research that could activate and engage our stakeholders by permeating throughout the organization in a way that binders never could.

The results of the community panel really breathe life into the data and create stories that stakeholders at all levels can relate to. And in a culture like MEC — where we have a lot of people who tend to be resistant to change or new ideas — we find that more dynamic, animated reporting allows us the opportunity to gain increased understanding of the research and, more importantly, the buy-in to move forward.

Finally, MEC runs very lean. As a co-op, MEC has a limited budget for advertising, marketing and research. We also have very limited people resources to manage that research, with only two individuals running our research program for a company with 3.5 million customers and $250,000,000+ in sales.

What we were looking for was a robust research solution, but without the robust cost, and something that we could easily manage almost exclusively on our own.

How We Use the Community Panel

Probably the greatest use of the community panel has been for our larger and more complex strategic studies. It is important to us that we get very clear direction and/or approval from our
Robust Research without Robust Resources CONTINUED

Keep in mind that your community may not be representative of the general population. For this reason, it will not be ideal to conduct any competitive intelligence or advertising-awareness studies.

members before moving into a new product category.

For example, MEC recently got into the business of designing and building our own branded bicycles. That was not a decision we wanted to take lightly, and again, as a member-centric organization, we needed to make sure that our members wanted us to get into that business and that they actually intended to buy the bikes we would produce.

To support this large and possibly risky move, we used our community panel to test the waters. In the end, we had overwhelming support from our members (over 85% in favor). We also learned a few unexpected things, such as where the concentration of opposition lay. Well-rounded findings, coming from the community panel, not only gave us the green light but also let us know where the yellow lights of caution were, so that we could plan accordingly.

We do many quick tactical studies, which we call “Insta Polls.” They are wide ranging, anything from fun studies on “Hey, where would you like us to place the logo on your favorite gear?” or “Where should we open up our next store?” to more significant questions such as asking for feedback on product enhancements or what members would like to see on our website.

The forums have been extremely valuable in complementing our larger quantitative studies. We found out that when we only surveyed the panel and did not include a qualitative piece, we had high dropout rates and/or that panel members would skip question areas because they were not informed on a topic or they would not know how to articulate their feelings on a topic. For example, we have occasionally needed to learn more on provocative or idealistic issues, such as ethical sourcing for a retailer or sustainability. Starting forum discussions in these areas has provided us more robust findings. We obtained a fuller picture through attaching a human aspect to the findings beyond just a bunch of numbers and a few verbatims. In the end, members become better informed on these matters, and we obtain the data needed to understand sentiments more fully.

Another use of the forums has been to execute iterative-moderated discussions, each with specific learning objectives identified for each round of the online forums. One example of this was a study where we sought insight into the motivators and barriers that exist within the youth population (in particular, ethnic youth) regarding interest in wilderness camping. We spoke to four distinct segments (teachers, recreation leaders, parents and young adults 18–25 years old) in three rounds of online discussion groups that took three months to complete.

The learning we gained from these discussions was tremendous, and at the end of these rounds, we invited eight of the most involved and chatty youths from the discussion boards to come camping for two days. These members were then asked to recruit a friend to bring along with them who was (a) not an MEC member and (b) someone who was reluctant to go camping. This achieved a mix of campers and non-campers to take part in a “camp-along,” which was used as a two-day “in-situ” focus group.

Since we were with the campers such a short amount of time (just two days and two nights), we used almost every moment to collect qualitative data, like diary writing, taking photos and videos, having the campers create scrapbooks, etc., as well as the spontaneous discussions that took place along the way (which, in some ways, proved to be the most valuable component).

One of the deliverable components was a 10-minute compilation “ethnographic” documentary video that was shared internally with stakeholders.

This “live” emotionally expressive video did more to dispel internal misperceptions about camping-resistant individuals than any research paper we could ever generate! It really seemed to bust through the tunnel vision and notions that our staff had about who these non-campers really are.

Lessons to Share

Report back to the members.

Annually, we create four newsletters that report back on items such as survey results and monthly gift-card winners. What we have found, however, is that what the members really want to know is what other members are thinking (e.g., “Am I the only one who thinks or feels this way?”). They also want to know how their input has made a difference to the business. As a co-op, we pride ourselves on being transparent, so there is very little that we consider confidential or that we elect not to share with our community members.

Additionally, if you go through the effort to create a newsletter, you need to make sure that people are well aware of its existence, so we include a link to the most recent newsletter in every study invitation that goes out. This tactic has really helped us increase awareness of the newsletter, which ultimately strengthens engagement within our panel community.

Keep in mind that your community may not be representative of the general population.

In our situation, we are specifically speaking to our co-op members, and if your community is only a composite of your customers, you may need to complement with external samples from time to time. For this reason, it will not be ideal to conduct any competitive intelligence or advertising-awareness studies.

Instead, you may want to use your panel in conjunction with an access
panel like Spring Board America or Angus Reid in Canada. You can run the exact same study in an unbranded format with a blind sample group that will then give you the voice of general-market opinion to add, merge or compare to your community panel.

**Carefully consider the number of open-ended questions.**

One of our biggest challenges is wading through and culling all the verbatims. Remember, we are a team of only two in the research department, so it is difficult to first read through it all and then to act on any of it. It is a great missed opportunity for us. Additionally, members expect that if they take the time to share their thoughts with us in writing, we in turn read them. It would be disappointing if our panelists were to learn that not all verbatims get read, and we do not want to disappoint them.

To manage this situation, we try to limit the number of open-ended questions in our surveys. This helps keep response rates and engagement up, without setting the expectation among members that we will act on everything that they have written. We also tend to have much higher response when the studies are short, light and fun!

**Use your community members’ feedback to help you better structure your studies.**

Our members kept asking us to provide them with a “back button” and a “progress bar.” So, we have done that. We are aware there are mixed opinions on this, so we use our discretion. There are times where we do not want to let respondents “go back,” as is the case for recall on creative. Generally speaking, though, we use member feedback to make the improvements that make things easier for them, and as a result, we have seen even better response rates.

**Participation is not always dependent on incentivizing your panel members.**

We do not rely heavily on incentives for ensuring participation from our community panel. Our members are motivated mainly because they want to have input and because we always report back on our findings; this keeps them engaged, feeling like they are contributing to the
direction of the business. Our response rates are 35% to 50%, and the only incentive we reward our members with is a monthly drawing for three $50 gift cards — not a huge incentive!

**Do not pretend you can do it all yourself.**

Hiring people to attend to the tasks you cannot manage will keep you from losing a good opportunity for learning. The insight gained from the camp-along surpassed all our expectations; however, it was an incredible amount of work and just beyond our available manpower. We had a crew of researchers, assistants and a videographer that came camping with us. They helped with everything from toting drinking water to securing risk waivers to video editing. A research consultant helped us with much of this, including moderating the online forums in the months prior to the camp-along. This study could not have happened without this external crew.

**Conclusion**

So, with the right audience and approach to your studies, success can be achieved without unlimited budgets and staff resources. Community panels can be a great replacement for or complement to your traditional research program, as they are dynamic and cost effective. Even with a lean team and budget, you can easily keep apprised of your consumers’ trends, gather insight to guide your business, take advantage of real-time opportunities to conduct ad-hoc studies and more. You can poll, chat, mine sentiment and survey your customers at will.

All these approaches complement one another. In fact, the ability to combine these methodologies is really what enriches a solid research program and has made using a community panel so beneficial to us. Yet, for a co-op business like MEC, the greatest benefit we gain is the confidence of membership approval and stakeholder buy-in to the decisions we make on their behalf.

*Editors note: Special thanks to Vision Critical for sharing its Panel Knowledge Series webinar content with us. Chapter 3, Panel Success Stories, highlighted Mountain Equipment Co-Op and was used, in part, for the creation of this article.*

---

**Meet your new navigators:**

If your destination is a venue in which to conduct successful focus groups on consumer products, advertising and concept testing — meet your new navigators, Decision Drivers can take you there — with no detours and a smooth ride.

With Decisions Drivers at the wheel, all your market research needs, including facility services, field management, screener creation and moderation are road mapped and ready to roll.

As an owner-operated facility, we are personally driven to providing each and every client with an exceptional journey.

When you need market research to help drive your product or service, let Decision Drivers navigate your way.

*We’ll drive you to success!*

**Decision Drivers**

[www.decisiondrivers.com](http://www.decisiondrivers.com)

**Navigators:**

Chris Driver

Jodi Lechner

Phone: (201) 391 0073
221 West Grand Ave
Montvale, NJ 07645
We want you to be successful

With over 50 years of experience Adler-Weiner Research has earned industry respect for excellence in recruiting, understanding clients’ needs and impeccable service. We are annually rated “One of the World’s Best” in the worldwide ranking of focus facilities by Impulse Survey. This independent ranking is based on recruiting, personnel, services, conference and viewing rooms, location, food service and value.

Our unmatched level of experienced recruiting provides our clients with confidence, comfort and trust. We believe these qualities are essential in building and maintaining relationships. Our executive and consumer recruiters attend ongoing rigid recruiting seminars and are monitored daily to ensure quality control. Our recruiting specialists have an abundance of resources to find accurate participants for your most complex project. We specialize in recruiting physicians, patients, business executives, and consumers. There is no project too large or too small. We are here to meet your needs and exceed your expectations. Our personal commitment and integrity make the difference!

ADLER-WäNER RESEARCH COMPANY

chicago 312 944 2555
lincolnwood 847 675 5011
los angeles 310 440 2330
orange county 949 870 4200

awres.com
FULLY IMMERSED:
Using Activities to Capture Consumer Behaviors, Context and Emotions

BY STEVE AUGUST
Revelation ■ Portland, OR

Traditionally, qualitative market research has been divided into two main types of research interactions: interview- or question-based research (focus groups, IDIs, etc.) and observational research (ethnography). Both of these approaches were developed for in-person, real-time research. An interviewer asks questions and follows up with probes. An ethnographer observes people engaged in their natural behaviors in their natural settings. Based on years of practice, researchers have established effective techniques to make the most of in-person, real-time research interactions.

As qualitative research has come online, the initial approach was to simply map existing methodologies and interactions to the new medium. However, these traditional approaches are less effective in the asynchronous online and mobile mediums, when a researcher is not immediately present and when the interactions take place over the course of days or weeks. Observation becomes clumsy via online methods, as it is not terribly satisfying to set up a video feed and wait for something to happen. The dynamic interaction of a live interview is hard to replicate online; even with video interviewing, something is lost. Repeated questions and answers tap only a fraction of the mediums’ potential and can get tedious over the course of several days or weeks.

To get the value and benefit of any asynchronous methodology, let’s
By layering behavior, context and emotion activities together, you can develop a deep understanding of consumer experiences, the kind of understanding that can move a business forward.

consider the strengths and interaction modes of the medium and then adapt our methods. For example, online and mobile give researchers unprecedented access to people’s lives through sustained engagement. Geography and time cease to be constraints. While online is a clumsy observational medium, it is a tremendous engagement and confessional medium. Couple this with the ability to post digital photos and videos, and you have the raw materials to capture consumer experiences in context as they occur. But how best to capture those experiences and their attendant insights?

This is where activity-based research comes in. Activities can be diaries and journals, projective exercises, mini-documentaries, representational photography, personification exercises and a myriad of other possibilities. They can be used to explore behaviors, environments and emotions.

Below is an illustration of the difference between a question-based approach and an activity-based approach to understanding the contents of a consumer’s refrigerator.

**Question-Based:**
*What’s in your fridge?*

**Activity-Based:**
*Take me on a photo tour of your fridge.*
As you can see, the activity-based approach provides a visual richness that the question-based approach does not. A great research activity will be engaging to participants, enable researchers to get to the heart of a research objective and produce a compelling deliverable. Designing engaging activities is both art and science. Often, the simplest are the most powerful and effective. By arranging a series of activities to capture multiple layers of consumer experience, we can immerse ourselves in people’s lives.

**Using Activities to Capture Consumer Experiences**

If we think about a consumer experience around a product or brand, we can broadly divide it into three distinct layers:

1. Behavior
2. Context
3. Emotion

OK, let’s try to make this more tangible. Here is an example of someone preparing dinner for herself and a friend.

**Behaviors represent actions.**

“I used my phone to text my friend at 4:30 to arrange dinner at 7:30. I was at the store to pick up food to prep. I stop at this store, as it’s on my way home and has the best quality.”

**Context represents the backdrop for the action, environments, processes, life events, etc.**

“I have a small apartment and an even smaller kitchen, so I have to arrange my space carefully, and I can have only one or two friends over at a time.”

**Emotion represents the underlying motivations and subtexts.**

“I use this old flour sifter. It actually doesn’t work very well, but it was my grandmother’s, and I feel connected to her. Now that I think about it, I stick with some of the food brands I use because I feel a connection to them—they are things I remember growing up.”

In immersive research, we can unlock the full dimension of the consumer experience by matching specific types of activities to the different layers of behavior, context and emotion.

- Behavioral activities typically are diaries and journals. They can be set up to capture the various specifics of behaviors, consumption and usage.
- Context activities are often photo or video tours and Show Me’s that capture environments and processes and show how an action fits into people’s lives.
- Emotional activities are often creative projective exercises that can be as simple as letter writing, or they can use imagery and metaphors to get deeper emotions.
**Context**

- Tours, Show Me’s,
- Deprivations

**Behaviors**

- Diaries, Journals

**Emotions**

- Projective Exercises,
- Image Metaphors,
- Personification,
- Storytelling
By layering behavior, context and emotion activities together, you can develop a deep understanding of consumer experiences, the kind of understanding that can move a business forward.

Capturing Behaviors via Activities

When we want to capture what consumer behavior actually happens, our go-to activities are diaries. There are actually four types of diaries, and each type captures different aspects of consumer behaviors. Let’s dig into these a bit deeper.

**Usage Diaries**
These focus on how a consumer interacts with a particular object: a phone, a piece of software, an appliance, food or beverages (consumption is type of use), etc. You could even say a diary of a day at an amusement park would be a usage diary on how the consumer is using the park. With usage diaries, the data capture is around the moment of use — the what, when, where, why and specifics of the use. If a product has multiple types of uses (i.e., a smartphone), then you will want to capture the dimensions of the use that are pertinent to your research question.

**Spotter Diaries**
These focus on capturing people’s encounters with things out in the world: brands, categories, foods, advertising, etc. In this case, the diary is less about behaviors per se, but more about understanding the presence of things in a person’s life. A specific example of a spotter diary would be to have participants post a picture and a description of where they encountered a particular brand on a given day. Imagine the brand was Apple, and they posted entries of seeing people with iPhones, someone using a Mac at a cafe or a news story about Apple they saw online.

**Process/Purchase Diaries**
These focus on things that often evolve over time versus around a specific use: the rhythm of laundry in a household, preparing a tax return, buying a car. Often when someone makes a significant purchase decision, they go through a process: they will research, talk to their friends, see ads, go to stores. It unfolds over time, and you need the whole narrative to understand the behaviors.

**Behavior Diaries**
These are more open-ended explorations and may not be focused on a particular object, category or process. They do tend to focus on a topic — for example, hair-care habits over the course of a week or month. A hair-care diary could encompass tools,
consumables and going to a salon or barber. The goal is to get the whole picture of consumer behaviors around the topic.

**Getting the Context**

Of course, consumer behaviors do not exist in a vacuum. Behaviors occur within the context of people’s lives — their processes, beliefs, environments and day-to-day life. Contextual activities fill in the backdrop in which behaviors occur. Contextual activities include:

- “Tours,” which tend to focus on physical environments, like the refrigerator example above. They can use photos or videos to bring to life the physical context of a particular behavior.
- “Show Me’s,” which concentrate on understanding how people do the things they do. This activity often has people describe, step by step, their process for accomplishing something. How someone does their laundry or makes their coffee would be good examples of “Show Me” activities.
- “Getting to Know You’s,” which focus on learning more about the participants themselves as part of the context for understanding their behaviors and emotions. They also make good warm-up activities.
- “Deprivations” are a powerful way to understand what a product or service means to a consumer. In a deprivation activity, the researcher instructs the participant to go for a prescribed duration without using the product or service and record the impact. An example of a deprivation activity would be to ask consumers to go a day without using their mobile phones.

**Getting to the Heart of Emotions**

Emotions are the subtext to consumer experiences. If we can read the emotions, we can crystallize understanding of how people relate to their world. Some good emotional activities are image metaphors, personification and storytelling.

Emotions are often extremely difficult to put into words. As Gerald Zaltman described in *How Customers Think*, using images as vehicles for metaphors are a powerful way to help people access their emotions. A simple metaphor activity might ask participants to post an image that represents a particular product, brand, service or life event.

In personification activities, participants are asked to describe a series of events from the perspective of the product or object, rather than from their own perspective. An example of a personification activity is asking participants to describe a day in the life of their computer from their computer’s point of view. This seemingly small twist often elicits strong emotional content, as participants tend to transfer their emotions on to the object.

Storytelling can also be a powerful conduit to deeper emotions. The key is how you set up the exercise. A good example of setting up a storytelling exercise is to introduce with the sentence, “Tell me about a time when you were surprised by...”

**Activities: the Beginning of the Conversation**

These are just a few examples of activities that can get participants to open up in surprising and effective ways. Of course, the activity itself is just the start of the conversation. Once a participant opens up through the activity, there is ample opportunity to probe for more depth and clarity.

With new mediums come new opportunities to add to the qualitative research toolbox. By adapting skills and techniques to take best advantage of online and mobile technologies, immersive activity-based research can be a powerful tool to understand consumer behaviors, context and emotions, while ultimately answering key business questions.

---

**J.S Martin Transcription Resources**

Jay Martin
11042 Blix Street
West Toluca Lake, Ca 91602
Email: jay@jsmartintranscription.com
www.jsmartintranscription.com
(818) 691-0177 • Fax: (818) 761-7120

**FIELD&FOCUS**

Premier Palm Beach County Facility
Focus Groups & One-on-One Interviews
Expert Recruiting to your Exact Specifications
Emphasis on Quality and Performance
Active Group On-Line Viewing
4020 S. 57th Avenue - Suite103 • Lake Worth, FL 33463
E-MAIL: fieldfocus@field-n-focus.com • 561-965-4720 • FAX 561-965-7439
One of the main goals of global market research is to find commonalities among far-flung consumers, so that brand and positioning strategies can be designed with as little local variation as possible. Clients want to find the single magic formula that will hook customers around the world. Yet, it is the researcher’s job to uncover meaningful disparities as well as similarities among national markets, even if it makes everyone’s life a bit more complicated. National differences may be inconvenient, but they also offer opportunities for profit — and ignoring them can be costly.

For global pharmaceutical market researchers, navigating such differences is especially complex. To begin with, clients often underestimate the challenge of distilling arcane scientific concepts into positioning statements that can be understood worldwide. Not long ago, for example, our company was hired by a U.S.-based global pharmaceutical firm that was about to launch a new cancer medication. (Details of this and other case studies have been changed to preserve confidentiality.) The drug’s mechanism of action involved infiltrating cancer cells in a novel way, and the advertising team proposed using an espionage metaphor to describe it: “The first-ever double-agent targeted drug.”

The pharma company’s market-research department enlisted us to test reactions to several positioning statements, including one using this metaphor, among oncologists in the United States and the top five European Union countries. We contacted our teams of
marketing researchers in those countries, and we sent them a lexicon of the scientific terms contained in the statements. Sensing that it might be particularly difficult to interpret the phrase “double-agent targeted drug,” we telephoned the teams’ translators and went over the concept.

When we sent the translations to the company’s European affiliates for review, however, they were baffled. “Double agent” is an espionage term, not a medical one,” they told us. “Your translators must have made a mistake.” It turned out that the folks at U.S. global headquarters had not briefed their overseas colleagues on the marketing concept to describe this new mechanism of action (MOA). We had to go back and ask the client to explain the idea to the affiliates. This added delays and costs that could have been avoided if the client had consulted the affiliates in advance.

Then we did our fieldwork. In the U.S., most of the doctors we interviewed easily grasped the link between espionage and the drug’s mechanism of action. In the E.U., though, doctors either objected to the phrase “double agent” as unscientific, or they simply scratched their heads. The phrase clearly lacked global appeal, and we recommended that the positioning statement containing it be dropped.

The takeaway? Positioning concepts should be developed with a global audience in mind, and affiliates need to be fully informed by global headquarters on new marketing concepts before they reach the research stage.

Navigating Cultural Differences
People in different countries do not just think and speak in foreign ways. They may act differently, as well — and such cultural quirks can profoundly affect both the research process and its results. Recently, for instance, a mid-size U.S.-based firm asked our company to research market conditions in the United States, Germany, France, Italy, Spain and Japan for a drug to treat a metabolic disorder linked to cardiovascular disease. In all those nations, we quizzed patients about their diagnosis, the impact the disorder had on their lives, how their current medication was working and what kind of drugs might better suit their needs. We asked physicians about their patients, the treatments currently available and the ways that future medications could be improved.

We did not, however, conduct all the interviews in the same way. In the U.S. and Europe, we spoke with groups of three or four people — a setting that, among Westerners, tends to encourage frank and revealing conversations. We videotaped these sessions for later review. In Japan, though, we knew that people are often reluctant to share personal experiences in a group and that videotaping would be considered an invasion of privacy. Instead, we asked questions one-on-one and took notes.

When it came to the answers, the biggest surprise came from western Mediterranean countries. Elsewhere, patients seemed to fall into two categories: those whose metabolic disorder had a strong genetic component, and those whose daily dietary habits were primarily to blame. In France, Italy and Spain, however, many patients attributed their problem to weekend parties, a pattern the physicians also reported. This group, which we labeled the Revelers, would eat moderately most days. Three or four times a month, however, they would join friends for an evening of joyful gluttony and alcohol consumption. Those sporadic blowouts led to chronic health troubles.

Initially, the drug company’s marketing team was reluctant to include the Revelers in its positioning strategy. Our quantitative research, though, subsequently indicated that this segment accounted for almost 10% of patients in three target countries, too large a minority to be ignored.

Assessing the Medical Environment
The global pharmaceutical market researcher must also grapple with each country’s unique medical environment — that is, with the ways in which political, institutional, epidemiological and economic factors influence market conditions in different corners of the world.

One important consideration is the reimbursement climate. In Great Britain, for example, the National Health Service refuses to reimburse cancer patients for treatment with the antiangiogenesis drug Avastin, citing insufficient evidence that its benefits justify its lofty costs. Although this therapy is widely prescribed in other countries, few British patients have access to it. So, if a manufacturer hopes to market a medication with a similar mechanism of action in the U.K., it will have to convince regulators (as well as oncologists) that its cost-benefit ratio is significantly superior to Avastin’s.

In the European Union, on the other hand, regulators have approved two kinds of tyrosine kinase inhibitor (TKI) for metastatic non-small-cell lung cancer — Tarciva and Iressa — while only Tarciva is approved in the United States. While both drugs have a similar mechanism of action, European regulations stipulate that Iressa should be used as a first-line treatment; Tarciva is approved solely as a second-line treatment. In the U.S., where Iressa is unavailable, Tarciva is approved as a first-and second-line treatment. Woe to a pharma company that tries to market a competing TKI globally without taking those differences into account.

Yet manufacturers do sometimes design global marketing strategies before adequately investigating such
issues. A few years ago, our company was approached by a small biotech startup whose first product was a drug to combat a rare blood cancer. The enthusiastic leadership team, eager to sell their discovery, hired us to interview key opinion leaders to determine which physicians should be targeted. We learned that in the United States, a patient suspected of having this type of cancer is typically referred to a community-based oncologist by his or her general practitioner for diagnosis and care. Because the disorder is fast moving and difficult to control, the specialist often ends up quickly transferring the patient to an academic hospital where more treatment options are available.

Based on our findings, the commercial team drew up a physician-targeting plan aimed at community oncologists, not only in the U.S., but also in seven European countries. The team established partnerships with European marketers to support the promotion of the new treatment. Then the company asked us to interview medical experts in Europe about patient-referral patterns there, just to confirm that the strategy was valid.

In Germany, we found, referral patterns matched those in the U.S. In France, Italy, Spain, Belgium, Austria and the Netherlands, however, things were different: GPs sent patients suspected of having this particular disorder directly to academic hospitals. Community oncologists were seldom involved.

The client’s team responded with consternation. If our report was correct, it meant they had wasted time and money on a flawed targeting plan; worse, they would have to admit their mistake to their foreign partners. Yet further research confirmed our initial findings, so the team had no choice but to revamp the strategy.

Fortunately, the company went on to achieve a successful launch. Its team also learned a valuable lesson — pharma marketers need to understand the specific medical environment of each target country for their product.

In global marketing, it is always best to act on data, not assumptions. To quote a French proverb, “Il ne faut pas vendre la peau de l’ours avant de l’avoir tué.” Or in plain English, “Don’t count your chickens before they’re hatched.”

The global pharmaceutical market researcher must also grapple with each country’s unique medical environment — that is, with the ways in which political, institutional, epidemiological and economic factors influence market conditions in different corners of the world.
Shifts in qualitative diary work have been enabled by “newqual” approaches, including online, video, audio and mobile formats, which leverage technology to get closer to the actual consumer experience.

Qualitative researchers have long considered diaries a useful element for insight gathering. Traditionally, respondents wrote their entries in notebooks provided by the researcher and then mailed the completed notebooks to the researcher for analysis or shared them during a subsequent in-person interview. Today, it is increasingly common to have respondents execute qualitative diaries without handwriting any notes at all! Additionally, the diary information collected can be viewed (or listened to) almost immediately after it is collected, allowing for much-more-rapid learning, as well as for on-the-fly changes to data collection. Both of these shifts in qualitative diary work have been enabled by “newqual” approaches, including online, video, audio and mobile formats, which leverage technology to get closer to the actual consumer experience. In this article, we share some of our experiences with each of these newqual formats in the hope that it will stimulate you to toss out the old notebooks and get online instead.

Uses of Diaries
Fundamentally, qualitative diaries are used to better empathize with consumer experiences and to gain a deeper, more granular understanding of behaviors, motivations, emotions and unarticulated needs over a period of time. The range of common qualitative applications that we will discuss include the following:
- Capturing the details of behaviors of interest, especially to supplement recalled or claimed behaviors.
- Observing the use of a product or service, including drivers of (or barriers to) influencers, tradeoffs, satisfiers/dissatisfiers, etc.
- Sensitizing respondents to a topic before “going deeper” in a subsequent one-on-one interview or even possibly a group discussion.
- Gathering “stories” that can be used as the basis for communications, strategic positioning or new-product insights.
- Simply “bringing the consumer to life” as a foundation for greater empathy.

Technology, Transparency and Reach
Consumers today are openly recounting their lives on Facebook and YouTube in a diary-like fashion, including sharing stories and snippets that relate to many classical diary topics. Already, 48% of the U.S. population posts snapshots...
capturing their daily lives on Facebook. Many post pleasant musings, like praise for a favorite restaurant or movie. It is common for people to share more intimate moments in their lives, including videos highlighting a growing child’s accomplishments. Many also share more introspective reflections, like their latest views on work-life balance. This increasing comfort with personal transparency online has afforded qualitative researchers a new method for gathering deep and rich information about personal routines and emotions.

This comfort with transparency is not restricted, however, to just the online environment. Rather, it extends into the mobile environment. It is staggering to realize that 98% of Americans have a mobile phone (many with picture/SMS and video capability), 30% of which are smartphones with email and web-surfing capabilities. This functionality allows people to capture and share what is happening in their lives from wherever they are — and in an increasingly media-rich way.

Newqual platform providers in the past year have sought to tap into this trend by allowing researchers to leverage the range of communication technologies on mobile devices — SMS, MMS, video, email, web-based, app-based and voicemail. With the permeation of technologies that encourage us to capture and share our lives, evolving the traditional qualitative research diary to follow these trends seems not only natural but also essential.

### Online Diaries

Among the newqual diary formats, online diaries are the most popular. Online diaries, which sprang from personal blogs, pre-date the other newqual formats.

Online diaries are a good choice when there is a long series of specific questions for each entry (i.e., too tedious to answer by audio, mobile or video). They also are appropriate when there is a need to capture imagery (such as photos and online images) with the written entry.

Online diaries are usually set up in one of two ways, with the researcher providing either (1) one or two sentences of direction that allow participants to elaborate and share as much or as little as they would like or (2) a specific set of questions to answer for each diary entry. Either way can be effective, depending upon the diary objectives.

In the former, participants write their blog entry from memory, ideally on the same day that the event occurred. This is less taxing for the participant, but it often lacks consistent details across entries and across participants. In the latter format (a specific set of questions), participants can be provided with note-taking pages that are printouts of the online questions, and they can be asked to record their answers “in the moment.” Participants later transfer these notes to the online site.

Online diaries are the one newqual format in which the old pen and paper are still a handy aid to data collection, and they facilitate the capturing of more details and improve the accuracy and consistency of responses. A successful application of an online diary we executed was studying wine-drinking occasions, where participants showed us a varied range of those moments over two weeks. They took a photo of each occasion, provided an emotional image to capture feelings in the moment and answered a series of questions detailing the who, what, where, when, etc. Both the photos and emotional images illuminated the rituals and motivations for the wine moments, fulfilling the desired level of detail for the client.

### Video Diaries

For decades, qualitative ethnographic researchers have video-recorded
consumers in their homes for hours on end. Videographers provided the equipment and expertise to professionally capture these in-home sessions.

Now, with smart phones, wireless webcams and handheld camcorders, it has never been easier for consumers to generate their own video. And, with the launch of YouTube in 2005, the popularity of making and sharing videos has skyrocketed. In fact, as of May 2011, YouTube is now the third most popular web destination, behind Google and Facebook. With this as a backdrop, self-recorded video diaries are now emerging as a popular tool for researchers.

Examples of research applications that are a good fit with video diaries include:
- a “Day in the Life of” activity
- longitudinal consumer behavior (typically one to two weeks)
- current product use
- home-use testing of new products
- deep-dive target profiling

Giving participants a video camera as part of their incentive is highly motivating, largely because of the novelty factor. Researchers can have respondents use their cameras at home, at work, on the go or while shopping to film different aspects according to what we ask. For instance, we have asked women to demonstrate how they make homemade queso (cheese), and we have used video diaries to study morning rituals involved with getting ready for the day. We have incorporated video diaries in projects to test product trial and reaction, and to “live” with brand lovers for a complete day in order to get a rich understanding of who they are.

Video diaries offer many key benefits: a practical and cost-effective way to learn over time and across geographies; high-quality data, including both verbal and nonverbal communication; and more detailed, expressive and reflective responses. Video diaries are also a user-friendly communication method for respondents (easier than writing), and clients can gather insights directly from the voice of the consumer via video reports or embedded clips in presentations.

Tradeoffs, though, do come with this approach. For example, video is not for everyone, so some respondents will opt out during recruitment. Additionally, the researcher may feel that the prospect
Possibilities will continually improve as the research industry focuses on the application of mobile technology; not only will more people be able to communicate in more ways, but also geo-location-based input and barcode scanning will continue to expand our possibilities with mobile diaries.

of analyzing and editing the quantity of video footage collected is daunting.

**Audio Diaries**

Audio diaries may be the least-used newqual format, possibly because there are few data-collection platforms to facilitate collecting, transcribing, probing and analyzing audio-diary entries. The platforms that are currently available allow respondents to record a voicemail from any phone. The platform provider transcribes the message within a few hours and then makes both the transcript and audio file available to the researcher and participant through a protected website.

Because they allow for easy elaboration, audio diaries are especially helpful for exploring emotional motivations and gathering stories in the natural voice of the participant. They can also be used where note-taking, photos or videos might be cumbersome or inappropriate (i.e., in the supermarket or a doctor’s office).

Participants typically are given a series of questions, in the form of a pocket-sized card or a short text message, to answer for each entry. They then are asked to answer the questions via voicemail.

In our experience, audio diaries are quite labor-intensive for the moderator because participants tend to need individual pointers from the moderator,
which calls for a good deal of participant oversight to ensure that voicemail content meets expectations. Additionally, because it is very easy for participants to elaborate in voicemails, it is not uncommon to receive messages exceeding several minutes in length, which may be transcribed into a full page of text each. Multiply that by all of the participants in a study, and a single moderator can be easily overwhelmed.

That said, we have had good results using audio diaries to go deep emotionally with consumers about experiences and their emotions before, during and after. It seems that the lack of bias and judgment afforded by an “anonymous” voicemail provides a safe space for sharing. And, over a longitudinal study, respondents tend to share more and more.

**Mobile Diaries**

People are on the move today, and mobile diaries give researchers the newest tool to go where respondents are to capture their occasion-based behavior and attitudes. By using their mobile phone (a device most people carry with them throughout the day), respondents can share real-time entries with us in the moment, wherever they are. No longer do they have to carry traditional paper diaries with them. They can take out their mobile phone at any time throughout the day to communicate via texting, email, voice messaging, an app or the mobile web, using written and spoken words, pictures and even videos. The media selection depends upon the participant’s type of phone and the technology platform chosen by the researcher.

The possibilities will continually improve as the research industry focuses on the application of mobile technology. Not only will more people be able to communicate in more ways, but also geo-location-based input and barcode scanning will continue to expand our possibilities with mobile diaries.

Despite the many communication options available with mobile phones, texting is still the most commonly used. However, these entries are posted to an online site where participants can choose to add longer, more reflective comments. The downside of this is that SMS text messages are limited to 160 characters.

Using camera phones, respondents can easily share pictures, which often say more than words. For example, in a study on teen spending behavior, we had teens submit (via their mobile phones) pictures and descriptions of everything they bought for a week. Then, in Week 2, we had them go online to respond to probes and answer additional questions.

We have also successfully used mobile diaries to glimpse Super Bowl-watching behaviors, to gather feedback from observers during youth lacrosse games and to get real-time reactions from in-store shoppers at the point of decision.

With mobile diaries, automated reminders can be sent to participants’ phones. This eliminates a common problem with traditional diaries: forgetting to make entries. Other benefits of mobile diaries include providing a quick and easy way for respondents to share in the moment, collecting actual behavior and feelings (versus relying on memory) and offering an unobtrusive data-collection method (people commonly talk on their phone while shopping, so pulling one out for research purposes blends in beautifully!). Perhaps the most important benefit of mobile diaries is taking us into consumer moments that typically are inaccessible to researchers.

**Wrapping Up**

Consider these various diary approaches to be helpful tools in our ever-expanding qualitative research toolbox. While each can be used on its own, we have found they work best when used in tandem with other methods as part of a hybrid research design. For instance, a study might begin with participants completing a mobile diary for a week before participating in an online immersive research interview, or by creating video diaries prior to focus groups.

By combining multiple methods on the same study, we are able to explore the topic more thoroughly and uncover insights that emerge from coming at the same topic from different angles. Another twist on these various diary formats is to assign them to multiple members of the same household in order to see an issue or occasion from different perspectives; this can give a more complete and realistic understanding of drivers, tensions and tradeoffs.

Thanks to technology and consumer acceptance, there are many better alternatives for exploring consumer attitudes and behavior today than the traditional pencil-and-paper diary!
The place to be in October!

QRCA 2011
WELCOME TO Fabulous LAS VEGAS NEVADA
Learn. Connect. Have Fun!

October 12-14, 2011
Venetian Palazzo
Las Vegas, Nevada

This year’s annual conference is even more fabulous than before!

We have the content you’ve been asking for and new, shorter session formats. And it’s all happening in the fabulous all-suite Venetian Palazzo, in easy-to-get-to Las Vegas, Nevada!

New this year: Our keynote event will be a Master Class: three leading qualitative research consultants – Pat Sabena, Judy Langer and J.R. Harris – will give a live demo, each conducting a live focus group, followed by questions and answers with attendees.

Visit QRCA.org/2011 for more information and to register online.
Eight Ways to BECOME A REFERRAL MAGNET

BY DORIE CLARK
Clark Strategic Communications • Somerville, MA • dorie@dorieclark.com

For qualitative researchers, there is no better way to win clients than through referrals. After all, who is going to pick someone to elicit sensitive customer information based on a Yellow Page listing or an ad on local cable? Clients rightly worry about wasting their money on ineffective solutions or providers that cannot deliver. Having a trusted colleague of theirs vouch for you takes the risk off the table. The conversation is no longer about your background or your credibility — it is about how you can get similar results for them. Referrals make the selling process dramatically easier because you are no longer “selling” — the customer is coming to you, eager to buy. How, though, do you obtain these elusive referrals?

Some professionals believe that quality work speaks for itself. If only it were so. Unfortunately, in a world teeming with competitors, you cannot afford to keep your head down and simply do a good job. If that is your strategy, an occasional referral might come your way by accident, but you are leaving money — gobs of it — on the table.

Instead, you need to actively pursue referrals. That does not mean you have to become a sleazy operator, constantly “on the make.” It does mean, however, that you need to develop a clear referral strategy that you feel comfortable implementing. Here are eight proven strategies to get you started.

#1. Give to Get.

This one may be the easiest for the referral-shy QRC to master. Train yourself to ask for referrals by giving them to other people.

The secret is to develop a “connecting mindset.” It is not often that someone says to you, “I really need a marketing strategy consultant. Who should I hire?” That may be obvious enough that you spit out the right answer (Dorie Clark, of course!). More often than not, though, you have to be creative and find the appropriate opening to be helpful. This is not

The more connections you make for others, the more they will want to pay you back, in a virtuous circle.
Having a trusted colleague of a prospective customer vouch for you takes the risk off the table. The conversation is no longer about your background or your credibility — it is about how you can get similar results for that client.

about foibling off a recommendation on someone — instead, it is truly providing value by making someone’s life easier. Your friend mentions how much she cares about the environment? Offer to connect her with the eco-friendly event planner you just met. A colleague is complaining about his aching back? It just so happens that you know an ergonomic consultant. The more connections you make for others, the more they will want to pay you back, in a virtuous circle.

#2. Do Folks Actually Understand What You Do?
You might assume that everyone knows what you do for a living. Odds are, though, that they have no clue (“qualitative researcher” is not quite as obvious as “fireman” or “astronaut”). Most people are too self-absorbed to clue in, so you need to make sure they get it.

One good strategy — in line with the “give to get” theory above — is to ask for clarification about what they do and who their ideal clients are, so that you can be on the lookout for them. That provides an excellent opening for you to clarify that you can help large corporations conduct focus groups, or the like.

#3. Ask for testimonials.
A great way to remind current and past clients how much they love you is to ask for a testimonial quote. It need not be anything fancy; two or three sentences should do. This forces your clients to focus on exactly how you helped them and what value you brought to their company, so you actually get their permission, of course) on your website and promotional materials, further building your credibility and reputation with potential customers.

#4. Brand Yourself.
Once your immediate network knows what you do, the next step is reinforcing your status in clients’ minds. (If they know you, they may well know five other qualitative researchers — why should they send you the business?) Your goal here is to establish expertise and ubiquity.

Expertise
Writing articles for media outlets and trade journals, publishing white papers, developing a robust and thought-provoking blog and/or speaking at conferences or business events are great ways to show potential referrers that you have unique insights and are the expert that others turn to. That makes you the “safe bet” when a client offers suggestions to a colleague.

Ubiquity
It is easy for busy people — and that encompasses almost everyone — to forget about you in the moment. Maybe their colleague wonders aloud why they cannot seem to get a better handle on their customers’ motivations; unless you are top of mind, however, that moment will pass by without you winning a referral.

How to fix this dire situation? Make sure you never drop off people’s radar screens — stay in touch through branding vehicles such as frequent blogging, e-newsletters or Twitter. This came in handy for me when, four years after I had last worked with a colleague, she called me up to ask if I would be willing to take on a last-minute project with a prestigious Fortune 500 client. We might have seen each other once (if that) in the intervening half-decade, but she was familiar with my current offerings and skill set through reading my monthly e-newsletter.

#5. Practice with a friend.
Asking for referrals — particularly if you have not done so much in the past — can be scary. It is pretty unlikely that your intended target will start yelling at you, or even reject you with a flat-out “no,” but that is cold comfort to your racing heart and clammy hands.

Get the kinks out early by practicing with a friend and role-playing different scenarios, so that you will be prepared for a variety of responses, from “I’ll think about it” to “Let me give you five names” to “I don’t really feel comfortable with that.” You want to have a graceful follow-up ready for any possibility.

#6. Create a schedule.
As Stephen Covey might say, it is easy to neglect the important in favor of the urgent. Unless you hire a coach, no one will make you ask for referrals. It seems so much easier to focus on the meeting tomorrow or the report for next week, or on picking a new photo for your computer’s wallpaper.

But you have to be disciplined because, frankly, it is a numbers game. The percentages will vary from industry to industry, but you will have to ask 10, or 100, or 1,000 people, in order to get one new client. That one new client, though, may pay for all the effort, many times over.

Create an outreach schedule, and stick to it. Whether that includes three “touches” a day, or 10 every Friday, and whether it is by telephone or email or messenger pigeons, you need to get it done.

#7. Prioritize your asks.
You probably know a lot of people, and you cannot contact them all at
Create an outreach schedule, and stick to it. Whether that includes three “touches” a day, or 10 every Friday, and whether it is by phone or email or messenger pigeons, you need to get it done.

Once (well, you can, but an email blast will not be that effective compared to phone calls or personalized emails). Start with current and past clients, and work your way out to other business associates who have seen you in action and can testify powerfully to the kind of work you do. Later on, you can ask your hairdresser and dentist for referrals. Why not? You never know which other contacts they may have.

**#8. Know what to ask for.**
Most people, if you have a good relationship with them, really want to help you. The problem is, they may not know how, so you need to guide them with very specific requests. Make it explicit what kind of value you bring and what kind of clients you are looking for. I tell folks, “I help companies build their brands and increase sales. So, if you know any business owners or high-level executives who might benefit from that, I would appreciate it if you could introduce us.”

If there is a particular way they can help, be sure to let them know. For instance, you might say, “Marianne, I understand your firm has regular professional-development conferences. I often speak to companies like yours about the best way to learn what your customers are thinking. Do you have advice on how I might be able to break in, or do you know anyone I could talk to about this?”

**Making Referrals Work for You**
“Sales” — and all its ingredients, like obtaining referrals — has a bad name in our society. That is your gain. If you practice these steps diligently, you will be ahead of the 95% of other qualitative researchers who know they should be doing it but let fear and trepidation get the better of them. Sales, really, is about providing value to people who need it. As long as you keep that in mind, you should never be afraid to ask whom else you can help.
The wonders of technology are ever desirable, but can be elusive. No one pursues the tools of research technology quite like Fieldwork. Need to do groups in Smallville, USA? Let our Fieldwork Anywhere team quickly turn any two rooms into a full-service focus group facility, in ANY city — with a life-size virtual mirror, video streaming, digital recording, recruiting, hosting, even snacks and Critters in the viewing area. Or let Fieldwork Webwork create a virtual facility — with webcams for far-flung respondents to take part in online groups, discussion boards/blogs, surveys and more. Our recruiting and dedicated support staff will ensure your project feels like cat’s play. If your research needs are feeling out of reach, click on fieldwork.com and let us sink our claws in.
As a sole proprietor or small-business owner, you need to understand how social media can help you build and manage your relationships. The likelihood is that your clients are active on one or more of these social media platforms, and to be competitive, you need to be there, too.

As a senior vice president of marketing at Diageo (maker of Smirnoff, Guinness and Captain Morgan), I first got involved in social media as a way to better understand the people who loved and drank my brands, primarily adults below 30. It was important to understand how this group socialized, communicated and got information, and I particularly wanted to understand their interaction with brands.

As I dug into it, however, I found social media to be helpful far beyond marketing planning. It gave me more immediate access to information, helped build stronger relationships and exposed me to opinions that challenged my thinking. As it became second nature, I also realized that social media could also be a real competitive advantage in building a personal brand or a small business.

As a researcher, you need to better understand the people your clients are often most interested in. Even more important, though, as a sole proprietor or small-business owner, you need to understand how social media can help you build and manage your business relationships.

We are all familiar with the statistics: Facebook has over 700 million members and counting, while LinkedIn and Twitter have surpassed 100 million. As early adopters, marketers tend to over-index on all of them. The likelihood is that your clients are active on one or more of these platforms, and to be competitive, you need to be there, too.

**Steps to Getting Started**

So, how do you get started if you are not there? Or, if you are, how do you take it to the next level? Here are five key steps to think about.

1. **Choose a single objective.**

   Like any good marketing plan, you need to start with a clear objective. Is your objective to be a thought leader in the industry? To prospect for client leads? To build and extend existing relationships? To partner with other people on projects? Each of these will lead to a different strategy. Resist the
urge to pick a couple, and focus your activity.

2. Identify your target audience, and pinpoint where those people are active.

Are you looking for marketers? Researchers? Thought leaders or influencers? Which social-media networks do they use? What is their engagement level? Will they be open to your messaging on that platform?

3. Clarify your brand positioning.

Identify what makes you unique and what you want to stand for in the marketplace. You should be able to describe that in three to four words. For example, Nike stands for “authentic, athletic performance.” Are you an expert in “consumer insights for healthcare innovation”? A “cultural ethnographer”? Do you “synthesize qualitative and quantitative research”? These words will define your value proposition and act as keywords for search.

4. Pick a channel you think you can stick with.

Each social network has its own etiquette, behaviors and rhythm. Spend some time on the three big platforms: LinkedIn, Twitter and Facebook. Like anything new, building your online presence will require a significant amount of time, but it is likely to replace several things you already do to network and build your business. Ultimately, it should make you more efficient.

5. Experiment.

Once you have mastered a single channel and are starting to build scale, it is time to add a second channel to broaden your reach and deepen relationships. It can be one of the big three or a smaller platform like Quora if you specialize in technology or Tumblr if your category is substantially visual (food and fashion have large followings here).

The Big Three Platforms

LinkedIn

As a businessperson, your first step should be to actively participate on LinkedIn, which was specifically designed to build professional connections. The issue is how much time

Experts recommend no more than 20 tweets per day. I average 6 to 12, and I schedule most of them throughout the day to avoid audience fatigue and to better manage my time.
Like any new skill, social media takes time to learn, but I believe it is an investment that is well worth making. Just half an hour a day can start to make a real difference over time.
# Usability & Eye Tracking Labs with Technician, Anywhere, Anytime

<table>
<thead>
<tr>
<th>State</th>
<th>Labs and Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATLANTA</td>
<td>Delve Focus Pointe Global Fieldwork Atlanta Murray Hill Center South Plaza Research Schlesinger Associates Superior Research</td>
</tr>
<tr>
<td>BOSTON</td>
<td>Focus Pointe Global Fieldwork Boston (Wattham) Performance Plus Performance Plus (Framingham) Schlesinger Associates</td>
</tr>
<tr>
<td>CHICAGO</td>
<td>AIM Schaumburg Adler Weiner (Downtown) Adler Weiner (Lincolnwood) Delve (Oak Brook) Fieldwork Chicago (Downtown) Fieldwork Chicago (North) Fieldwork Chicago (O'Hare) Fieldwork Chicago (Schaumburg) Focus Pointe Global Focuscene (Downtown) Focuscene (Oak Brook) Focuscene (Oak Park) Murray Hill Center Plaza Research Schlesinger Associates (Downtown)</td>
</tr>
<tr>
<td>FLORIDA</td>
<td>Concepts in Focus (Jacksonville) L&amp;N Research (Tampa) MARS Research Ft. Lauderdale Plaza Research (Tampa) National Opinion Research Miami Schlesinger Associates (Orlando) Superior Research (Tampa) WAC (Ft. Lauderdale, Miami)</td>
</tr>
<tr>
<td>MINNESOTA</td>
<td>Ascendency Research (Minneapolis) Delve (Minneapolis) Fieldwork Minneapolis (Edina)</td>
</tr>
<tr>
<td>MISSOURI</td>
<td>Delve (Kansas City) Delve (St. Louis) Hatch Research (St. Louis) Peters Marketing Research (St. Louis)</td>
</tr>
<tr>
<td>NEW JERSEY/NORTH CAROLINA</td>
<td>AIM Hackensack AIM Morristown Fieldwork West (Fort Lee, NJ) Focus Pointe Global (Teaneck, NJ) Meadowlands Consumer Center (Secaucus, NJ) Plaza Research (Paramus, NJ) Schlesinger Associates (Edison, NJ)</td>
</tr>
<tr>
<td>PHOENIX</td>
<td>Delve (Tempe) Fieldwork Phoenix (Scottsdale) Fieldwork Phoenix (South Mountain) Plaza Research Schlesinger Associates</td>
</tr>
<tr>
<td>RHODE ISLAND</td>
<td>Performance Plus (Providence)</td>
</tr>
<tr>
<td>SAN DIEGO</td>
<td>Plaza Research Research Tower Research</td>
</tr>
<tr>
<td>SAN FRANCISCO</td>
<td>Fieldwork San Francisco Focus Pointe Global Greenberg Studios Plaza Research Schlesinger Associates</td>
</tr>
<tr>
<td>SEATTLE</td>
<td>Fieldwork Seattle (Downtown) Fieldwork Seattle (Kirkland) Gilmore Research (Downtown)</td>
</tr>
<tr>
<td>TEXAS</td>
<td>Austin Market Research (Austin) Delve (Dallas) Fieldwork Dallas Focus Pointe Global (Dallas) Murray Hill Center (Dallas) Plaza Research (Dallas)</td>
</tr>
<tr>
<td>VIRGINIA</td>
<td>Alan Newman Research (Richmond)</td>
</tr>
<tr>
<td>WASHINGTON, D.C. (Metro Area)</td>
<td>Metro Research (Alexandria, VA) OMR (Greenbelt, MD) OMR (Washington, DC) Shugoll Research (Bethesda, MD)</td>
</tr>
<tr>
<td>WISCONSIN</td>
<td>Delve (Appleton) JRA (Milwaukee)</td>
</tr>
<tr>
<td>CANADA</td>
<td>Consumer Vision (Toronto) Research House (Toronto)</td>
</tr>
</tbody>
</table>

[www.interactivevideo.com](http://www.interactivevideo.com)
that time of year again — our time to learn, connect and have fun! Whether you have been to Vegas before or not, attending this year’s Conference is not a gamble. We believe the scope of our program is quite impressive:

• There are eight professional development workshop time slots vs. the seven in prior years — with 28 sessions from which to choose.

• Our first-ever Master Class will serve as our Conference Keynote event. Three leading qualitative research consultants — Pat Sabena, Judy Langer and J.R. Harris — will each conduct a live focus group, followed by questions and answers with attendees.

• There is more quality networking time on the schedule — for building and maintaining valuable qualitative research contacts.

In laying out the workshops, our goal was simple: “All attendees should have to struggle a bit to decide which sessions to attend because they all sound so good!” The newly created tracks reflect what we have heard is most important to QRCs, including advanced skills, how-to’s and why it matters (contextual learning). As you look through the following pages, we hope you will be as excited as we are by the diverse, interesting and high-impact sessions!

Jay Zaltzman and Abby Leafe, this year’s Conference Chairs, are also overseeing the rest of our terrific program: a fabulous Roundtables lineup, Healthy Connections for those who want to stretch their bodies in addition to their minds, Dine-Arounds for smaller group dinners (with restaurants to fit within everyone’s budget) and, of course, the Vegas-style party at Lavo Nightclub! Plus, for those of you who are coming early, remember the always-popular Early-Arrivals Dinner.

The top-rated, all-suites luxury Venetian Palazzo® Resort will host our Conference this year. The room rates are great, lower than last year’s!

For more information including registration and a printable Conference schedule, visit QRCA.org/2011. If you have any questions, please feel free to get in touch with any of us.

What happens in Vegas is likely to impact you and your business in a positive way. We look forward to seeing you there October 12–14!
**Technique**
Keeping your moderating skills current and incorporating new approaches into your qualitative practice allow you to be the “go to” researcher for client projects. Enjoy a range of presentations to fit your personal needs, from traditional venues to online methods to ethnography and everything in between.

**Interpretation**
Your analytic and reporting skills say a lot about you and how clients view you. These presentations provide you with options to strengthen your final client deliverables — and leave a lasting impression.

**Catalyst**
These workshops have been selected for their potential to inform you about related-field trends that could impact the work you do in a positive way. Tailored to qualitative researchers and their practices, these presentations are designed to get you thinking about the work you do in a whole new way. Some sessions may be tactical, and others conceptual, but all should get you thinking, “What if…?”

**Business**
These presentations are all about the business side of your practice. Workshops focus on productivity, brand identification and building, and harder-to-serve clients/industries.
WEDNESDAY, OCTOBER 12

Keynote Session
1:15 p.m. – 4:15 p.m.

Master Class Keynote
Panelists: Bob Harris, Judy Langer and Pat Sabena

Surgeons stand in to observe other surgeons. Pilots watch other pilots from the jump seat. Teachers spend months in another teacher’s classroom. Why? To transfer learning and skills in the spirit of best practices. Shouldn’t we, as moderators, do the same?

Don’t miss this special opportunity to learn directly from those who have shaped qualitative research into what it is today! This session was a hit when it was presented at the Philly chapter, and now we are bringing it to the entire membership with a fresh topic and local Nevada consumer respondents.

Bob Harris, Judy Langer and Pat Sabena, with more than 115 years of collective experience, will share how they developed their style and approach to moderating, and then they will show us how they do it by each moderating a live 30-minute mini-group. Join the discussion as we each consider our own unique style and approach and explore opportunities for individual growth as qualitative research consultants.

We will kick off with a panel discussion as Bob, Judy and Pat talk about how they work to clearly understand client needs and objectives, and the impact on designing the discussion guide. Then we will move on to three 30- minute mini-groups conducted by each panelist with moderator debriefs in between. (Each presenter/moderator will prepare a discussion guide based on their interpretation of a research brief created by the Conference leadership team.)

We will conclude with a discussion about what was learned collectively in observing different styles and approaches. We will also take time to share potential individual implications in helping us all better serve our clients.

Roundtable Discussions
4:30 p.m. – 5:30 p.m.

This year, we will have two different types of roundtable discussions:

Classic Roundtables are based on the traditional focus group format. Up to 10 participants can join a table to discuss a topic among colleagues, moderated by a fellow QRCA member. Attendees share experiences, ideas and/or questions about topics of common interest in an informal discussion.

Expert-Led Roundtables are a change of pace from the traditional moderated roundtable discussions. A recognized expert on a topic will present a brief presentation to the audience at the table. (Potential examples include laddering techniques, creative use of video and online research fundamentals.) Members of the group will then ask the expert questions or simply listen and take it all in.

There will be a list of discussion topics to choose from in advance, and the idea is that all QRCs can contribute on their chosen topic(s), given the diversity of our research experiences: whether we are veterans, new practitioners or somewhere in between. Roundtable discussions provide an opportunity to have fun, exchange ideas and forge personal connections with other QRCA members. Many feel the roundtable discussions are a key source of QRCA’s unique, collegial, organizational culture.

Cocktail Party – With The QRCA Band
5:30 p.m. – 7:30 p.m.

Dine-Arounds
7:30 p.m.

Dine-Arounds are the perfect place to relax over a great meal and really get to know fellow QRCs socially, at a slower pace than most Conference activities allow. Sign up at the Conference to join a group of 8 to 12 other QRCs for dinner. Make your selection from the restaurant descriptions posted on the Dine-Arounds board near the Hospitality table.
Stand out from the crowd.

...attending the Burke Institute qualitative seminars means new tools, greater knowledge, more experience and additional credentials.

The Qualitative seminar series includes the following three programs:

**Focus Group Moderator Training**
Learn all the core moderating skills needed to design, execute and deliver qualitative projects by participating in multiple workshops and feedback sessions throughout the course. On the last day of the seminar, you will have the opportunity to lead a live focus group on a topic of your choice, using externally recruited respondents. You will walk away with your own videotaped session and direct feedback from one of our seminar leaders.

**Specialized Moderator Skills for Qualitative Research Applications**
Build, practice and expand your toolkit of specialized techniques from topics such as personification, laddering, repertory grid, mind mapping, card sorts, storytelling and many more. Workshops, focus groups and feedback sessions will be used to support the learning opportunities.

**Next Generation Qualitative Tools: Social Media, Online Communities & Virtual Research Platforms**
Enhance your knowledge by learning how to use social media, online communities and virtual research platforms to support your ongoing qualitative research initiatives. Hands on coverage includes learning how to use and implement next generation tools so you leave with a working knowledge of what may or may not work for your projects.

For more information visit [BurkeInstitute.com](http://BurkeInstitute.com)
THURSDAY, OCTOBER 13

Annual Membership Meeting and Town Hall
9:00 a.m. – 10:15 a.m.

Morning Workshops
10:45 a.m. – 12:15 p.m.

Power Up through Paradox: Polarity Management® as a Tool for Addressing Complexity
Track: Catalyst
Presenter: Liz Monroe-Cook, Ph.D.
Using paradox or reconciling seemingly opposite truths is recognized as essential for addressing complexity. Explaining complexity is a particular benefit of qualitative research. Do we use awareness of paradox, though, as deliberately and consciously as we could?

This session will introduce Polarity Management®, a form of systems thinking that taps the power of paradox. Polarity Management is both a way of thinking and a specific tool for analysis and action planning. Drawing on ancient wisdom about dynamic tensions, it encourages us to understand that complex challenges cannot be addressed by only one answer. To breathe, we inhale and we exhale; we cannot survive if we do just one. Many interdependent factors or polarities appear in the work done by researchers; for example, cognition and emotion, expectation and experience, leading the market and responding to the market.

In this session, you will build awareness of common polarities, distinguish them from problems to solve and learn how to map polarities (identifying positives, negatives, action steps and early warnings) as practical and creative tools for your work. You will be challenged to use a new lens and supplement either-or thinking with both-and thinking, affirming the richness of the work you do.

Target Audience: QRCs seeking new analytic tools for their practice and for successfully interacting in the world in general.

Need a “Magic Wand” for Your Boring and Ugly Reports?
Track: Interpretation
Presenter: Tim Billies
Dread the reporting phase of your projects? Want to stand out from the crowd and deliver memorable, impactful reports to your clients? In this session, you will learn how to “skinny down” the text and augment it with combinations of imagery, video, music and flowing symbolism. Tim will review the Deep D.I.V.E. (Dynamic, Interactive, Versatile and Engaging) reporting approach and show you how these new skills will not only emblazon your research findings, but will also “live on” in the eyes, hearts and minds of your clients and other third-party players.

This session will cover:
• Philosophy and design principles
• Common pitfalls
• Basic creative layouts with high impact
• Extensive before and after how-to’s

Attendees will leave this session ready to embrace reporting with creativity and zest, with the needed tools to take their reports to the next level.

Target Audience: QRCs who create qualitative marketing research reports and presentations, ideally with at least a baseline understanding of PowerPoint.

Building on Spirit: Practical Applications to Establish the Ultimate Connection
Track: Technique
Presenter: Ricardo López
• There are no bad respondents.
• The group you are moderating is always perfect.
• You are responsible for everything that happens in the group.
• You can effectively connect with any participant, regardless of race or ethnicity.
• Welcome to “Building on Spirit”!

You may have seen Ricardo’s presentation on “Moderating with Spirit” at a prior QRCA Conference or chapter meeting. In “Moderating with Spirit” Ricardo explored the intangible qualities that QRCs use to connect with participants, and he outlined a set of principles that are used by the masters in our field. This presentation builds on those principles and teaches various techniques and exercises that are conducive to building a spiritual connection with research participants — a connection that will put you in control of every interview.

The presentation starts with a quick summary of what moderating with spirit is all about. It then goes into a tutorial of basic approaches and techniques that help open the path to this higher level of engagement. It includes basic instructions and many “tested” qualitative research practices on how to eliminate the roadblocks that prevent heightened engagement. It also incorporates interactive demonstrations.
Target Audience: Everyone can benefit from this session, but it would be best if the audience member has attended one of Ricardo’s presentations on “Moderating with Spirit” or has read his VIEWS article in the Winter 2009 issue.

Repositioning Yourself
Track: Business
Presenter: Karen Lynch
New methodologies, increased competitive pressures, changing customer needs… how do you, an independent researcher, maintain the success you have attained and/or make deliberate, strategic moves to be more successful in the qualitative market research field today? Do you find it hard to describe how you stand out in the qualitative research crowd? This workshop will provide the tools to reposition yourself in today’s world and enable you to take the actions needed for success. It will include:
• A brief introduction about personal brands and positioning
• In small breakout groups, a discussion of the state of the qualitative marketplace today — and where you currently fit in it
• Proven “purposeful reflections” and independent brainstorming exercises to help you create your new, improved, solidified image (based on the core benefits you bring to the marketplace)
• An “action framework” for taking that image public and establishing your new positioning
As an attendee, you will leave the session having started the necessary work to determine where you are in your career, where you want to go and how you can get there. Now is the time to focus on yourself and do the work you cannot afford not to do!

Target Audience: Independent qualitative researchers, whether newly out of school, just hanging out a shingle or experienced, but looking to evaluate and promote their point of difference in today’s marketplace.

Lunch — In the Marketplace
12:15 p.m. – 1:30 p.m.

We realize that it’s “location, location, location.”
So which location do you prefer?

A. Our convenient downtown Chicago facility
B. Our original Oak Park facility
C. Our brand new Oak Brook facility
A Day In The Life: My First Year as an MROC Moderator  
Track: Technique  
Presenter: Holly O’Neill

MROCs (Market Research Online Communities) are the hottest growth area in qualitative research! Why? Because marketers desire to go beyond interviewing respondents about their opinions and seek to also build relationships with their customers and prospects.

Don’t be left behind! Join the online revolution where social media meets market research. In this informative and entertaining seminar, you will hear first-hand, from an experienced QRC (turned MROC moderator) how to sell MROCs, how to build them and how to service and analyze them to yield actionable insights for your clients. With this powerful new technology, you will see how to capture rich customer insights organically through social media, as well as more formally via robust online qualitative tools — all inside one custom-research portal!

In this informational presentation, you will:

• Walk away with the introductory knowledge that moderators need to begin offering MROCs.
• Learn practical how-to’s from an MROC moderator, from planning to moderating to reporting.
• Equip yourself with a toolbox full of Do’s & Don’ts for servicing MROCs.

Join in on the community spirit! Increase your market value as a QRC, and add a new income stream, by selling and servicing MROCs!

Target Audience: Experienced QRCs, with online qualitative proficiency, who wish to learn how to apply their skills to the new and exciting methodology of MROCs.

Top of the World

Amp Up Your Practice with Visual Thinking  
Track: Technique  
Presenters: Susannah Childers and Lynette McCormack

Want to better engage your client teams while you are moderating? Come learn how the use of simple visuals can help your clients learn more, connect ideas and have fun in the process!

This session will cover the basics of visual thinking and provide simple graphic-recording skills that you can apply right away with your clients, including:

• Why visuals? What they do and why they work
• Overview of basic visual language
• Drawing practice: basic shapes, using colors and recording practice
• Using graphic templates as “visual thinking” tools
• Plus, tips and resources for bringing visual thinking to your practice

In extended-breakout sessions, you will put to work what you have learned, literally drawing on the walls (paper covered, of course) and seeing the benefits of visual thinking in practice.

As a result of this session, you will learn:

• Why and how visuals help people go beyond top-of-mind responses
• How to use visuals to enhance engagement in a meeting
• How graphics help teams to see new connections and encourage big-picture thinking
• How simple graphic frameworks can support the group’s visual memory, leading to increased alignment and productivity
• How the use of colors can enhance any recording (flip charting, too!)

Target Audience: Qualitative researchers at any level of experience can benefit from this session. It will provide some simple and fun tools for the newest consultants and bring new tricks to the most experienced among us.

Interpreting Ethnography for Actionable Insights
Track: Interpretation
Presenters: Bill Abrams and John Holcombe

Participants will view a video extracted from an ethnography project rich with emotional, cultural and usage issues. Working in small groups and using a proven process, they will collect and interpret the data, and develop insights that unlock opportunities from the material under the guidance of experienced, professional ethnographers. At the close, attendees will share their insights with the others. They will take away “eyes and ears” primed for insight-mining in their next ethnography project. (Attendees will be limited to 40, in order to facilitate the small group nature of the workshop.)

Target Audience: Qualitative researchers who want sharpen their skills in finding ethnographic insights that translate into action.

Afternoon Workshops Continue
3:30 p.m. – 4:30 p.m.

How to Unlock the Treasures, and Avoid the Pitfalls, of Social-Media Listening
Track: Interpretation
Presenter: Amanda Durkee

Are you struggling with how to leverage social media to inform primary research insights? Are you overwhelmed by the myriad of tools offering you solutions, yet requiring too much time or money?

Many of today’s tools have been designed for marketers rather than for researchers. This session will provide you with some real-world examples of how to use social media most effectively to inform and enhance qualitative research studies. It will include:
• Steps for setting up a successful social-media listening campaign
• Issues to avoid to maximize success

Get Ahead in the Cloud: How to Run Your Business Costs Effectively Using Tools and Services Freely Available Online
Track: Business
Presenters: Jennifer Dale

Online tools and services are not just for online businesses! Whether you moderate face-to-face or online, this value-packed session will reveal how QRCs are using the internet right now, at little cost, to work faster and smarter.

Don’t let buzz words like “cloud computing” and SaaS turn you off. Discover from first-hand accounts how to take advantage of web-based

Vegas, Baby!
Track: Catalyst
Presenter: Gene Johnson

While we’re in Vegas, it begs the question: what can we learn from consumer attitudes and behaviors about gambling that apply to real-life decision-making? Gambling terminology infuses our lives and everyday language, and the concept of risking a small stake for the prospect of greater gain is a basic motivator of consumer behavior, whether people wager money in casinos or not.

This presentation will give attendees some historical and social background on the industry that built the city of Las Vegas, dispel common misconceptions and demonstrate how gambling is fundamentally interwoven into the human character. The presentation will further explore how gambling plays a role in human behavior and the everyday decisions and social interactions that are so important to qualitative research.

It will show that gambling predates agriculture and can be found in some form today in virtually every human culture. The presentation will describe how gaming developed in ancient civilizations, flourished through the Middle Ages and was studied by many of the intellectual giants of the Renaissance. Gambling was responsible for the science of statistics, which originated to predict the probability of future gaming outcomes and which remains an essential tool for marketing researchers today.

Target Audience: QRCs who want to know about gambling and risk-taking behaviors in general, how risk-taking relates to product-purchase decisions (especially new or previously untried products) and how the basic human urge to gamble plays a part in current decision-making theories, including behavioral economics.
software that will improve productivity, streamline collaboration and enhance your presentations, while simultaneously decreasing your business expenses.

With so many free applications and solutions available online, how can anyone choose? Snap out of your decision paralysis and get organized, informed and in touch. Learn where to find, and how to use, the best-performing and lowest-cost software for QRCs. Experience true mobility, and add value to your business and your life!

Target Audience: QRCs and small-business owners seeking cost-saving tips and tools for running a business.

Unleashing the Power of Real People
Track: Technique
Presenters: Renee Murphy and Justin Masterson

Qualitative research is powered by the depth, imagination and luminance of real people. Our respondents are the lifeblood of our work. They are the inspiration for, and ultimate judges of, all that we do and all that we help our clients to achieve.

This presentation will share three methods to tap into the power of real people by engaging their imaginations with excitement and tension, which encourages the human propensity for multisensory metaphor that, in turn, unlocks the creative process. Renee and Justin will invite attendees to brainstorm new ways to unleash this creative potential in real people and improve their insights tenfold.

Specific method case studies to highlight valuing respondents in research include:
• Auction — utilizing game principles to engage respondents in an arena that they understand
• Holistic Initiative Design/Co-Creation — utilizing pictures and images to give respondents a voice beyond the verbal
• Tension & Resolution — getting into awkward, objective-related situations with respondents and resolving the tension

Target Audience: All QRCs involved in medical or pharma research, as well as those who want to move into this arena.

Afternoon Workshops Continue
4:45 p.m. – 5:45 p.m.

Every Time I Think Have the Answers, Someone Changes the Questions: QR in the Rapidly Changing World of U.S. Healthcare
Track: Business
Presenter: Maria Shepherd

Hospitals, MDs and medical-company clients are reeling from the changes that are occurring in healthcare! Ask an MD about current issues, and you may lose control of the focus group — these changes impact our medical and pharma clients and respondents emotionally, professionally and financially. You will not have to probe far to get them talking about an alphabet soup of ACOs, EMRs and their impact on U.S. healthcare.

This session is a review of current and future changes to help you stay on top of the conversation (and also to learn how healthcare reform can affect you). Further, it will discuss how to turn findings into actionable marketing tactics, thereby increasing your value to your clients. Three case studies will be presented and will cover:
• Integrating new topics in medical QR, like the “R” word (reimbursement)
• How the development of accountable-care organizations will impact MD perceptions and use of medical devices and pharmaceutical products
• How new applications in healthcare IT (HIT) are changing the landscape of how medical respondents operate and the products our medical and pharma clients provide to them

Stay relevant! Learn about the future of our medical and pharma clients and how these changes will affect QR in healthcare.

Target Audience: All QRCs involved in medical or pharma research, as well as those who want to move into this arena.

Qualitative Research on a Quantitative Scale: Are We Ready?
Track: Technique
Presenter: Sean Conry

The untold story about modernizing qualitative research is not about how you can “listen” to social media, run an online focus group, hold SMS conversations or let users post to bulletin boards from their smartphone. Those techniques are powerful, but we also need to think one step further and be inspired by the characteristics of social media that have attracted more than 600 million participants.

Attendees will be challenged to think about how to design research and engage with respondents
in ways that engender trust, increasing the likelihood of sharing more insightful information. You will also explore new ways of looking at ethnography: diaries through a mobile digital research approach that blurs the boundary between qual and quant for better client outcomes. Sean will share thoughts about re-inventing your approach to employ “recall-busting research” and will illustrate some ways to notice emerging themes from visual data collected in real time from respondents. Finally, the session will showcase how mobile qual can create additional opportunities with clients who rely on quant, and consider how these techniques fit into mixed-method research.

Target Audience: Anyone interested in learning about how to use mobile digital research to take a “less traditional” approach.

**Supercharging Qualitative Insights into Marketing Messages**

*Track: Interpretation*

*Presenter: Connie Chesner*

Let’s face it — you are already skilled at designing and conducting research. After all, it is your area of expertise. But how skilled are you at transforming those insights into clear action options for your clients, options that get used and referenced long after you have left the room? You know what you heard, but what does it mean to your client, and how can you communicate implications in a way the client can run with?

Attendees will leave this session with a practical set of tools and techniques that align the analytic process with their client’s need for strategic, business-focused insights. These tools provide resources that allow planning, application and development of insights. Analysis developed through this approach can then be translated into reporting that gets noticed, appreciated and used within the client organization.

**Target Audience:** Researchers looking to enhance their analysis skills with additional tools and techniques as they approach new projects with business-focused clients.


*Track: Technique*

*Presenters: Laurie Tema-Lyn*

A good QRCA consultant often needs to be light on the feet, able to jump into a qualitative group or client team session with a quick exercise or two to bring new connections and ideas to the table. This lively, interactive workshop will demonstrate just how to do that. Participants will feel informed, encouraged and refreshed, and they will learn new techniques that they can add to their moderator’s/facilitator’s toolbox.

**Target Audience:** Skilled QRCA consultants who would like to boost their skills or confidence in using creative techniques, as well as newcomers who would like to learn them to enhance their business practices.

**Vegas-Style Party at Lavo Nightclub**

*7:00 p.m. – 11 p.m.*
FRIDAY, OCTOBER 14

Morning Workshops
9:00 a.m. – 10:30 a.m.

The Marketing of Research: Engaging Key Stakeholders through Research and Reporting
Track: Interpretation
Presenter: Robert Miner
Marketing research too often falls short at “marketing” research. What researchers find engaging (the manner in which research is conducted and the way findings are presented) too often falls short in engaging the key decision-makers they are trying to influence.

In this session, you will learn how to structure your study designs and findings to be seamlessly integrated into the key marketing decision-making process, making you a more critical part of the client’s support team. You will also hear examples of ways to create deliverables that “market” your insights long after the project is completed. Specifically, the session will provide insights into methods to engage stakeholders, from study design through reporting, and it will offer guidelines for assessing success. Numerous case studies will be showcased.

You will leave the session knowing more about ways that immersive methodologies and video can be employed, either on a small scale (in more traditional reports) or as a larger-scale research event.

Target Audience: QRCs who want to increase the visibility, usefulness and impact of their research reporting.

Going for a BIG Insight?
Understanding the Stages of Creativity
Track: Catalyst
Presenter: Joanne Brunn, Ph.D.
Why is it so hard to get to that “aha” moment? Creativity is often misunderstood and may seem overwhelming to put into practical use. However, we all naturally follow the creative stages of preparation, incubation, illumination and verification.

Through understanding these research-based stages of creativity, you will learn how to identify and manage the stages to encourage creativity. The stage that often gets neglected or outright prohibited is incubation; yet, that is the major factor in getting to that “aha” moment of illumination. Come and learn practical and fun ways to best take advantage of everyone’s natural creative flow.

You will walk away from this session with:
• The ability to identify which stage of the creative process your project, client or workshop participants are in, as well as how to incorporate that knowledge into your work
• Practical tools for integrating incubation into your own focus groups, interviews and client workshops
• An understanding of what happens to your brain during insight and how to set the stage for this to easily occur

Target Audience: QRCs at every level of experience who are interested in understanding more about creativity for themselves, their clients and the participants in their workshops.

Hate Selling?
Build Your Profile Instead
Track: Business
Presenter: Susan Abbott
Many of us hate cold calls — we hate getting them, and we do not like making them either. Like many successful independent consultants, Susan has used profile-building strategies to build her professional brand, and so can you.

As always, it is about the brand — your brand and your unique value proposition. You know what you stand for, why clients hire you and what sets you apart. But how do you get that brand out in the world in a bigger way and, more importantly, in a way that attracts the attention of potential clients? Today’s tech-based tools make this easier than before, but only if you use them well.

What you need is your own practical strategy, combining online and offline methods, customized to your personal strengths. Profile-building takes time, but there is an added bonus: becoming a better researcher, writer and presenter while you are at it.

This highly interactive workshop will review the broad brand-building territory — from newsletters to e-books, blogs and public speaking — focusing on some of the pros and cons of each approach. You will leave the session with a better sense of you, where your brand can shine and a practical plan that you can start implementing immediately.

Target Audience: Individuals who have all the basics in place and want to grow their business by building a high-profile personal brand.

Morning Workshops Continue
11:00 a.m. – 12:00 p.m.
Psssst!
Have you heard why it’s great to be a QRCA member?

In-training now? 
Candidate Membership is for you!

Candidate Membership is for those undertaking training to be a qualitative researcher, and it provides access to the knowledge, courses and experience of QRCA. It offers many of the great QRCA benefits.

To become a Candidate Member requires:

- Endorsement by a QRCA member;
- A short essay on the candidate’s interest in joining QRCA;
- A professional resume (with in-training activities);
- Meeting the standard QRCA qualifications.

If you are in-training to become a qualitative researcher or know someone who is, make sure you check out this program.

With the educational training discounts now offered to all members, QRCA Candidate members could save enough to pay for their membership dues!

Visit the QRCA website www.qrca.org and go to “Join QRCA” to gain more insight into the Candidate Member category, and to www.qrca.org/discounts to learn more about these exclusive educational discounts.

Exclusive member discounts available at leading qualitative research training organizations!

Professional development is a key reason for joining QRCA. Members now have access to six leading, world-class qualitative research training organizations at special discounts. Many are led by QRCA members themselves.

QRCA selected these training organizations to ensure diversity and choice. So whether you are an experienced qualitative researcher looking to sharpen your skills or just starting your career, you’ll benefit from these training opportunities.
The Six Drivers of Trust: Building Trust in Your Market Research and Brand
Track: Catalyst
Presenter: Nick Black
When you are in the business of market research, commanding trust is the key to success. In fact, it is a primary driver of client relationships and loyalty. When clients trust you, 83% will recommend you to other people, 82% will use your products and services frequently, and 50% will pay more for the services you provide.

So, how can you build trust with existing and potential clients? That is the topic of this presentation and the focus of studies conducted by Concerto Marketing Group and Research Now. Using morphological psychology, and real-life examples from Europe, Australia and North America, this presentation will explain:
• Why trust is the key to building your business
• What the six psychological drivers of trust are
• How you can build trust with existing and potential clients

By the end of this session, you will understand what the six psychological drivers of trust are, as well as how you can use these drivers to improve your client relationships.

Target Audience: Executives, owners and managers of market research businesses, specifically those involved in selling research projects and delivering research results to clients.

Moving Traditional Projectives Online
Track: Technique
Presenter: Monica Zinchiak
This presentation will give you the knowledge and confidence to adapt face-to-face projective techniques to your online research studies, be it bulletin boards, insight communities, immersion studies or anything in between! Case studies and examples will illustrate a number of projective techniques that Monica has used in the past with great success, in addition to informing you of what has not worked so well. Attendees will learn:
• Which techniques best translate to the online environment
• Three key components that will make any online projective successful
• The how-to’s of creating and implementing your own original online projectives

• Resources for ready-to-use exercises and online qual resources

You will walk away with inspiration and new tools to include in your online qualitative toolbox that are sure to better engage your respondents and produce richer insights for your clients.

Target Audience: Researchers who have a solid understanding of online qualitative research and are hoping to “up their game,” and for those struggling with how to get more from their online respondents.

Tech Tools & Jargon for Success in Business
Track: Business
Presenters: Patrice Wooldridge and Patrick Wooldridge
Join us for a simple, entertaining and engaging session on the latest hardware, software and tech jargon that can allow you to express your creativity and better relate to younger consumers and clients. Gain uncomplicated understanding of netbooks vs. notebooks vs. tablets, Twitter vs. Tumblr, cloud computing, etc. Learn tips for employing these new terms and technologies in our profession and for choosing just the right solution for your needs. Technology can help us to manage our business more efficiently — plus we can entertain ourselves and our clients while doing good work!

All attendees interested in getting and staying current with new trends and terms and effectively using technology will likely pick up at least a few new ideas. Those with less experience will gain a clear and understandable overview and exposure to the field, while the more experienced are invited to share their experience and insights. This session will be particularly tailored for those who work on their own, or with just one or two others, and do not have an IT department to rely on. Technophobes are particularly encouraged to attend. Patrice and Patrick will speak plain English.

Target Audience: For technophobes and technophiles alike who want to understand and explore new terms and gadgets that can be useful in qualitative research.

Awards Luncheon
12:00 p.m. – 1:45 p.m.
Make us your FIRST CHOICE, First Choice Facilities

FIRST CHOICE FACILITIES

Owner managed for quality

If you want first-rate recruiting and first-class facilities nationwide, First Choice Facilities should be your first choice.

► First in precision recruiting — on-site and online
► First in client service — cutting-edge technology and support
► First in top-rated facilities — comfort and amenities

Think of us FIRST!
888.323.2437
(888.FCF.BIDS)
www.firstchoicefacilities.com

Ask about our multi-city discount program:

Atlanta, GA
Superior Research, Inc.

Boston, MA
Copley Focus Centers

Chicago, IL
Focuscope, Inc.

Dallas, TX
Dallas by Definition

Framingham, MA
National Field & Focus

Los Angeles, CA
Trotta Associates

Miami, FL
Ask Miami

Milwaukee, WI
J. Reckner Associates, Inc.

Minneapolis, MN
Focus Market Research

New York, NY
Focus Plus, Inc.

Oakbrook Terrace, IL
Focuscope, Inc.

Oak Park, IL
Focuscope, Inc.

Orange County, CA
Trotta Associates

Philadelphia, PA
J. Reckner Associates, Inc.

Phoenix, AZ
Focus Market Research

Portland, OR
The Gilmore Research Group

San Francisco, CA
Fleischman Field Research

Seattle, WA
The Gilmore Research Group

St. Louis, MO
Hatch Research

White Plains, NY
Reckner Associates, Inc.
FRIDAY, OCTOBER 14

Afternoon Workshops
2:00 p.m. – 1:45 p.m.

Increasing the Effectiveness of Ethnography in Shopper-Insights Research: Or Understanding the Shopping Primate
Track: Technique
Presenter: Gavin Johnston

The retail landscape is changing radically: 70% of purchase decisions happen in-store, 68% of in-store purchases are impulse buys, and 59% of purchases are unplanned. It is no longer sufficient to think about shoppers as people simply looking for goods — they are looking for experiences and using shopping to facilitate cultural and social needs.

After touching briefly on the differences between formal applied anthropology and basic shopper-insights marketing research, this presentation will help take the qualitative practitioner to the next level of field-based research by:

- Sharing more-advanced techniques and how-to’s for correlating cultural cues, language and nonverbal communication, along with a systems-based approach to shopper insights
- Identifying best practices, outcomes and expectations for integrating an ethnographic market research project with designers and marketers, based on extensive case histories

Attendees will come away from the session with a series of new techniques for gathering insights, an understanding of how to incorporate them into their existing research methods and techniques for including insights into the design and innovation process.

Target Audience: Individuals who want to take their ethnographic skill set to the next level and learn new ways of applying insights to shopper marketing.

The Dating Game: Attraction to Long-Term Client Relationships
Track: Business
Presenter: Kathy Jacobs-Houk

What are the keys to attracting and maintaining client relationships? Learn what qualitative research buyers at major CPGs, financial, pharma and full-service companies said they find alluring about QRCs during the initial encounter, as well as how to get the first date, flame the infatuation and land the proposal that leads to a lasting relationship.

Join contestants (our own well-established QRCs) in this rendition of the popular television show, “The Dating Game,” as they answer the burning question of how to get and keep clients. Contestants will be asked the same questions posed to qualitative research buyers during IDIs conducted prior to the session. A grand prize will be awarded to the QRC contestant with the highest score!

Corporate qualitative research buyers and full-service firms revealed:

- Where are the “target-rich environments” to meet them?
- Who initially engages their attention?
- Why do they ask you out on the first date?
- What catches their eye during the date?
- Who should call (follow up) first?
- How do you get asked out again?
- When can you take it to the next level?
- What builds a healthy, long-term relationship?
- How do you keep the spark alive?

Target Audience: Whether you are a new QRC or have been around the block, you will hear from client interviews — and directly from peers — what works when courting and engaging those desired clients.

Art as Qualitative Research: Considering the Possibilities
Track: Catalyst
Presenter: Deborah Potts, Ph.D.

Collage, storytelling, photo journals — such techniques have become mainstream in qualitative research. These forms of artistic expression have given us new modes of inquiry, beyond straight Q&A. They allow us and our clients deeper understanding of the human experience, tapping emotion and displaying context.

Is this all there is, though? How can we push the boundaries of the tools we have, and how might we use art to develop new ones? What other artistic modalities might we use, and to what end?

This presentation explores the theory and practice of art in qualitative research. It borrows heavily from the recent Sage publication Handbook of the Arts in Qualitative Research and includes presentation, hands-on practicum and even some brainstorming as attendees explore together the interface of art and qualitative research.

Target Audience: Moderators who have some experience using creative tools in their research projects.
**Afternoon Workshops Continue**

3:45 p.m. – 5:15 p.m.

**“In the Moment” with Mobile**

*Track: Technique 📞*

*Presenters: Dana Slaughter and Kristin Schwitzer*

In the past 12 months, all major online qualitative providers have launched new mobile platforms, making it easier than ever to gain insights “in the moment.” So, how might you leverage these capabilities, and what are the benefits of using mobile qualitative?

You will hear from two QRCs who have used mobile qual in several applications with their clients and have experience across multiple mobile platforms. Dana and Kristin will present three to four case studies: watching the Super Bowl, getting in the game with U.S. Lacrosse, studying spending with teens and more! Further, they will demonstrate the opportunities, advantages and guardrails for using mobile effectively. Toward the end of the session, attendees will work in small groups to “design your own” mobile qual study. The session will wrap up with time dedicated for Q&A.

The session’s benefits for attendees:
- Gain perspective on the mobile qual industry.
- Understand when (and when not) to use mobile qual, including how to pick which type of mobile is best for your needs.
- See examples of how other researchers have used mobile.
- Learn tips on what to do/not to do when working with mobile qual.
- Co-design a mobile qual study with your peers in a safe environment.
- Get the chance to ask questions of QRCs who are experienced with using mobile.

**Target Audience:** Experienced QRCs who are looking to leverage mobile in their studies and learn new approaches. Prior experience with online QR is not required.

**Concept Crisis 101: How to Fix, Cobble and Mend “Broken” Concepts for Actionable Client Learning**

*Track: Technique 📞*

*Presenter: Martha Guidry*

Each QRC desires to truly partner with clients to give them the best-quality output for their research dollar. Unfortunately, sometimes you get stuck with some horrible stimuli. This situation can be particularly problematic when it comes to writing and evaluating marketing concepts.

In this session, you can brush up on your concept-writing skills and/or learn how to better evaluate a concept. Learn about the basic structure of a winning concept, the typical pitfalls in clients’ concepts and ways you can address these problems. You will leave with enhanced concept knowledge and helpful strategies to help “manage” your clients’ concepts to a better place before the research occurs. Save your client time and money, while making yourself invaluable to their concept-refinement process.

**Target Audience:** Any QRC who wants to be more effective doing “marketing concept” work.

**Everything Old Is New Again: How to Refresh Focus Groups and Save Your Business**

*Track: Business 📞*

*Presenter: Frankie Johnson*

Once seen as the edgy and creative side of market research, traditional focus groups are now often derided as out of date and unnecessary, given the explosion of online alternatives. This presentation argues that while focus groups should be the bedrock of any successful QRC’s business, in order to be relevant, a qualitative research firm must also provide access to other newer methodologies. The trick lies in seamlessly blending the old with the new.

You will be given examples of how to add value to focus groups by layering on the new tools of online and mobile research, as well as ways to leverage social media. You will come away with renewed enthusiasm about traditional methods, as well as with practical tips to reinvigorate your business.

This session will not be a top-down tutorial. Rather, there will be ample time allowed for audience participation and the sharing of ideas on how to thrive in this brave new world of qualitative research. Be prepared to contribute as well as learn from the others who attend.

**Target Audience:** Seasoned QRCs who are looking for new ways to expand, or simply maintain, their business.

**Farewell Cocktails**

5:15 p.m. – 6:45 p.m.

**Dine-Arounds**

7 p.m. 🍽️
The Artists Among Us

BY KAREN LYNCH
Karen Lynch & Associates  ■  Fairfield, CT  ■  karen@karenlynch.com

“The purpose of art is washing the dust of daily life off our souls.” — Pablo Picasso

We spend so much time at airports, don’t we? Delayed flights. Layovers. Earlier arrivals, thanks to stepped-up security. Sure, Brookstones, Starbucks and XpresSpa locations make our lag time more enjoyable. But if we purposefully tune in to each airport’s art exhibits — the latest trend that is sweeping the terminals — we will be opening the gate to a cultural enrichment renaissance.

“Art and exhibitions are a way for an airport to not only reflect local culture and heritage, but to also connect with travelers who pass through,” says Angela Gittens, director general of the Airports Council International (ACI). “The selected art and exhibitions differentiate airports and add texture to the traveler’s experience.”

Beyond providing an aesthetic value, the ACI has discovered that the presence of art enhances the business traveler’s overall perception of an airport. “Airport art gives business travelers in particular a sense of place and time, which is needed because of the often frenetic pace they keep,” says Gittens.

“For me, the amazingly fun element of artwork in an airport environment is when people are unaware they’re even interacting with art,” said Angie Tabor, manager of communications for Port Columbus International Airport.

With all the benefits to housing art in such a well-trafficked public place, it is no wonder (but perhaps a bit surprising) that in the U.S., local governments are facilitating the growing art programs...
at our airports. Many airport-art programs benefit from “percent for art” ordinances that require developers to fund public art where private or specialized funding of public art is unavailable, usually .5% to 2% of construction costs.

“Airport art makes those long, moving sidewalks more interesting,” says QRCA member Siri Lynn of Idea Exchange. “It makes me feel human to take a moment and appreciate a display of some sort, whether it is the moving neon lights at O’Hare or the origami birds and glass blocks at Denver International that I glimpsed just recently.”

Let’s not overlook performance art; it too has a place on the airport scene. Musicians and theatrical performers of all kinds are starting to become fixtures in some airports. “The band outside customs at Grand Cayman Island airport — now that is a way to welcome strangers to your home,” says Lynn. “That is what airport art does for me: it makes me feel welcomed, like the local community wants me to get a glimpse of what they are really like in that little slice of the world.”

While it is not necessary for you to stop, examine, critique and/or formally appreciate the art you happen upon — its presence alone will allow you to reap benefits — you might want to leave happenstance to other circumstances and seek out the work at the following international airports.

**Amsterdam**

How cool is it that the Dutch national museum, the Rijksmuseum, has an actual annex built within the Schiphol Amsterdam international airport? This museum opened in 2002 and was the first of this kind, setting the stage for other national institutions to follow its example. Imagine, an annex to the Smithsonian at Dulles! Awesome.

The Rijksmuseum Schiphol permanently showcases a collection of Dutch masters from the Golden Age. In addition, the annex hosts temporary exhibitions. Dutch Flowers, still-life depictions of garden bouquets that only the most affluent could afford in the 17th century Holland, is on display through September 2011. The exhibit is called “Washington: More Than Monuments” and features photos of the National Mall, fireworks above the Capital dome and the famed cherry blossoms.

**Athletic Endeavors**

Just do it! Visit London Heathrow, that is. As the officially designated airport of the 2012 Olympics, they will feature their High Performance Art Exhibition with sport and Olympic-themed art by leading and emerging British artists (based in Terminal 5 until the end of January next year).

**Scavenger Hunts**

It is like “Where’s Waldo?” Visit the Denver International Airport website (flydenver.com), and find a scavenger hunt for each of four airport locations. Then, scout out answers to such questions as: Find the musician on the floor at the east end of A Gates. What instrument is he playing? What astronaut has a statue on B Gates?

**Patriotic Pictures**

Oh, say can you see? More than 40 photos from members of the Professional Photographers Society of Greater Washington are on display in The Gateway Gallery at Dulles through October 2011. The exhibit is called “Washington: More Than Monuments” and features photos of the National Mall, fireworks above the Capital dome and the famed cherry blossoms.

**Eelke J. Eelkema, Still Life with Flowers and Fruit, c. 1815-30, at the Rijksmuseum annex at Amsterdam Airport Schiphol**

**Brushstrokes in Flight, a 26-foot tall sculpture by the late Roy Lichtenstein at the Port Columbus International Airport.**

“For me the amazingly fun element of artwork in an airport environment is when people are unaware they’re even interacting with art, such as when travelers are seated around Brushstrokes in Flight created by internationally-acclaimed artist Roy Lichtenstein,” said Angie Tabor, Manager of Communications for Port Columbus International Airport.
San Francisco
What started as an initiative to humanize the airport environment has become a place for San Francisco to make a first impression to the world as a significant international gateway to the United States. While not a national museum per se, the San Francisco International Airport (SFO) Museum became the first and only museum located at an American airport to receive accreditation from the American Association of Museums.

Today, the SFO Museum features more than twenty galleries. Art, history, science and cultural exhibitions are always on rotation. SFO also hosts the San Francisco Airport Commission Aviation Library and Louis A. Turpen Aviation Museum, housing a permanent collection dedicated to preserving the history of commercial aviation.

Coinciding with the airport’s round-the-clock hours of operation, museum exhibitions are on view 24 hours a day. The San Francisco Airport Commission Aviation Library and Louis A. Turpen Aviation Museum is open Sunday through Friday from 10:00 a.m. to 4:30 p.m.

CREATIVE EXCURSIONS

• Force a connection between your current research project and the exhibit in front of you. In what way is one painting (or sculpture or photograph) similar to your client’s brand, concept or package design?
• Develop a new technique based on what you see. How can you utilize that medium (oils, clay, pastels, colored pencils, photography, etc.) in your next project, literally or figuratively?
• Purchase a card deck (or something else) from the gift shop to use for future projective exercises.
• Reflect on your career. Which artist best personifies yourself as a researcher? In what way are you most like Escher, Dalí, Van Gogh, Monet, Matisse, Pollock, Warhol… or someone else?

Our Focus...
• Meticulous Recruiting
• Personal Client Service
• Experienced Management

Suzanne S. Cattell, Owner
407.671.3344
info@AboutOrlandoResearch.com
www.AboutOrlandoResearch.com

Celebrating “Top Rated” in Impulse Survey for 12 Years!

Focus Groups • Rentals • Taste Tests • IDIs • Mock Trials • Ethnos

ABOUT ORLANDO MARKET RESEARCH
How cool is it that the Dutch national museum, the Rijksmuseum, has an actual annex built within the Schiphol Amsterdam international airport?

**Phoenix**

According to its website, the Phoenix Airport Museum also has a mission—“to enhance the public’s experience by creating memorable environments in the airport system that promote Arizona’s unique artistic and cultural heritage.” That’s why a collection of almost 600 works of art is on display at the Sky Harbor, Deer Valley and Goodyear airports. The organization has been collecting art since the early 1960s. A government ordinance even states that up to 1% of capital improvement projects should be spent on art commissions and purchases.

At Sky Harbor, in each terminal (and in the rental-car center) you will find ceramic tile and mixed-media murals, metal and ceramic sculptures, photographic and digital prints, acrylic and oil paintings, and fine-art prints using various techniques. All Sky Harbor exhibitions are free and viewable 24 hours daily. Most are pre-security. Deer Valley and Goodyear Airports are viewable between 6 a.m. to 9 p.m. daily.

**Atlanta**

Atlanta... huge airport, right? Approximately 250,000 travelers pass through the six concourses at the Hartsfield-Jackson International Airport each day, concourses that showcase close to 250 works of art! There are both permanent and rotating exhibits, with pieces ranging from smaller framed works to monumentally scaled art integrated into the architecture. The airport even has three youth galleries in the airport, with artwork provided from school children through the Georgia Arts Educators’ Association. I am totally seeking these out the next time I pass through with my children!

Managers of the Department of Aviation’s Art Program boast of their eclectic, internationally and locally focused art collection. Throughout the airport, you will find three large floor
Today, the San Francisco International Airport Museum features more than twenty galleries. Art, history, science and cultural exhibitions are on always on rotation.
becoming the world’s best airport by exceeding customer expectations.”

Denver
Denver International Airport is home to a world-renowned collection of public art, funded by the City and County of Denver’s “one percent for art” requirement for public facilities. The airport’s Public Art Program features 27 site-specific works and includes sculptures, murals and other installations. The pieces are displayed in outdoor landscapes, inside Jeppesen Terminal and on airport concourses, as well as in the train tunnels and on the train itself. In addition to the permanent art collection, DIA curates temporary exhibitions, collaborating with museums, cultural institutions and arts organizations to present the highest-quality two- and three-dimensional work.

“Dual Meridian” by David Griggs
Location: A Gates, Center Atrium at Denver International Airport
Check Out Our Newest Podcast with Dorie Clark

Over the past two years, QRCA has brought you two dozen podcasts of interviews conducted by QRCA members with influential leaders from qualitative research, strategic consulting, academia and other relevant fields. You can listen to these interviews right on the QRCA website as streaming audio, or you can download the mp3 file to your laptop or portable player for listening on the go. You will find the podcasts under the Publications link at www.qrca.org.

Be sure to check out our latest podcast to hear Business Matters Feature Editor, Kay Corry Aubrey, interview Dorie Clark, who is CEO of Clark Strategic Communications. In the interview, you will hear Dorie’s advice for how to become a referral magnet. She definitely knows what she is talking about, given her years of experience as a strategy consultant who has worked with such clients as the National Park Service, the Ford Foundation, Yale University and Google. She served as the New Hampshire communications director for Howard Dean’s presidential campaign and the press secretary for former U.S. Labor Secretary Robert Reich’s race for Massachusetts governor. She has been published in the *Harvard Business Review* and is a regular contributor to the *Huffington Post* and BNET, the business division of CBS Interactive. Prior to her work as a communications specialist, Clark was a staff writer for the *Boston Phoenix*, covering local politics and policy and winning two New England Press Association awards. She was also a regular contributor to the *Boston Globe*, *Boston* magazine and *CommonWealth* magazine.

Find this informative new podcast — as well as interviews with Andrew Ballenthin, Mary Ellen Bates, Scott Berkun, Ilse Bunan, Bill Buxton, Sean Campbell and Scott Swigart, Stephen Covey, Paul Gillin, Judith Glaser, Kenneth Gronbach, J. Robert Harris, Bill Hartman, Jackie Huba and Ben McConnell, Andrew Kent, Jim Loretta, Dr. G. Clotaire Rapaille, Dave Siegel, Jean D. Sifleet, Susan Spiegel Solovay and Barbara Newman, Linda Kaplan Thaler and Robin Koval, Liz Van Patten, and David Vinjamuri — all at www.qrca.org.
Are You Getting *Fresh* Recruits?

Get *more* from your recruiting partner

With proprietary custom software and consistent investment in our databases,

*L&E Research offers you:*

- Efficient accurate recruiting
- 94% show rates
- Articulate engaged recruits

Why settle for yesterday’s databases, professional recruits, or over researched respondents?
Let L&E deliver you the fresh qualified recruits YOU want!

*L&E Research*
Since 1984 • Raleigh • Tampa

Impulse Survey Top Rated
Raleigh, NC • Tampa, FL

www.leresearch.com  877-344-1574  bidrequest@leresearch.com
From time to time, every moderator, meeting facilitator or ideator needs some fresh and tasty ideas to flavor up their groups. Laurie Tema-Lyn offers more than 50 of those fresh ideas in her book, *Stir It Up! Recipes for Robust Insights & Red Hot Ideas*.

This book, small but filling, is a collection of creative ideas and projective exercises cleverly organized into five sections that make it very easy to find and learn what you need. Like a true master chef, Laurie gives us a bounty of recipes for discovering insights, presented with easy-to-follow instructions. The sections of the book are organized—and even the page layouts read—like a classic cookbook. Simply brilliant! Laurie tells you the ingredients you will need for each exercise (materials and prep work), the time frame for conducting the exercise and the “how-to” instructions for employing each exercise successfully. Presented in this way, the exercises will make perfect sense to you.

This theme is carried through the entire book...

Beginning with the appetizers, titled “Ice Breakers,” the warm-up exercises are designed to come at the beginning of your session or meeting. Some of these exercises are more involved than I personally have the taste for, but I could clearly see how they would fulfill their intention. All whetted my appetite, and I will try some in the near future.

Next, Laurie offers a generous main course in the “Truthsayers” section, which gives you the hearty exercises you will need to dive into the motivations and behaviors of your participants. Here, you will find new spins on some old recipes and many new dishes to add to your “toolbox.” This is a key section for qualitative researchers.

“Energy Chargers” could be described as the intermezzo. These exercises are designed to refocus, realign and recharge your group. This is a lighter section of the book, but not one to be underestimated in terms of value. Laurie, being an accomplished facilitator, is spot-on with the reasons why you need this type of exercise in your repertoire to manage the flow of the group or interview. This is extremely valuable and satisfying guidance.

On to my favorite part of the book—dessert! In the “Connection-Makers” section, Laurie plates up a variety of new and classic projective techniques. Some of these recipes take a little more preparation than others, but they are still quite simple to execute. This will be the sweet section of the book I will return to repeatedly because I typically use projectives in every study I conduct. I could see how easily I can work most of these into my own particular style.

The last section, “Idea Developers,” mostly covers different concept-testing exercises and is quite brief. I would have enjoyed reading and learning more in this area, but I was full from all the other courses (sections of the book).

Laurie is an accomplished qualitative researcher with 20 years’ experience, and her style and flavor come through in this book. Her creativity and love of cooking helped guide the writing in a way that is inventive and fresh. From a qualitative researcher’s viewpoint, I found the book quite inspirational and extremely useful, and I cannot wait to stir things up myself.

Need a reference volume to turn to when you want some creative ideas for exercises to use in your groups to recharge them, go deeper with them or just make sure they get off on the right foot? This book will be a useful addition to your library.

This book, small but filling, is a collection of creative ideas and projective exercises cleverly organized into five sections that make it very easy to find and learn what you need.
On the surface, the aim of Media and Communication Research Methods appears to be an academic introduction to media and communication research. You could easily imagine university students squirreling away hours, studiously trying to memorize key sections of the text. The author, Arthur Asa Berger, makes this aspect of the book easy, with his copious summary lists and a form of devil’s advocate that he calls “Grand Inquisitor,” which helps the reader challenge the reasoning behind many of his suppositions.

The book is, however, so much more than this. It is a testament to Berger’s expansive experience, and it is a landmark text that brings new thinking to the art of research. In fact, I did not realize, when I purchased this book, that it is intended for the student; Amazon gives no indication of this, and there is no implication of this in the title.

Berger is quite a character and has a mean sense of humor, making some of the longer paragraphs digestible. Several hand-drawn cartoons reflect his quirky character and intuitive nature. For a qualitative researcher, these would have been really insightful, had it not been for the poor-quality reproducitive printing. I suspect he might have drawn these cartoons himself. I think the best description of Berger is a “closet qualitative researcher,” who has been sadly lost to the world of academia.

I was attracted to the book since the title states “research methods,” as this is my passion. As far as the subtitle, “An Introduction to Qualitative and Quantitative Approaches,” I felt I could either endure the pain of the quantitative section or bypass it completely. There is a section on “Content Analysis,” which I mistakenly thought referred to typical qualitative content analysis. This section was quite interesting, however, and sparked a few ideas of how I might tackle textual content in the future.

Other than the obligatory “definition of research” section, the book is a good read for any researcher who hopes to discover new approaches and methods of research. It will challenge your thinking, as well as spark ideas and approaches, especially in textual analysis. The book discusses textual-analysis techniques, including rhetorical analysis and using ideological and psychoanalytic criticism. I interpreted these sections as using theological perspectives to analyze and challenge the content of any study, although I did think using “Marxist criticism” to be somewhat stretching it a bit too far.

The highlight for me was the explanation of semiotics. This was by far the best I have ever read, and it even gets close to figuring out research techniques that might work in this field.

The grand finale for me was the section on report writing. In this, Berger shares his personal method of journaling. Because of his ordered, creative way of journaling, I have started to use his methods on a daily basis, and I have found that journaling is both inspiring and life changing.

My only misgiving for the book was a desire to hear more from Berger on semiotics and qualitative research methods.
I was given *The Millionaire Messenger* by a colleague who thought I would enjoy reading it, and I have to admit, I was concerned for the first few chapters. In the first three chapters, the author, Brendon Burchard, tells the story of a life-changing car accident when he was a depressed young man, lays out his views on “information gurus” and explains how he got to where he is in his career as an authority on being an “expert.”

I learned from these early chapters that Burchard has built a business called the Experts Academy, where he teaches his students to become “experts” in their area of expertise, to build a business of their own helping others and to share that knowledge with those who want to learn about that expertise. I was concerned this might be some self-help book that is full of hyperbole, with little substance. Burchard finishes these first few chapters with an interesting comment: “If people spent as much time worrying about how to make a difference as they do about how they could make money, then they would soon find themselves rich beyond belief.”

When I realized that many of QRCA’s own members have become experts in their field and have written books about their area of interest, I thought that this book might be worth reviewing and sharing with the membership. All of us who have considered writing a book or public speaking, to expand our business or to market it to a wider audience, should find guidance in *The Millionaire Messenger* about moving forward with the next steps to this end.

Burchard discusses three pillars of expertise, and he says we should build on them consciously, strategically and actively for the rest of our lives. You are either:

- A results expert, someone who can share from your own experiences
- A research expert, someone who has the ability to research a subject in depth and share it with others (remembering that we all began as students before becoming practitioners, then experts in our area of expertise)
- A role-model expert, someone who is seen as a role model in your community, and who is trusted for your advice

Much of the advice about claiming and mastering your topic will be second nature to researchers because Burchard writes about understanding your audience, discovering their needs and offering advice that solves their problems.

Burchard discusses getting the right mindset and developing the right skill set for presenting your expertise. He takes the four P’s of marketing and gives his spin on them related to the expert business you are about to build, changing the Promotion element to Partnering with others in order to “sell” yourself and your expertise. Burchard then adds a fifth P: serving with Purpose.

Throughout the book, Burchard lists a series of “Expert Signposts,” which are questions to answer, pushing the reader to map out key issues. Many of these are simple, straightforward questions, while many get you really thinking. As with anything, though, it is the action taken after doing the exercises that makes the difference.

I get the definite feeling that Burchard knows his “stuff” and walks his talk, unlike many in the self-development field. Burchard treats his reader as an equal, rather than a “complete moron” who needs to be taken by the hand and walked along in baby steps. Even though this book is not a complete systematic manual for building your “expert” business, it is thorough in laying out ideas on how to build an expert business or “expert empire,” as Burchard calls it in one of the chapters.

After reading *The Millionaire Messenger*, I would say there is some useful guidance in it for those wanting to take an area of personal interest and develop an expert business around it.
WHY DID 250 COMPANIES MAKE CCR THEIR RESEARCH FIRM OF CHOICE FOR OVER 1500 PROJECTS IN 2010?

Trust.

For: Telephone Surveys • Focus Groups • One-On-One Interviews
Spanish Language Interviews • Mall Intercepts • Mock Jury Panels
In-store Interviewing • Taste Test Interviews
Mystery Shops • Coding/Data Entry • CATI Programming

Give us a call today.

In Houston:
Pati Brown
B.J. Gerjes
877.530.9646
ccrc@ccrsurveys.com

In Phoenix:
Yvette Cave
Dixie Cobos
877.906.0666
ccrc@ccrsurveys.com

CCR Creative Consumer Research
Exceeding Customer Expectations For Over 30 Years.
Qualitative Research Consultants Association:

Find a Qualitative Researcher
that is right for your project!

Qualitative researchers are just a click away!

Free access to nearly 1,000 researchers worldwide. Search by expertise, target or industry experience, methodology, geography, language, etc. Find the moderator, interviewer, planner or consultant who best meets your qualitative research needs.

QRCA has members who are experts in:

- Focus Groups
- Individual Depth Interviews
- Ethnography
- Usability Research
- Online Discussion Groups
- Idea Generation
- Web 2.0
- And many other in-person and online methodologies

Visit www.QRCA.org, click “Find a Researcher” and start searching!
Call for Authors: Publishing Opportunities

Editorial content for QRCA VIEWS is managed by an editorial team that includes the editor-in-chief, managing editors, copy editor, contributing editor and the features editors for each of VIEWS’ regular columns such as Qualitative Toolbox and Tech Talk.

VIEWS editors welcome QRCA members and members of the marketing research community to submit article ideas or manuscripts for consideration.

We review each manuscript on an individual basis to ensure that the article conforms to VIEWS’ mission and goals, as well as to the topic mix needed for each issue. Occasionally, we may save a manuscript to use in a future issue. We reserve the right to edit any manuscript or to change the title.

Submissions should be objectively written and supported by case-study examples. Self-serving articles or those that promote a moderator’s or a research company’s expertise will not be published in VIEWS.

Please remember that it takes a good deal of time for our editors to read through all the submissions. We will let you know as quickly as possible whether or not your article has been accepted for publication in QRCA VIEWS.

FAQs about Article Submissions
Will I see my article before it is published in QRCA VIEWS? Not always, as our tight publication schedule may not allow for author review of edited manuscripts.

Will I be paid for the time and effort I put into writing the article? Like most professional association publications, VIEWS does not pay contributors. However, since the magazine is distributed broadly in the research community, you will gain a good deal of visibility as a result of being published in VIEWS.

Can I submit an outline for consideration before I submit the completed article? Yes, you may submit a 50-100 word description of your story idea to the appropriate features editor.

My article was published in another journal or magazine. Can I send it to VIEWS? While ordinarily the preferred solution would be a substantial rewrite, we are willing to consider articles published elsewhere if, in our judgment, they seem both relevant and not likely to have been seen by a significant portion of our own readership. In addition, you must either assure us that you are the copyright holder and/or provide a letter of permission from the previous publication. If VIEWS publishes the article, the prior publication will be credited and cited in a footnote.

My article was published in VIEWS. Can I submit it to another publication? You will need to submit a request in writing to the VIEWS Editor-in-Chief. If we approve re-publication, we will notify you in writing, and we would expect the prior VIEWS publication to be cited in a footnote.

Writing Style Guidelines
• Write in the present tense and use the active voice as much as possible. Avoid the use of contractions, i.e., don’t, wouldn’t, can’t, etc.
• Footnotes, endnotes or lists of references are not necessary in a trade magazine such as VIEWS.
• Make liberal use of topic subheads to help readers scan your article and follow your main points easily.
• Please direct your queries and/or submit your manuscript to Editor-in-Chief Monica Zinchiak, at monica@zresearchservices.com.

Electronic Article Reprints
Authors who publish in VIEWS will automatically receive a free PDF file of their article (including that issue’s cover) as it appeared in the magazine. For a PDF file of the article with advertising removed, a company logo added and text relabeled, authors should contact Susie Barber at Leading Edge Communications, at susie@leadingedgecommunications.com. The fee for the modified-article PDF is $35.

We look forward to working with you!
INDEX OF ADVERTISERS

About Orlando Market Research ............................................. E ..... 74
www.aboutorlandoresearch.com

Adler-Weiner Research Company ........................................ E ..... 31
www.awres.com

Advanced Focus .................................................................... 17
www.advancedfocus.com

Baltimore Research ............................................................... E ..... 5
www.baltimoreresearch.com

Burke Institute ......................................................................... 59
burkeinstitute.com

ClearView Research, Inc. .......................................................... 35
www.clearviewresearch.com

Creative Consumer Research .................................................. E ..... E ..... 83
www.cccrsurveys.com

Dawn Smith Field Management Service ................................... E ..... 79
www.signature-research.net

Decision Drivers ....................................................................... 30
www.decisiondrivers.com

Delve .......................................................................................... 3
www.delve.com

Field & Focus ................................................................. E ..... E ..... 37
www.field-n-focus.com

Fieldwork .................................................................................... 51
www.fieldwork.com

First Choice Facilities ............................................................ E ..... 36
www.FirstChoiceFacilities.net

Fleischman Field Research, Inc. ............................................... E ..... E ..... 50
www.ffrst.com

Focus Coast to Coast .............................................................. Inside Back Cover
www.focuscoasttocoast.com

Focus Forward Transcriptions ................................................. E ..... 69
www.focusfwd.com

Focuscope, Inc. ................................................................. E ..... 61
www.focuscope.com

FocusVision Worldwide, Inc. .................................................. E ..... E ..... Back Cover
www.focusvision.com

Indyfocus .................................................................................. E ..... E ..... E ..... 75
www.indyfocus.com

Inside Heads, LLC ...................................................................... 7
www.myff.com

Interactive Video Productions, Inc. ......................................... E ..... E ..... 55
www.interactivevideo.com

J S Martin Transcription Resources ......................................... E ..... E ..... 37
www.jsmartintranscription.com

L & E Research ................................................................. E ..... E ..... E ..... 79
www.lereasearch.com

Market Research Dallas ......................................................... E ..... 77
www.marketresearchdallas.com

Maryland Marketing Source .................................................. E ..... E ..... E
www.mmdmarketingsource.com

MORPACEInternational, Inc. .................................................. E ..... E ..... 44
www.morpace.com

Murray Hill Center .............................................................. E ..... 45
www.murrayhillcenter.com

National Field & Focus, Inc. .................................................... E ..... E ..... 4E
www.nff-inc.com

Observation Baltimore ........................................................... 86
www.observationbaltimore.com

Opinion Search, Inc. .............................................................. E ..... 16
www.opinionsearch.com

Paramount Market Publishing ................................................ E ..... 44
www.paramountbooks.com

Puzzle Paris ............................................................................... 11
www.puzzleparis.com

Reckner / First Choice Facilities ............................................. E ..... E ..... 76
www.reckner.com

Research House, Inc. .............................................................. 25
www.research-house.ca

RIVA Training Institute .......................................................... 15
www.nivainc.com

Schlesinger Associates, Inc. ..................................................... E ..... Inside Front Cover
www.schlesingerassociates.com

The Livingston Group of Marketing ........................................... E ..... 29
www.executive-solutions.com

Think Group Austin ............................................................... 41
www.thinkgroupaustin.com

Trotta Associates ................................................................. E ..... 46
www.trotta.net

You asked for lab specialists.

- Three spacious, technology-friendly focus suites
- Traditional and non-traditional suite accommodations with observation rooms
- Two CLT facilities for up to 100 respondents
- Commercial and residential test kitchens
- FREE unlimited parking
- FREE shuttle to/from BWI Westin and BWI Sheraton

Observation Baltimore
5520 Research Park Drive • Baltimore, MD 21228 • 410-332-0400 • www.observationbaltimore.com

Experienced Recruiting Makes All the Difference!
FOCUS GROUPS... AND MORE

THE ALLIANCE OF INDEPENDENTLY OWNED AND OPERATED MARKETING RESEARCH CENTERS NATIONWIDE AND WORLDWIDE.

One call to
1-800-935-6561
and we can book your project with any of our member marketing research centers or affiliates

DISCOUNTS APPLY FOR MULTIPLE MARKET USAGE

- FOCUS GROUPS
- ETHNOGRAPHIES
- IN-DEPTH INTERVIEWS
- PRODUCT EVALUATION
- IN-HOME PLACEMENTS
- MOCK JURIES
- ON-LINE SURVEYS
- ON-LINE FOCUS GROUPS
- TASTE TESTS
- INTERCEPT INTERVIEWS
- FIELD MANAGEMENT
- EYETRACKING

Atlanta: Savitz Field and Focus (404) 760-7900
Boston: Focus Coast to Coast Boston (972) 386-4500
Chicago: Savitz Field and Focus (312) 377-1200
Columbus: Complete Research Connection (614) 220-4120
Dallas: Savitz Field and Focus (972) 386-4050
Des Moines: Harvest Research Center (877) 800-0785
Ft. Lauderdale: WAC of Ft. Lauderdale (954) 772-5101
Hartford: Focus Coast to Coast Hartford (972) 386-4500
Houston: Savitz Field and Focus (713) 621-4084
Indianapolis: Focus Coast to Coast Indianapolis (972) 386-4500
Los Angeles: Savitz Field and Focus (310) 642-4799
Miami: WAC of Miami (786) 364-2272
New York City: Focus Room of New York (212) 935-6820
Phoenix: Westgroup Research (602) 707-0050
Philadelphia: Focus Coast to Coast Philadelphia (972) 386-4500
Portland: VuPoint Portland (800) 344-8725
San Francisco: Ecker & Associates (650) 871-6800
Tampa: Schwartz Research Services (813) 207-0332
Washington, D.C.: Metro Research Services, Inc. (703) 385-1108
Westchester, NY: Focus Room of Westchester (914) 682-8404

Foreign affiliates are located in Europe, Asia, Canada, South and Central America

www.focuscoasttocoast.com
Connect with respondents anywhere in the world.

FocusVision Webcam Interviews

- Reduce study costs
- Expand your geographical reach
- Increase your speed to market

It’s like being there. Only better.

Stamford London Singapore
888.212.8009 [US]
+44 1892 556 597 [EMEA]
+65 6818 9015 [ASIA]
info@focusvision.com
www.focusvision.com