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BOOK REVIEW: Good Charts: The HBR Guide to Making Smarter, More Persuasive Data Visualization provides details for designing impactful charts along with contextual guidelines for matching specific data visualization to your specific audience.

BOOK REVIEW: Digital Context 2.0: Seven Lessons in Business Strategy, Consumer Behavior and the Internet of Things offers an excellent overview of the emerging Digital Context and what the Internet of Things can mean to consumers. It also provides a practical framework that can be used when designing qualitative research.

BOOK REVIEW: The Revenge of Analog: Real Things and Why They Matter is a fun, quick read that uses interesting case studies to argue that the digital revolution may be overstated and that business opportunities still abound in the analog world.

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Spring Is in the Air

Happy Spring everyone! Birds are singing in the trees, flowers are popping out of the ground, and a fresh issue of VIEWS magazine is arriving in your mailbox. Let me take you on a preview of the wonderful line-up of articles we have in this issue…

Our Luminaries column, in which we conduct 1-on-1 interviews with recognized leaders and innovators in the qualitative world, is featured on our cover this issue. Editor Kay Aubrey sat down with a true visionary in our industry, Clotaire Rapaille, whose theories on how cultural archetypes mold people’s unconscious decision-making have guided global corporations and political leaders. Part one of the interview is in this issue of the magazine, and stay tuned for part two in the Summer issue.

In Schools of Thought, Jim Mott presents a compelling case that ambiguity can be a better approach to delivering research findings for allowing clients to find the information they are looking for faster and to explore the findings for deeper insights.

Travel is soon to be much easier to arrange and endure as revealed by Deanna Manfredi in our Travel Wise column, as she explores what’s new in travel technology. Get ready for artificial intelligence software planning your next trip, where you will stay in high-tech hotels and language barriers are a thing of the past.

A pair of Toolbox articles gives you practical advice on common qualitative research challenges. Kelly Heaty and Jill Matthews show you how to plan and prepare for conducting research outside a traditional facility, while Wes Michael leads you through some tips and tricks for finding hard to reach respondents. In our Tech Talk column, Julie Francis explains how to prepare yourself for doing business in the new digital age, covering new laws about data security and privacy that are changing the contractual terms, obligations and liabilities between researchers and clients.

Alicia Menanteau shows in our Global column how she has put her qualitative research skills to work in helping refugees arriving in Europe, with lessons for us all about serving a good cause and applying our research talents in other aspects of life.

Then in Business Matters, Judy Storey Maritato provides strategies that qualitative Baby Boomers are using as they approach the next phase of their careers. And in Trends, Ben Skelton shares experiences that are bridging innovation with qualitative research as companies seek ways to “future fit” their brands.

We have another excellent quartet of Book Reviews as well. Susan Fader provides two reviews, Scott Berinato’s book on designing impactful charts and how to match specific data visualization to a particular audience and David Sax’s intriguing hypothesis that the digital revolution may be overstated and that business opportunities still abound in the analog world. Pat Sabena reviews Robert Cialdini’s book on “pre-suasion”, which shows you how minds get changed and how to be an effective persuader. And Jennifer Tillman takes a look at David W. Norton’s overview of the emerging Digital Context and what the Internet of Things can mean to consumers, including a practical framework that can be used when designing qualitative research.

Our latest Podcast features Steve August from FocusVision Worldwide discussing the history and future of qualitative research, an enjoyable and insightful treat for your ears.

Enjoy!
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MSAs and Qualitative Research

If you’re a qualitative researcher, or a buyer of qualitative research at a larger company, and haven’t been through it yet, brace yourself for a potential MSA onslaught. What is an MSA, and why the warning? MSAs are Master Service Agreements, and many large companies are being “encouraged” by their legal teams to have all research vendors, large or small, qualitative or quantitative, adhere to a uniform set of standards. Unfortunately, in many instances, these MSAs have become a “one size fits all” situation.

If you’re a solo practitioner or part of a small research company, you are probably saying, “Why me?” Because if you work directly with these larger companies or even subcontract to others who do, you will most likely be required to meet these established standards. MSAs can run from 20 to 50 pages or more and cover many areas including pricing, data security standards and procedures, insurance requirements, employee security screening (even screening yourself!) and much more.

However, the two areas that may cause the most concern, expense and work to meet standards are insurance and data security.

**Insurance** — this goes beyond a typical BOP (Business Owner’s Policy) and asks for coverage in areas such as E&O (Errors and Omissions) and even Cybercrime.
- Even though our qualitative reports should have a caveat about findings not being projectable, companies are not waiving their requests for E&O coverage.
- Cybercrime is the hotter new area, as more and more companies (JP Morgan Chase, Home Depot, etc.) are being hacked. Even though we are rarely responsible for Personally Identifiable Information (PII), companies are looking to get coverage on even the smallest breaches (think about financial repercussions or embarrassment if spreadsheets of respondents in high wealth or medical groups were compromised).
- Companies can ask for coverage of up to $10 million USD. However, companies may be willing to negotiate down based upon perceived risk, but probably not below $1-2 million.

**Data Security** — how are you protecting client data, including such things as emails between you and clients?
- Clients are asking for “Security Programs,” which include a “comprehensive security program under which the vendor documents, implements and maintains the physical, administrative, and technical safeguards necessary to comply with applicable law and to protect the confidentiality, integrity, availability, and security of Vendor and Customer Information.”

If you are a research supplier and haven’t faced the MSA onslaught of yet, you may want to proactively talk with your insurance agent about what it may cost to increase your coverages, should it become necessary.

Regarding expectations on security, a good place to start is the Federal Communication Commission’s webpage on Cybersecurity for Small Businesses at qrca.org/VIEWS-020.

If you are a research buyer, please think about the value that your smaller qualitative vendors supply, the low level of risk associated with the research they provide and the potential increased insurance and data security costs to them. Perhaps you can talk to/negotiate with your legal team about a tiered approach to MSA requirements so they are not so onerous to smaller companies that it becomes no longer economically viable for them to continue doing business with your company.

As MSAs will be an ongoing industry issue, please post your questions and findings on the QRCA Forum so we can keep each other up to date on complying in ways that are most cost and time efficient. Also, please feel free to reach out to me, manny@consumercenters.com, to see if I can help you through the process.

**Editor’s Note:** Read more about new data privacy standards that impact qualitative researchers on page 47 in Julie Francis’ article “Do You Know What You Agreed To?” Julie offers real-world, practical advice on how we can protect research data from breaches and limit our liability in the event something does go wrong.
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You might call it whimsy, but it was also a thought experiment with an active question that drives to the heart of how we conduct and present ourselves as an industry. What happens when you eschew explanation and clear answers in favour of exploration and ambiguity? The results point to the future of a rather different kind of insight landscape. It’s a future that’s emerging right now. It’s exciting, as it’s one we know clients are also excited by and, crucially, are willing to pay for.

Getting to the Point
Before we get to the future, let’s look at where we are now. Our industry thrives...
on giving clear, succinct answers. We get to the point with a headline that wraps up the business issues in a few short words. We make our case in 30 slides or less, packed with punchy and actionable insights.

This is undoubtedly a very good way of doing things. It’s lean and gets to the point. It’s a way of producing working documents that add value as soon as they land. It makes sense because, frankly, no one has the time anymore to sit through pages and pages of deadening statistics and reams of quotes from earnest consumers.

We know that time is increasingly precious and that our attention spans have dwindled, less than a goldfish’s by some reckonings. No matter how compelling we think our work may be, many clients will be pulled away to the next urgent thing almost before we’ve even finished presenting, which doesn’t leave much room for fat.

This is our reality, and it makes for a dynamic way of working, but it is also dangerous. The imperative towards succinct, snappy answers can over-simplify things, creating closed systems of explanation where everything has been accounted for but nothing is left to explore, appetites are sated, and curiosity is killed. Chase too far down the route of succinct, simple headlines and we find ourselves in danger of creating ‘dead-on-arrival’ documents that are buried and never referred to again. Paradoxically, in delivering exactly what our clients want, our value to their business diminishes over time.

We believe it is imperative to be succinct but also to provide granularity and depth. We also believe that the two are not mutually exclusive and that the future of insight is about finding a way to bridge that gap. We believe it is possible to do exactly this if we reframe our activity from a drive towards efficiency of explanation and more towards enabling exploration.

Making it Commercial

This is where the premise behind the original Dogtown microsite comes into play and finds itself with a much more hard-edged, commercial application. We want our clients to encounter what we do with a spirit of exploration. Both because it’s a better way of conveying information and because it provides longevity to our products and adds value by giving our clients a reason to return. We still want clients to come away with clear answers to their business questions, but we also want it to be clear that there is more to be uncovered and that digging deeper offers the opportunity to add longevity that will outlive the initial business question that triggered the research.
So what exactly does this look like in practice? How do we cater to brevity and clarity on the one hand and rich granular understanding on the other? We would argue that the answer lies in a reappraisal of the nature of how we package and present the work we produce as insight professionals.

To use a concrete example, at the time of writing, we were in the process of concluding a large-scale, multi-market project investigating the cultural lives of truckers for a blue-chip global client. Our objectives were twofold: 1) to provide rich, granular information on what it’s like to be a trucker in each of the markets (U.S., Brazil, India, and China) and 2) to understand the opportunities for upselling our client’s product. In terms of delivery, we also needed to consider client audiences at both a local market and global level.

**Delivering Exploration**

Applying the principle of exploration to a project like this (or, indeed, any other) has a twofold set of implications.

First, on a technical level, we need to think beyond linear methods of presenting information and embrace structures that readily lend themselves to a more exploratory, free-wheeling approach. We mean something quite specific and rather obvious here, namely the language of the digital age, hypertext. By enabling information to be linked in a non-linear fashion, hypertext enables the layering of multiple alternate means of navigating information. A hypertext-based report (i.e. housed on a website rather than on a PDF or PowerPoint document) has the advantage of enabling the viewer to navigate through research findings quickly and to head directly to the information that is most relevant to them. Careful web design means that pathways are planned but not dictated. There is always an alternate route that can be taken next time around.

For our trucker client, the output has been exactly that — a website that houses the insights and information gathered in the research, but thought through as a hierarchy of information that enables the viewer to engage as deeply or superficially as they wish. At the same time, a web-based approach also helped solve the local market team versus global team issue. The website caters to both by offering a clear way to navigate between both levels at all times.
It is possible to be succinct but also to provide granularity and depth if we reframe our activity from a drive towards efficiency of explanation and more towards enabling exploration.

The other issue we raised as driving the need for a more exploratory approach to insight is the fact that any efforts at granularity must counter the basic fact that people’s attention spans are short. If people can’t get past the front page, they won’t ever understand all those precious nuances the researcher inside all of us is so desperate to preserve. Again, the solution here is not a particularly clever one, but it’s only now beginning to gain serious traction within the industry. In this case, it is again to go beyond the written word and use a broader repertoire of techniques to communicate richer and deeper meanings more quickly and efficiently. The use of rich media and thinking in a more visual way is central to this.

Back to our trucking example, to convey the meagre facilities of an Egyptian truck stop or the mindboggling scale of a Chinese truck stop requires considerable wordsmithing, whereas an image does the same job in a minute. Any attempt to describe the atmosphere in a bar in the U.S. where exhausted truckers chat away the late night hours simply cannot compete with an immersive 360 VR experience of the place. Instead of simply listening to our descriptions, our client can freely look around and see for themselves what is going on. These are the tools we as an industry now have at our disposal; we should be using them.

This is about countering lack of attention with densely packed brevity. What you can show with an image or a short video clip is simply more engaging and, in all likelihood, less time-consuming than if the same job were to be done through text alone. Going beyond the idea of simply saving time, we can say that images also convey a meaning of their own when composed by a skilled photojournalist or videographer. Indeed, we can use images to precisely refrain from explanation. Images invite multiple readings; ambiguity provides gaps through which original thoughts can emerge.

We know that using imagery in this way works because it has been part of our way of doing business for many years. We know it worked in the case of our trucker research because we were commissioned to add an additional five markets to the study once phase one had concluded. By building ambiguity and exploration into our project from the start, we gave ourselves a much better chance at achieving a long-term relationship with our client.

Concluding Remarks

Just as we invite our clients to explore and to withhold from clear answers, we find that throwing some ambiguity into our own process as researchers in the field also has unexpected benefits. Stepping outside of what are often very controlled and artificial environments where research is typically conducted and into the jumble of the real world is as intimidating as it is easy. Spending an additional ten minutes to wander the neighbourhood of the respondent you just visited throws up unexpected things, but it also vastly enriches your experience of who that person is and makes you all the more likely to return to what you learned from them again and again.

In conclusion, we must emphasize that explanation and clarity are not our enemies. We do not call for a return to those thesaurus-fired-out-of-a-shotgun style reports, but we also say that ambiguity and exploration are allies of old who do not deserve to be pushed to the sidelines. Frankly, as the world in which we and our clients work continues to evolve, the time has come to put them right back where they belong, on centre stage.
Between 2015 and 2016, Europe experienced a humanitarian crisis with the largest influx of migrants and refugees since the fall of the Iron Curtain. Families, unaccompanied minors, women and men have undertaken treacherous journeys into Europe, towards Germany and Sweden in particular. Half of the refugees in 2015 were from Syria, Afghanistan, and Iraq. African migrants, such as Eritreans, Nigerians, and Somalis have travelled the dangerous route from Libya to Italy. In 2015, a record 1.3 million migrants applied for asylum in the 28 member states of the European Union, Norway and Switzerland, with Germany receiving the highest number of asylum applications: 442,000 in 2015 alone (Eurostat, reported by the Pew Research Center, Aug. 2, 2016).
During my childhood, the Pinochet dictatorship prevented us from returning to my father’s native Chile to make it our home again. Because of this history, my cause has always been human rights. My doctoral work on AIDS got me involved in social justice issues, especially women’s rights. Now I’m leveraging my skills, talents and empathy to support the European refugees.

My intent with this article is to challenge you to think about how you can use your skills as a researcher and other talents, resources, and privileges to contribute to a global or local cause. I’ll share what I have done with the refugee crisis and offer some useful learnings I gleaned along the way. You can consider these as you commit to your own cause.

Use Your Research Skills and Unique Talents.

In September 2015, I intended to visit friends in Vienna for a week as a belated summer holiday: enjoy the opera, coffeehouses, and museums and breathe in my favorite city. But I couldn’t reconcile this vision with the reality hitting Europe: a stream of refugees arriving by the thousands. “I'm a sociologist. I capture people’s stories. How can I help?”

Before I travelled, I reached out to some non-government organizations (NGOs) and friends to offer assistance. In my email, I indicated that, as a sociologist, I could help them capture and document refugee journeys, record stories, provide translation, or simply listen. These are skills we take for granted, but we use them in every research project we undertake. Apply them to your cause.

Tap into Your Contacts.
Conduct Informational Interviews.

A friend from my first visit to Austria in 1992 secured my meeting with the communications director of the non-profit Islamic Religious Community Organization of Austria. My contact there suggested I go to the main train station to offer my assistance and to capture refugees’ accounts of their journeys. After this one meeting, my vacation plans pivoted. For a week, I stationed myself at the main train station, helping refugees find their way. I spoke to Austrian volunteers. I went to the University to speak to a professor who had been active at the Austrian/Hungarian border. I called a Syrian student whose number I found on a campus bulletin board; he became my local Arabic tutor and interpreter. We communicated in German, and with his help, we wrote a
The European Refugee Crisis, Choice, and Committing to a Cause CONTINUED

She got emotional and said, “This is the best day.” I replied, equally as emotional, “We are sisters.”

As in Our Research, Remember to Laugh at the Unexpected.

I had an “Elaine Moment” (from Seinfeld) when I helped Ahmed (not his real name) from Iraq finish the final leg of his arduous journey to meet his uncle in a small Austrian town. All he had was the town’s name, scribbled on a scrap of paper. After a brief Google Maps review, I confirmed the nearest train station and wrote a German placard for him, indicating his destination and requesting help to make his connection. The joke was on me, though, when it turned out that I had put poor Ahmed on the wrong train! Thinking he was safely on his way, I sat to interview his friends in the main hall, and suddenly Ahmed reappeared! After the initial shock, we all agreed that the little placard had already come in handy.

Make a Company Contribution. Involve Your Clients.

When I returned to Vienna in April 2016 for the QRCA Worldwide Conference, I fulfilled a private promise I had made to this cause. Instead of holiday gifts to all my clients, I returned to the same non-profit with a contribution from my company, on behalf of my clients. They arranged a formal meeting with tea, sweets, and photos. Upon my return to the U.S., I shared these photos and the experience with my clients and acknowledged that it was thanks to their business that my company was able to make this contribution.

Donate Your Time to Causes You Believe in.

Your contribution may not necessarily be money. Over the summer, I was one of several co-hostesses at an annual garden party for The Advocates for Human Rights in Minneapolis. In this role, I recruited 15 friends and helped spread the word about the important efforts of this non-profit, including helping to implement laws to protect victims of sex-trafficking in the U.S. The Advocates put together a page with ideas of how we can all support social justice; this link will send you there: qrca.org/VIEWS-021.

Expect Unexpected Returns.

A contribution I made allowed an attorney to present at an international human rights conference in Berlin in October 2016. To my surprise, this opened up an opportunity to attend the conference myself as an organizational partner. I attended sessions about women’s rights, specifically how refugee protection is a fundamental right not always granted at European reception facilities. Experts presented how female asylum seekers in Europe are especially vulnerable and that many are denied specialist support service such as shelters, counseling and medical services due to their undocumented status.

Be Curious. Use the “Outsider Card” to Ask Questions.

Intrigued by the growth of the weekly anti-refugee protests in the Saxon town of Dresden (in former East Germany), I decided to travel there to find out what fueled the anti-refugee movement. Since October 2014, weekly protests have been held in the city square on Monday evenings. Every Monday…except for the Monday I was there!

My plan was this: Fly into Berlin and take a train to Dresden in Saxony, shower and then meet an interpreter I had arranged through the hotel (safety in numbers). Go to the Monday night PEGIDA* protest and get perspectives. Unbeknownst to me, the mayor spontaneously organized a city-wide counterv-protest, “Dresden, Show Yourself,” with multicultural musical performances and speeches from community members and church and pro-refugee leaders. This was alleged to be in reaction to the embarrassment the city experienced when PEGIDA protesters verbally attacked Chancellor Merkel, who visited Dresden for the events surrounding the 25th Anniversary of the Reunification of Germany in October.

*A nationalist, anti-Islam political movement founded in Dresden in 2014.
Undeterred, I spoke to seven distinct segments during my 24 hours in Dresden: business owners, parents with children, police, city officials, volunteers who have worked with refugees, representatives of the Left (die Linke), and Germans skeptical of their government’s migrant policy. I used the “outsider card” and asked each group to explain their perspective, indicating that I was truly interested in learning about what was happening in their city and why this anti-refugee movement had taken such a hold in Dresden, where there were relatively few migrants.

Space does not permit a full report of findings from this personal research, but their narrative, broadly, goes like this: Saxons have been forced to undergo enormous changes since reunification, and their expectations have been largely unmet 25 years later. Compared to the West (Germany), they have experienced economic disappointments and hardships — factory closings, high unemployment, low wages, and reduced pensions. Their historically homogeneous, closed, secular and aging society is suddenly joined by thousands of young migrants from foreign lands, all in need of social assistance and many of whom define themselves by their religion. In short, the Saxons I spoke to throughout the city of Dresden believe that life and German culture as they know it is being threatened by the influx of refugees (fear and uncertainty…emotions shared by the refugees themselves).

Invest in Yourself and Your Passions. Pass it on.

Learning languages makes me feel alive. I literally can feel my mind expand. This summer, I planned to study Arabic for a week in Tetouan, Morocco. In preparation for this trip, I arranged to meet an Egyptian tutor I found on the Wyzant tutoring app. A few Sunday afternoons together at Starbucks and I was good to go.

I didn't have high expectations for how much Arabic I could learn in a week, but now I can at least offer a kind word to an Arabic speaker or offer them assistance. As noble as this sounds, the joke was once again on me! QRCs know that we take our vacations between projects, so I did not have much choice. My trip to Morocco coincided with Ramadan. And while it was culturally interesting to witness, especially families’ sundown gatherings in the city center, the restaurants and other commerce were on holiday schedules, and I was ravenously hungry the entire trip!

However You Choose to Do it, Do it.

Many organizations are looking for volunteers. You don’t need to do it alone or travel internationally or even learn another language as I did. There are many opportunities to take a stand in your local community. Everybody has a role to play. You can choose what your role is. Go beyond the business and use your strengths as a researcher for the good of a cause.

For me, doing this work has evoked feelings of gratitude for the relative safety and security my family and loved ones enjoy living in the U.S. That’s all most refugees and migrants told me they wanted for themselves and their families: to be safe. We all share this basic human need. It’s even clearer to me now that understanding our commonalities as humans builds empathy, regardless of our heritage and life experiences.
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Dr. Clotaire Rapaille is a cultural anthropologist and founder of Archetype Discoveries Worldwide. He is best known for having written the New York Times bestseller The Culture Code: An Ingenious Way to Understand Why People Around the World Live and Buy as They Do. In part one of our interview, presented here, Dr. Rapaille describes the systems behind the code and how it shapes the way we respond to products and concepts as adults.

Kay: What is the Culture Code?

CR: The reptilian brain always wins. That’s what The Culture Code is all about. We have three brains: the reptilian, the limbic, and the cortex. The reptilian is about basic survival, basic instinct. It is short-term. It’s pain and pleasure. It’s so strong.

There is a window in time in each culture to learn about something. My theory about imprinting comes from Konrad Lorenz. He said there is a window in time for animals to imprint who is the mother, what danger means, and so on. The same theory can apply to humans. I think we have a window in time. That was the first important discovery.

Second, there is no learning about anything without emotion. The more intense the emotion, the stronger the imprint. There are differences from one culture to another. When you learn a word, you learn more than the word — the whole culture goes with it. It’s a package. You get so much with a word.

In French, when a child learns “le soleil” means the sun, they learn the sun is male... interesting. In the French culture, the male shines, males are brilliant. Men bring the light, and this is so natural in the culture.

But then, they learn about the moon, “la lune.” Ah, it’s a female. When they learn “la lune,” they learn what it means to be a woman. Women are always moody. They go up and down. They’re active at night. They have some hidden power. Suddenly there is this dichotomy between men and women.

When you go to Germany, just across the border, a child learns the opposite. Wow! Germans say, “Of course the moon is the male. Of course the sun is a female. Only the female can shine. The female brings light. The female makes things grow. They are warm. They are beautiful.” This is clear. And German men, they are always like the moon. They are up and down. They’re always active in the dark. So up and down all the time, you see? I’m not making any judgments here — the point is they are opposite. Wow! So maybe we can understand why the French and the Germans have always had a hard time understanding each other. It’s not just territory to fight wars. It’s cultural, very deep cultural differences here.

When you have a strong emotion, you produce neuro-transmitters in the brain.
that create the imprint and make the mental connection that your brain gives you for the rest of your life. The mental structure imprinted at a very early age is usually unconscious and that's what the Culture Code tries to discover. Each culture has a code and every element of the culture has its own code.

Kay: How do you access this initial imprinting in your work with adults?

CR: We do “imprinting sessions” where we take groups of people from a particular culture, 20-25 people per session. The first hour explores the cortex, where we get all the clichés and stereotypes. We don’t learn anything new there. In the second hour, we go into the latent structure. Then in the third hour, which is the most important, they lie down on the floor; we dim the lights. We play a relaxation tape. We take them back in time to their first imprint as a child on what we want to understand.

During the third hour we recreate the mental activity that you have when you wake up in the morning, when you’re still in your dreams and the cortex is not a filter. You’re still sweating if you went through a nightmare or something like that. So you still have the emotion and the feeling.

They lie down on the floor. It's anonymous, which is very, very important because they’re not going to be judged. They’re not going to be evaluated. We take them back to the first imprint. And then we have them write that down on a piece of paper but without putting their name. They pick to do it or not to do it.

Kay: Can you give me an example of how you used this technique to transform the way a product was marketed?

CR: When we did work for Folgers we asked people, “Let’s go back to the very first time in your life when you realized what ‘coffee’ meant.” What is the meaning of this word? When we did that in America, so many people went back to when they were two years old. When you are a two-year-old, you don’t drink coffee. So what do you imprint? Well, you imprint the aroma, the smell. So now what is the reference system, the emotion? It’s something like mother making breakfast. She’s preparing coffee. She’s going to feed me. She loves me. I’m happy. I’m home. I’m safe. All that positive feeling associated with the aroma of coffee. Wow!

We asked them what was the most important experience with coffee you had in your life — we discovered that when you are a teenager under peer pressure, you try it. And you don’t like it so you put milk, cream, sugar to hide the taste. It’s an acquired taste. P&G went to hard data and found that 90+ [percent] of Americans love the aroma of coffee, but only 42 percent love the taste. Oh! Bingo! So you’re not in the taste business anymore. You are in the aroma business. And what we said at the time is that Folgers should own the aroma, everything. And then we designed communication around aroma; coffee is aroma, there’s no question.

So they created this fantastic commercial with a young guy coming back from the army in uniform — now, every detail is on code. Why is he in uniform? Because we know that aroma means home and safe. Safe means there is danger outside. Danger means the army, you fight. And so the guy’s coming [in] from danger and he’s arriving home. Why is it important to have him arriving home? Because in America, you score when you go back home. Like in baseball. Arriving back home has a very powerful emotional dimension. Mother is upstairs asleep when he arrives. He goes directly to the kitchen. He opens a can of Folgers — we prepared the packaging so when you open it, you get the aroma in your face. KaSHHH.

He prepares coffee and the aroma goes upstairs. The mother smells the coffee aroma, she opens her mouth. We know exactly the words she’s going to say because aroma means home and safe. So she says (gasp), “He’s home! He’s safe!” She rushes down the stairs and hugs the boy. When we tested the commercial people were crying. I said, “Come on. This is just coffee.” No, it’s not just coffee. It’s reactivating the first imprint of something that is so emotionally positive and associated with all the reference systems. So we discover these dimensions that are so powerful, but usually unconscious. You cannot ask people, “Tell me what you’re not aware of.” We have to discover that.

In the next issue of QRCA VIEWS, we will present part two of this interview: using the Culture Code to understand why Donald Trump won the U.S. presidency and how to market products and services in a globalized world.
Technology infiltrates all aspects of our lives, from work to socializing to fitness and wellness. It also plays a huge role in travel. What technology solutions will redefine the way we think about travel in the next few years? Here are some tech trends that are about to redefine the travel experience:

**Overcoming the Language Barrier**

One of the biggest challenges to international travel is coping with language barriers. Technology solutions may soon make the language barrier a thing of the past. The ili Translator by Logbar is an instant wearable translator that works with English, Chinese and Japanese. It’s a pendant you speak into that then...
Another option is the Pilot by Waverly Labs. It's an in-ear translation bud that works offline, and it comes in pairs of earpieces for both conversational participants. The Pilot is starting with Latin languages, with later arrivals for East Asian, Hindi, Semitic, Arabic, Slavic and African languages.

**Charging on the Go**

Electronic devices always seem to run out of charge at inopportune moments when we're on the road. Never run out of power again when you travel with your own chargers on the exterior of your carry-on sized smart travel case. The Raden A-22 has a rechargeable battery stowed behind the bag’s lining and is accessed by three ports at the top of the case near the handle. It has two USB ports and one smaller port used to recharge the case battery. The Raden battery takes 5 to 10 hours to charge up (depending on the power source) and then it can fully charge a mobile phone up to four times.

The functions are controlled and monitored via an iOS smartphone app, which can locate your case, weigh it, give your airport’s TSA wait times, and show how much battery is left. The location function can alert you when the Raden is headed your way at a crowded baggage claim carousel. It even tallies how many cities and countries your case has been to.

**BYO Wi-Fi**

Few things are more frustrating than not having access to Wi-Fi when you’re on the road. Wouldn’t it be nice if you could just “bring your own” (BYO) Wi-Fi with you? It’s now possible. The Venture Backpack by This Is Ground comes with its own built-in Wi-Fi. The bag is available in two TSA-approved sizes and is imbued with the smell of quality leather. The wireless Internet is supplied via a palm-sized device by Karma Go that has several plans, either as a contract-free auto-refreshing plan ($40-$140) or pay-as-you-go ($15 per GB), and comes with an introductory 100 MB to get you started. It sends an email notification when it’s time to charge the battery and has tracking capability provided by Tile.

**High-Tech Hotels: Mood Lighting to Robots**

Hotels are providing more and more high-tech amenities to draw in both business and leisure travelers. One new amenity is called Smart Lighting. Get ready to select from a spectrum of colored LEDs to not just illuminate your room but also enhance your mood. Select blue light to calm you down, red light to charge you up, or bright white light to reduce jet lag. Some will also offer circadian bedside lighting to promote better sleep.

Another high tech hotel amenity in development is voice activation technology. You can soon look forward to controlling the heat and air conditioner in your hotel room with voice commands. Wondering if you’re going to need that umbrella? Just ask your room for the weather report before heading out. The Aloft chain is currently piloting the first-ever voice-activated rooms powered by Siri and Apple HomeKit.

Land lines, room keys, and remote controls are on their way to extinction. Apps similar to Apple’s HomeKit are being rolled out in hotels across the country, letting guests manage everything from room selection to restaurant reservations from their phones. The apps also unlock guest rooms, eliminating worries about lost or inactivated key cards. And forget about missing your favorite programs while you’re on the road — Aloft’s RoomCast allows guests to securely stream video from their devices to their room TVs.

And with what is perhaps the coolest hotel high tech amenity, select properties from Starwood Hotels & Resorts and InterContinental Hotels can now deploy a robot named Relay to deliver snacks and amenities to guest rooms. Soon we can all look forward to receiving room service late at night or early in the morning without the awkwardness of greeting a live person in our PJs.
AI Travel-Planning Assistants

Talk to any person in the high tech industry and they will tell you the next great technological leap forward will come from deep machine learning and artificial intelligence. Travel companies are already leveraging artificial intelligence to offer the personalized touch that used to come from travel agents. These tools process huge amounts of public data and (with the user’s permission) mine your email and calendar to provide personalized recommendations with minimal effort.

In May 2016, Kayak co-founder Paul English launched an iOS app called Lola (a portmanteau word made from longitude and latitude). This app combines advanced processing ability with human judgment. When the user submits requests via a messaging tool, Lola applies the preferences in the user’s profile (e.g., aisle or window, high-end hotels or affordable B&Bs), and a team of agents delivers a start-to-finish travel plan.

For $19 a month, business travelers can subscribe to Pana. This year-old app (iOS and Android) offers a hybrid of computer and human expertise to help business travelers book flights, hotel rooms, transportation, and restaurants, as well as assist with changes and problems along the way. The Pana experience begins with a Welcome Call so the service can note all your travel preferences (e.g., preferred airlines, seats, time of departure). Booking a flight then becomes as simple as texting Pana that you need a flight to Los Angeles next Tuesday. When you arrive at your destination, Pana becomes your personal concierge with recommendations for restaurants, sites, concerts, sporting events or any other activities that interest you.

The Hello Hipmunk booking site’s “travel planning assistant” doesn’t require you to download an app or even visit the website. Hello Email and Hello Calendar glean travel preference info from your email threads and calendar. It’s like looping in a travel-agent friend and letting him do all the unpleasant parts of travel planning, from flight comparisons to hotel searches. All you have to do is email your travel request to hello@hipmunk.com, and in response Hello Email will instantly provide flight options and hotel suggestions via return email. Hello Calendar anticipates users’ upcoming travel needs using their Google calendar. As with Hello Hipmunk, it negates the need for users to conduct an online search. Users just give Hipmunk permission to access their Google Calendars, and Hipmunk periodically scans them to find events that users are attending in another city. It then emails flight, train, and hotel information for those travel dates.

A Glimpse of the Future

Twenty years ago, most of us never could have imagined that we would be using smart phones with touch screens and voice recognition technology. It’s probable that 20 years from now we’ll wonder how we ever lived without artificial intelligence that understands and anticipates our needs and helps us proactively. In many ways, the travel industry is leading this charge. From instantaneous language translation to robots delivering room service, travel is about to get a lot more interesting. And thanks to artificial intelligence, travel planning is about to get a whole lot easier.
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Baby boomers face the prospect of longer productivity spans than previous generations. As a result of advances in health care and changing social norms, working life may extend 10, 15 or 20 years beyond the historical retirement ages of 65 or 70.

Demographers conjecture that this lengthening span creates an opportunity for work/life stages never experienced before. So, what are boomer qualitative researchers planning to do with this new opportunity?

My own plans, as I’m looking down the pike at 65, are to stay engaged in my business. Like many of the readers of this article, I have a rich knowledge base built up over many years of projects. This, combined with a diverse and delightful client and partner base, provides ongoing rewards well beyond simply earning a living. I’m not ready to give that up and for me, right now, that’s how it would feel… like I’m giving it up!

But the reality is that every boomer that I speak with has a different vision for what they want their 65+ years to look like. The good news is that this stage of life can
become just about anything that you want it to be. Described here are seven career frameworks that boomer researchers are using to design their 65+ years, their Career 2.0 stage of life. In them, I hope you find inspiration for what your own Career 2.0 becomes.

**1. Full Speed Ahead:**

*Keep working so long as the phone is still ringing... or the texts or emails are coming in*

Many boomer researchers are happy to stay on track with their work as long as possible. As one long-time researcher noted, “When business is good, it's pretty great, giving me flexibility and variety, and, let's face it, it pays pretty well.” Yet, the natural attrition that occurs when direct clients retire and the regularity of organizational changes on the client side means that boomers who desire a full pipeline of work must continue the essential activities of business development and continuously building a career network.

Boomer researchers benefit from a long history of client connections, and in a business where a good moderator stands out, their work can be recalled years later by clients. As one person noted, “It's wonderful when clients come back to you as a reflection of your quality work. I also have clients I’ve worked with steadily for 35 years.”

Keeping in touch with former clients, no matter how long ago the last project wrapped up or your last communication occurred, is a success strategy for many long-time moderators who have been surprised and gratified when clients reconnect after a hiatus of many years. Also, as another professional pointed out, sometimes projects have long — even multi-year — lead times. A project discussed in theory may not get prioritized and resourced for many years. Staying top of mind for that project when it does come to fruition is important.

Boomers who desire to proceed full speed ahead have found it valuable to have an active presence on social media platforms such as LinkedIn to facilitate connections and make it easy to share an update or quick message to stay top of mind.

**2. Dialing it Back:**

*From full time to part-time/my time*

The project-based nature of market research allows for a part-time schedule more so than many other professions. As boomers reach retirement age, this flexibility to reduce or re-arrange work hours for qualitative projects can allow time for other priorities, including family, travel, volunteer work or other important pastimes. Easing into a semi-retirement schedule is very feasible for the independent researcher.

Yet, this partway approach may not be for everyone. One professional tried...
Boomer researchers have to consider the degree to which they want or feel compelled to give up their long-term client relationships. For some boomers, staying in the game will be more important than to others.

it and soon realized that her clients’ expectations of her availability during traditional business hours of the workweek conflicted with her personal priorities to spend more time with her husband and hobbies. But for others, extended times offline can be accommodated, especially with preferred clients with whom they have long and trusted relationships and can notify of pending off time well in advance.

3. Narrowing the Scope: Specializing

Another model for career development is to focus on specific areas, referring non-core projects to other practitioners. Options for this narrowing include three types of specialization:

Specialization by industry or market segment. Over the course of multi-decade careers, many researchers settle into one or two core industries. Some may decide to focus only on business to business markets (B2B), fast moving consumer goods (FMCG), kids and teens, or one or two large market segments or demographic groups. Experience and knowledge gained from multiple projects within an industry and with a specific target audience give professionals deeper background and insight into client pain points and help clients maximize project value and return on investment.

Specialization by project type or mode. After conducting a wide variety of projects, some qualitative pros find they enjoy the interaction of interviewing or moderating groups but want only minimal involvement with report production. For other researchers who’ve decided they don’t want the hectic travel of coast-to-coast fieldwork, handling the reporting tasks and deliverables can be a desired focus area.

Specialization by methodology. Some researchers are moving into online-only or phone-only qualitative rather than in-person groups. Advantages of this choice are increased flexibility, sometimes reduced costs, and less focus on a moderator’s appearance, potentially avoiding client and respondent ageism.

4. Broadening Horizons: Branching out to build on experience using transferable skills

Many options exist for a boomer qualitative researcher to explore new territory and challenges in his or her career. Here are ways you might broaden your horizons (and offerings):

Online qualitative research continues to be a growing area. While in-person research will always have a place, the convenience and geographic reach of online groups and qual boards are a good fit for those who opt to step back from heavy travel.

Social media monitoring/listening is an emerging need that can benefit from a qualitative researcher’s abilities to probe for insights and analyze for themes.

UX (user experience) research shares much in common with traditional research approaches. Given some re-training, qualitative researchers are well able to bring their experience to bear and make strong contributions to this field.

Facilitation for groups needing to accomplish specific goals such as ideation, strategic planning, and problem solving can be a natural extension of a moderator’s skills.

Strategic planning work has also been a common progression for researchers, building on the knowledge base gained within an industry.

Mediation capitalizes on the listening skills qualitative researchers have honed over their careers as well as their ability to synthesize points of view.

Writing blog posts or articles can be a way to leverage knowledge and enhance one’s reputation within the industry, with the depth and breadth of subject matter expertise developed over multiple projects.

Additional services to a core industry. Subject matter knowledge gained over the course of many projects can be an asset to offering other services such as communication reviews, strategic planning, or business development efforts.

5. Flip the View: Go independent or go client-side

Striking out on one’s own is a typical pattern of career development for boomer client-side researchers. Non-compete agreements can limit options, but an interim step of contracting back to the current employer makes it possible to step outside of past roles while soliciting new non-competitive clients. Alliances
and partnering can also enhance business opportunities for independents. Moving into a client-side role is also feasible, although more typically from the research supplier and less commonly from a freelancer role. Most independent researchers find that once they make the shift to being out on their own, the benefits most always outweigh those of a traditional full-time employee role.

6. Knowledge Sharing:
   Mentoring/coaching others
   Experienced boomer researchers can also develop a new or side path in teaching and mentoring, both in academic settings and through professional associations like the QRCA. Blogging is another way to share learnings from project experiences and provide guidance around qualitative project challenges and issues. “You hate to let your wisdom go away,” as one retiring professional commented.

7. Hanging up the Skates:
   Full retirement. “When it’s time, you just know…”

   After a full and diverse career, many practitioners reach a point in their lives when they are ready to prioritize other interests: travel, family, volunteering, hobbies or entrepreneurial dreams. Knowing the right time to make a shift is typically reached after thinking about it for a few years, because the trigger is usually more than just reaching a financial goal. It’s more common at this stage of life that something finally clicks, and it’s clear that it is time to move on.

   For some professionals, achieving financial security gives them the freedom to shift their focus from making a livelihood to helping others. As one retired qualitative professional remarked, “When you don’t have to work for income needs, it becomes more about new opportunities to give.”

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Four Factors to Consider as You Choose Your Career 2.0 Path

Boomer researchers have to consider the degree to which they want or feel compelled to give up their long-term business relationships. For some boomers, staying in the game will be more important than to others.

You need to consider four key factors as you look to define which career 2.0 pathway is best suited to you.

Factor 1:
Your willingness to stay fresh with in-demand skills

   Keeping skills up to date and relevant will continue to be critical, underscoring the need for re-training and up-skilling as pointed out in the book The 100-Year Life (Gratton and Scott, 2016). Tools for ongoing learning or career exploration are available through resources, including AARP’s “Life Re-Imagined” course (qrca.org/VIEWS-025), as well as the Encore group (encore.org), which aims to move experienced workers into new careers with tools to explore alternative career paths.

Factor 2:
Your energy and stamina

   Staying on your game will require the energy and stamina that well-paid professionals are fortunate to access through better health care and longevity resources. Those blessed with naturally high energy also have more choices.

Factor 3:
Changing social norms and client expectations about boomers in the workplace

   Boomers may be at the vanguard of change simply by staying engaged in the workforce in large enough numbers to break down stereotypes that have previously edged older generations out of the workforce.

Factor 4:
Flexible options for managing “road warrior” fatigue

   More than one practitioner has pulled back from the grueling travel demands of qualitative research. While racking up frequent flyer miles and seeing new cities can be rewarding in early and mid-career, after a few decades the excitement can give way to thoughts of “how soon is the next flight home?” New travel options such as on-demand plane ride sharing or high-speed rail lines, as well as improvements in qualitative software and communications technology platforms, may ease travel challenges.

   As boomers age, their ability to maintain health and vitality will be key to expanding their working years. The 100 Year Life builds a case that boomers will enjoy unparalleled opportunities for continuing their contributions to the workforce and society at large. In this context, the Career 2.0 future for boomers who are qualitative researchers is promising. By adopting some of the new strategies and work norms presented here, researchers can add another 5-20 happy, productive years to their careers.

What about you?
How will you write your next act?
The possibilities are limitless!

As boomers age, their ability to maintain health and vitality will be key to expanding their working years.
Prepare for the Unknown, Plan for Success: Research Outside the Facility

Sometimes nothing takes the place of conducting research in the purchase environment, so get out there! Take your research into a store, restaurant, convention center, or other location where consumers make important purchase decisions. In-context, moderator-led research (aka in situ research, shop-alongs) yields rich insights by providing the context for observing and understanding influences that drive consumer decisions. Research outside the facility is complex, with many elements and dimensions to consider. The following are tips to help you execute a successful on-site study.

Plan
On-site research involves significant planning ahead for smooth execution. Location, recruiting, schedule, and incentives must be nailed down to ensure success.

Location. Together with your client, choose locations that best address study objectives. In addition to market selection, think through desired channels, retailers, store formats, and specific store areas or aisles. Consider regional differences or other factors that might affect the purchase environment, and
leave the store. If you have prior permission to be in store, then secure documentation showing authorization and store-level knowledge. In either case, map out interview flow to minimize disruption to shoppers and employees.

In advance of fielding, visit the exact store(s), if possible, during the time when the study will take place to get a feel for layout, traffic, store activities, background noise, and anything that could affect the interview.

Recruiting. Respondents can be recruited in advance or on site (via intercepts). When respondents must meet specific criteria, hire a trusted partner with experience recruiting to non-traditional sites; finding the right respondents and clearly communicating logistics to respondents is critical. For pre-recruited studies, develop a plan for no-shows to ensure the desired sample size. Recruiting floaters or back-ups are both good options, depending on the schedule and on-site location. Floaters can be recruited to be “on call” during interview slots or scheduled for specific time slots, such as end-the-day.

Intercept recruiting offers a cost-efficient approach to catching “real” consumers in the moment. For example, during a study to understand how consumers make decisions in a food court, intercepting visitors who were eating there was a successful approach. Have your business card on hand to show legitimacy and set clear expectations about the time commitment, incentive, and process, as respondents may not be familiar with qualitative research. Flashing the cash also helps motivate participation! Intercept recruiting typically requires that you have prior location permission.

Schedule. A critical part of the planning process is designing the schedule. Set up interviews or groups at times that reflect typical purchase patterns and normal store operations. For instance, interviews for a bakery study were scheduled only in the morning to best reflect the peak purchase time for fresh products. Also, schedule breaks throughout the day to relieve sore feet!

If pre-recruiting respondents, then spend time with your recruiting partner to fully explain the process, locations,
Prepare for the Unknown, Plan for Success CONTINUED

In-restaurant focus group

meeting points and back-up plans. Select one clear meeting point to avoid searching for your “lost” respondent! Assign a recruiter contact when in field for emergencies. A few other hints: consider making confirmation calls yourself, as this helps establish early rapport with your respondent prior to meeting on site. Also, include a photo or description of yourself with pre-interview instructions to make yourself recognizable and the interaction more personable up-front. Show rates greatly improve when respondents feel as though they already know you.

Incentives. Incentives are especially important to in-store respondents who may be skeptical about receiving payment outside of a research facility. Options for incentives include cash, pre-paid debit or gift cards, and another form of payment tied to the tested category. Cash is highly valued and appreciated, yet consider the personal safety and risk involved. Limit the amount of cash you carry at one time, and assign one person (or yourself) to be the “keeper” of incentives; fewer hands handling cash reduces risk of loss.

Because unexpected events happen, carry additional incentives. In one study, a canceled respondent showed up on site and was furious to hear he might not get paid. In this case, paying the respondent avoided an awkward scene. Keep two or three extra payments available and include this amount in your original budget. Another best practice: create a record of payment by asking respondents to sign confirmation of payment receipts.

Prepare

With your research plan solidly in place, prepare for fielding on-site: what to bring, what to wear, and how to manage others. Here are tips to make sure you are prepared to capture insights and meet objectives while orchestrating many moving parts.

Capturing Insights. There are two basic ways to record what you observe and hear on-site: handwritten notes and audio/video recording. First, consider the client deliverable. Does your report need respondent footage to support insights? If so, then consider the video quality needed. For most studies, using a smartphone video camera provides an unobtrusive device that delivers sufficiently sharp video quality. For studies requiring high-quality audio/video reporting, consider investing in a minicam with microphone or hiring a professional videographer.

Traditional pen and paper is always reliable for taking notes, assuming you maintain good eye contact with respondents while moderating. A “catch-all” approach for taking detailed notes and capturing audio is to use the Livescribe pen, which allows you to write down brief notes that link directly to the audio recording captured when the pen hits the paper. The quality and range is strong even in noisy environments.

Whatever mode you use for capturing insights, be sure to set your client’s expectations regarding audio/video quality. Clarify how the report will be used and consider showing an example of a video clip beforehand to ensure your report is credible and powerful when presented to the client team.

Moderator Presence. Consider the amount of work required and support needed on-site. Can you, as moderator, handle all logistics solo or do you need assistance? This often depends on methodology. If conducting individual, in-depth interviews in a store unaware of your research (e.g., your client’s competitor), then going solo is likely sufficient.

Conducting interviews in both urban and suburban pet stores helped a client discover important differences between pet owners in these areas regarding pet food selection, specifically size of package and ability to transport and store it.
and certainly less obvious. If conducting in-store groups with store permission, then hiring assistants may be necessary to execute multiple tasks happening simultaneously. For example, an in-restaurant taste test with on-site recruiting requires multiple hands on deck: intercepting customers, running food, interviewing, paying incentives, etc.

No matter how large the research team on-site, wear comfortable clothing, especially shoes! Dress professionally and “neutrally” to blend in with customers; in other words, do not stand out based on your apparel. Consider wearing clothing with ample pockets for carrying a smart phone/camera, extra pens, and other paperwork.

**Managing Others.** Think about how to manage others on-site including clients, store employees, and other shoppers. Unlike a traditional facility, multiple clients are not able to observe on-site research in progress, at least not easily. The best option is to invite a member of the client team to assist you (e.g., taking notes or holding the camera). Caveat: if your client does not “look” objective to the research, then do not invite him/her. For example, an older male client tagging along at a young women’s apparel store shop-along may affect respondent feedback.

Be aware of the presence of store employees and other store customers. If you are conducting research at your client’s store with prior permission, then communicate the research plan (e.g., purpose, schedule, location) with the store manager beforehand or immediately upon arrival.

Other customers in the store may notice the research in progress. Avoid disrupting a customer’s shopping experience by simply stepping aside or designating a “research area” with signage (for example, place a “reserved” table tent on a table designated for interviews). Be prepared to answer questions from curious shoppers. If respondents were recruited from an opt-in client database, then consider referring customers to your client’s loyalty program enrollment. This can be a nice value-add to the study!

**Predict**

Even with good planning and preparation, expect the unexpected to happen during your on-site research. Examples: you are asked to leave a store where you do not have prior permission, a busload of customers fills the store to capacity, or the music is louder than you expected. Remain calm and improvise! As long as you keep research objectives in mind and capture needed insights, then you are at liberty to go “off script,” especially as there is no back-room audience following the script.

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**HOT TIPS for Successful On-Site Research**

**Plan**
- Select site that represents brand and is feasible for research
- Visit exact site prior to fielding to get lay of land
- Select partner with experience recruiting to off-facility locations
- Over-recruit respondents and intercept customers to replace no-shows
- Communicate exact in-store meeting spot to respondents
- Bring extra incentives to cover any add-ons
- Assign one person to manage incentives; pre-paid gift cards are safer to carry

**Prepare**
- Use a smart phone to capture video unobtrusively
- Use a Livescribe™ pen to take notes
- Set client’s expectations regarding audio/visual quality and parameters
- Consider amount of help you need on site vs. the need to be solo/incognito
- Wear comfortable clothing/shoes that don’t stand out
- Invite your client to “observe” by assisting you; make sure he or she “looks the part”
- Conduct research away from other customers
- Be prepared to respond to curious customers

**Predict**
- Expect the unexpected
- Improvise
- Stay calm
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Our experience is in recruiting patients (and their caregivers) with rare diseases such as Polycythemia Vera, Myasthenia Gravis, Eosinophilic Esophagitis, etc. You get the idea: if you’ve never heard of it, or can’t pronounce it, it is likely hard to recruit. We’d like to share some tips to help your difficult recruiting go more smoothly.

There are several things that you, as a moderator, should keep in mind:

Know the Incidence
It is best to know what you are getting into from the beginning. Even when you know it will be a difficult recruit, try to determine what the incidence is within the target group. We often get calls for help from recruiters who took on a project, assuming it would be somewhat routine, only to discover the respondents are not to be found! We often are asked to get patients of a rare disease (difficult enough), who only use a specific drug (sometimes impossible!). Your client may have a good idea of the incidence, and they may also be able to tell you how their research agencies have found respondents in the past. However, I’ve often heard clients say that certain recruits were done in the past “with no problem,” only to learn that wasn’t the case at all. Selective memory? Possibly.

Either way, to save yourself the stress, find out the incidence before you launch the study.

Give Yourself Time
Recruiting a hard-to-find group from scratch takes time. Working with an advocacy group and finding appropriate venues to meet the respondents can take weeks, months, or even years. Conversely, when recruiting from a panel, timing is not an issue. If your recruiter has taken the time to build a panel, a recruit often can be done within days or weeks. If you don’t have time, seek a recruiter who has done the work and has a panel ready to tap.
with rare patients that a higher honorarium is needed than with other respondents. We recommend paying by check, as some respondents need the money for rent or co-pays, and gift cards won’t help with that. Also, because they need to provide a physical address (not just an email account where you can get 100 addresses in 10 minutes), it reduces the chance of them being fraudulent.

Of course, you’ll likely need to work with a recruiter to find these difficult-to-find respondents. Here are some tips for selecting and partnering with the right recruiter:

Go Get Them!
Your recruiter needs to go to the respondents, not wait for respondents to come to them. We go to patient events such as walks, conferences, and educational symposia. We meet them and explain the research. So when we need them, they know us, and they respond. Same with other methods — if possible “go” to them for the research, via phone, online, or going to their homes. It is hard enough to locate these respondents, and many (especially ill patients) are not keen to drive downtown, park, etc., but the phone is their friend. Flexibility with methodology enables you to recruit from all over the country, not just in a few select metro areas.

Never Stop Recruiting
Ask if your recruiter is constantly recruiting for their special panels (even if we don’t have a current need, we reach out to patient support groups and attend walks). Your recruiter should keep their eyes and ears open for organizations that recruit in your target areas (e.g., health, education, food, cosmetics). Check recruiter websites to see what new areas they are focusing on now. You never know when your preferred recruiter may expand to a new target market.

Respondents Know Other Respondents
Determine if your recruiter asks for respondent referrals. This can be a great source of additional respondents. Try to budget in a bonus for those who refer similar respondents to you. Rare patients know each other; for example, they are in support groups together or on social media sites where they can spread the word about your study. On the other hand, we’ve found professional referrals to be less successful. Getting physicians to refer patients or patients to refer their physicians doesn’t often pan out. And professionals want more compensation to refer than patients do!

Advocacy Groups Can Help — or not
Ask if your recruiter is involved with special interest groups. We work with many patient advocacy groups. Many are a delight to work with — we sponsor their events or provide a donation, and they can reach out to their members. But beware, some won’t help. They may be particularly protective of their members, or they may conduct their own research and don’t like to deal with outsiders. It can’t hurt to ask, though!

Phone or Online Recruiting — or Both?
Ask how your recruiter will approach screening. Many of us old-school researchers naturally assume the recruit will be via phone, and that’s how we write screeners. However, we find there are great advantages to programming the screener and screening online. We can reach our panelists instantly, for example, and schedule them at the same time. And there can be less bias. A recent patient and physician study presented at a Pharmaceutical Market Research Group (PMRG) conference found that over half of respondents indicated that recruiters were leading them. This is nearly impossible online.

Finding the right respondents for your research is crucial. Using these tips will start you off in the right direction. We hope you find that the “impossible” may be possible! Your client will be thrilled (even if they don’t show it), and you won’t have those sleepless nights worrying that you won’t find any respondents.

Trust, but Verify
If you find a firm that has a panel of the respondents you need, you may be in luck. Make sure to ask them how they recruit (you want authentic respondents, not someone who has clicked every box to be invited to research), how they validate respondents, what specific experience they have with your target group, how they compensate respondents, how long the recruit will take, and if they subcontract (and if so, they should be transparent about it).

Pay to Play
Don’t try to save a few bucks on the honoraria and then try to raise it if the recruit is slow. Once someone is passed by, there is a good chance you won’t sway them when you come back with a higher honorarium. In rare-patient groups we find that the respondents are connected; they will find out that someone else got paid more than they did. Pay them all the same amount for the same study. We find
In order to remain relevant, companies are seeking to “future fit” their product offerings through meaningful innovation, and they are accessing this type of thinking through qualitative research.

Prerequisites for Success

Today, consumers do things and expect things and leverage things as the norm that simply weren’t possible just a few years ago. The important thing about this is the challenge it creates for businesses to align what they do and how they do it with these new consumer realities.

In 2007, Apple launched the iPhone and kick-started what many refer to as the second wave of digital. Since then, the coming together of smartphones and tablets, mobile Internet, social media and fast, in-home connectivity has been game-changing. Digital’s second wave has fundamentally changed the way people engage with organisations and has re-framed the relationship consumers have with brands.

The deep, underlying consumer truths have not changed. But in a multi-modal, multi-platform world, the ability to cut through the digital noise...
An automotive company came to us to explore what getting “future fit” might mean, but they weren’t really thinking electric vehicles, driverless vehicles, or necessarily how the Internet of Things might impact vehicle production or ways of servicing vehicles. Instead, this manufacturer was watching a different trend: how the second wave of digital was going to impact car ownership, full stop.

The company had started to consider how consumers will have different choices about the notion of car ownership. In fact, it could already see significant change in action. The slow but steady growth of new ways of accessing a car pointed towards a potential world where people may decide to own fewer cars or not own one at all.

In London, where I live, it’s getting more and more difficult to own a car. Some boroughs are only granting planning permission to certain developments by refusing resident access to local parking permits. Essentially, they’re saying: to live here you must be able to afford to pay for daily parking or else don’t own a car.

In parallel, the growth of digitally-enabled services (such as ride-sharing like Uber and car-sharing like Zipcar and car2go) suggests that much is changing in the way we organise and go about getting about. When a consumer can grab their phone and hire a car at the top of their street, pay for it by the hour and only use it when they need to without the hassle and cost of ownership, it becomes a very interesting and sensible choice to not own a car at all.

So, it is a perfectly viable question to ask: what does the future of car ownership — or, more to the point, car access — look like? The electric car is lovely, and a driverless car may appeal to a good number of people, but neither is much good for those who decide that there’s not much point in owning a car at all. And that may be less about attitude and more about new practicalities.

What made the project really interesting for us was that it was not just about coming up with a new offer, a new product, a new proposition, or necessarily innovating something in and of itself. What it was really about was bringing the future forward and making it vivid and believable to a senior management solely focused on the production of lumps of metal, blind to a world where potentially far fewer cars are owned. It also just so happened that it was a record year for car sales.

For senior managers in a car company, their world is cars. A car is part of their compensation package and will likely include a top-of-the-range model. They more than likely drive to work every day, and few car companies are located in inner cities. They probably have a reserved parking space to look forward to when they get to work, near the front door of the building. And forget servicing: when the car’s been driven for six months or so, it’s time for a new one. Can they imagine how hard it is for someone living in an inner city where parking is a nightmare, the traffic is terrible, congestion tolls may be in place, and it’s a pain to get to a service centre?

Innovating for Needs

Innovation is not about asking people’s opinion or testing your idea with them, important though that can sometimes be. What’s important when seeking to innovate is really understanding what people are doing now, understanding what matters to them, and — for where they face difficulties or adversities — getting close to any workarounds they have invented for themselves. The “problem” probably only really matters if we’re intending to do something about it. Finding people’s work-
Future Fit: There Is White Space Out There CONTINUED

around tells you a lot about where there may be opportunity for innovation.

For anyone familiar with Robert Fitzpatrick's book The Mom Test, this will likely chime. Robert Fitzpatrick is an entrepreneur and has had his fair share of failure, as any good entrepreneur will have had. Through the process of failing and having the odd success, he has learned that one of the worst things you can do is ask people's opinion about your ideas. He argues that everyone is lying to you, at least a little. But the key to what he argues is that it's not your audience's responsibility to tell you the truth, it's your responsibility to find it. Fitzpatrick argues that it is much better to observe, understand and imagine where your idea may fit into somebody's life because it's something they need, rather than ask them to tell you what they think of your idea or how it may fit into their life.

Real-World Insights

Through this project, we wanted to shift the perspective from looking at the world through the lens of the car to looking at the world through a "lens of change." Very often in innovation work, until you shift the lens you're looking through, it's very difficult to see anything new.

I'm a great believer that you can't help a client innovate if you don't put them on the journey themselves. You can come back with great ideas, but they won't be as believable or be seen in the same light if the client hasn't realized the need for the idea themselves.

We asked our automobile client to complete a number of tasks to meet the problem head-on. One of the tasks was to hang out in car parks, asking people if they would be willing to share their car with him. You can imagine the response from most people carrying the shopping bags, clutching a small child, fighting through the rain, then getting to their car to find a strange man asking them if they would be willing to share their car with him.

The insight revealed was why they didn't want to share their car, and it helped the client understand the barriers and from that to springboard to potential solutions. For example, if the client company wanted to consider launching a sharing scheme it would need to think through who would want to share with whom.

The learning from the car park exercise repeated in different scenarios. We discovered that people weren't unwilling to share their cars, just not with someone they knew nothing about. For example, one doctor suggested he would be willing to share his car with another doctor because he had a sense that they share similar ethics. He felt that car sharing with someone more like himself would help de-risk the idea.

Some people said they would be more willing to share with someone when the sharing was reciprocal. Someone suggested it would be great to borrow a neighbor's sports car in exchange for their 4x4 as a way to enjoy or get utility out of both types of car without having to own both.

To achieve breakthroughs, it proved important to get insight from real-world interactions and uncomfortable conversations.

Beyond the Comfort Zone

There's something about the current format of much research that can be too comfortable to generate genuine insight. One of the things that can unlock ideas is bringing people together who have opposing views and letting them fight a topic out. We also need to get beyond the notion of the researcher as always a neutral agent. Yes, researchers conduct a Q&A or complete a long discussion guide, but white space researchers are also an active part of the conversation and allowed bring their experiences and their knowledge into the conversation. There is something fantastically important here in that insight is not something that exists "out there," waiting to be "found;" rather, it's something that happens — can only happen — in people's heads.

Setting and mode become important. We often use dinners as a fantastic way of engaging with consumers, not just because of the different level of social interaction such an event creates but also the camaraderie achieved over a dinner gets you to that heightened truth all of us as qualitative researchers want to get to.

In getting your idea or innovation ready for market, sometimes the most important audience to convince is an internal one. A critical internal audience could either green- or red-light further investment. Bringing it all together in a way that is able to convince senior management to move from being intrigued by a potential new world to backing it with money is key.

Through film depicting global consumer realities, senior managers of the automotive firm were able to see that customers and prospects — people who were buying their cars or cars like them — were often doing things today that the executives simply didn't think they were doing. The big question that fired them up was: How can we make sure that our brand has a role to play in this new, emerging world? And, how could new models of access, ownership and added value services help create and retain customers?

So in answer to the challenge “there is white space out there,” I think this is a story about innovation but also about how, more than ever, qualitative research is fundamental to our understanding of how the world is today, where it's going, and the factors influencing business decisions.

The fantastic thing about qualitative research is that it allows us to get behind the surface of things, behind the numbers, to peek inside people's heads and answer the "why?" questions. Faced with the opportunities and challenges that this current wave of digital creates and concurrent growing mountains of data, how we engage with consumers and the insights we glean become unique and fantastic stimulus for decision-makers, helping them to see what people are like and what they may need.
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It’s late at night. You have a deadline, an early morning flight to catch, and that contract to sign. You are tired, and you hate reading contracts. Do you bother to read it? Does it include language about “industry best practices for data security and privacy?” A gnarly technology audit questionnaire? Yes, you need to read that contract. You may be agreeing to more than you realize, with serious implications if you (or your subcontractors) don’t comply with the provisions.

New laws around data security and privacy are changing client contracts. These days, there’s a good chance your client contracts, especially from big companies with in-house attorneys, include language about data security and privacy in compliance with state, federal, and international laws. They may also require that every vendor you bring on to the project complies with your data security and privacy policies and procedures. Did you know that if your vendors don’t agree to all of this...
Do You Know what You Agreed to? CONTINUED

Gone are the days of emailing recruiting updates and client sample, of using a private Facebook group as a cheap workaround for an online community, and of onboarding a new research facility with a simple contract or just a virtual handshake.

and there’s a breach, you could be legally (and financially) responsible? Do you realize these laws apply not just to health information but also to basic information routinely included in your recruiting profiles?

Why are things changing to make life harder — and more expensive — for independent researchers? Quite simply, the laws have changed. In the ’90s, the U.S. Congress started passing laws to help protect consumer privacy, security, and health information. The E.U. has also been changing laws to protect consumers. Even though Congress started passing those laws in the ’90s, it has taken time for compliance to fall into place. This is why it may just now be affecting the contracts that land in your inbox.

Per Grant Littman, Senior Manager, Digital Experience at Southern California Edison, “Companies and their vendors have always been charged to be good stewards of their customers’ data. What’s changed, due to ongoing legal and regulatory developments, is the need for companies to revisit long-standing business processes, technology choices, and contractual relationships to ensure that expectations are clearly defined as to how data can be used and is expected to be protected by all parties who handle customer information.”

Most clients handle Personally Identifiable Information (PII), which includes data such as customer names, addresses, and emails. Many handle Personal Health Information (PHI), such as diagnosis data, protected by the Health Information Portability and Accountability Act (HIPAA). Our client companies must comply with those new state, federal and international laws to protect both PII and PHI. If you need access to PII or PHI (such as for recruiting), then you as well as your subcontractors are required to comply with those same laws.

Many client companies are establishing compliance programs to protect their data and to comply with the new laws. These laws require them to pass on privacy and security requirements to their service providers who access PII or other protected data. Some are limiting their own liability by passing legal and insurance requirements down the chain to their vendors, including independent researchers. If they don’t, and an independent researcher (or a subcontracting vendor) makes a mistake, the client company is liable. This is called the “chain of compliance” and “chain of liability.”

If you are handling PII and/or PHI, you are legally required to adhere to those laws even if your clients aren’t demanding it. Your clients may require you to put into place a Written Information Security Plan (WISP) and/or Information Security Procedures (ISP). Even if your clients aren’t requesting this, it’s a good idea to start putting things into place because you too need to adhere to the new laws.

So what does this mean for independent researchers? Compliance with these privacy laws has real-world implications for how we work. Gone are the days of emailing recruiting updates and client sample, of using a private Facebook group as a cheap workaround for an online community, and of onboarding a new research facility with a simple contract or just a virtual handshake.

Littman adds, “It’s a wake-up call to the reality of how data privacy laws will change the way work is performed. Getting educated and embracing data privacy is the best approach where customer data is an indispensable part of the work. Researchers have to comply with these laws and take measures to protect our customer data.”

What do independent researchers need to do?

You May Need a WISP

A WISP (Written Information Security Plan) is a legal document written by an attorney, ideally one who specializes in this new area of law. A WISP clarifies what data privacy laws apply to your business data (PHI, financial data, etc.) and explains in detail your company’s procedures and technical safeguards to protect confidential information and sensitive data based on the state, federal and international laws that govern your business. For example, my five-page WISP defines the type of confidential information I handle (PII, not PHI), outlines who has access to that personally identifiable info, stipulates that I revisit my data security and privacy policy
and procedures at least annually, names our data security coordinator, etc.

Beware of the generic security plans you can borrow from a friend or find online. Your WISP should be customized based on the nature of your work and the laws that apply to your business. WISPs will vary from researcher to researcher depending on the kind of data handled, how the data is used, and how it is shared. It’s important that your WISP reflects your actual practices. If it refers to the wrong laws or mentions practices that you do not do or cannot do, you may be increasing your liability. You don’t want to claim to do something and not actually do it, so your WISP needs to include only the laws you will actually comply with and only practices you will actually use.

Your WISP isn’t just for you. Everyone who works on your projects needs to comply. I reference my WISP in my contracts and send copies to my vendors and clients.

An attorney who specializes in data law should be able to create a custom WISP for your business. It’s an expense none of us wants to incur, but it’s probably necessary in order to comply with client contracts. I raised my fees to cover the legal costs associated with compliance, and none of my clients were surprised to hear that compliance with their contracts comes at a price. In fact, my large corporate clients appreciate my understanding of the legal environment and how it applies to service providers like researchers.

You May Need an IS Policy
An Information Security Plan (ISP) is the technical part of the data security compliance program and is most often developed by an Information Security (IS) consultant. It, too, is tailored to how you work. While the WISP is more general and focuses more on the legal side of things, the ISP focuses on the technical side of things. It outlines best practices about file sharing, cloud storage requirements, backups, email, encryption standards, password requirements, firewalls, virus and malware protection, sharing of devices, employee training, etc.

As with the WISP, beware of the generic ISP. Reasonable IS procedures vary based on the size of the business and the types of data handled. If you handle PHI, run a large agency or work internationally, your ISP will be different than mine. Larger companies are held to higher standards than small shops. Best practices for information security are always changing, so this is a document you’ll need to regularly revisit with your IS consultant. My WISP stipulates that I’ll revisit IS procedures at least annually.

Again, your ISP isn’t just for you. Everyone who works on your projects needs to comply with it. I reference my ISP in my contracts and send copies to my vendors and clients. I submit my ISP in lieu of responding to multi-page technology audit questionnaires.

An IS consultant (who is different than the IT consultant who fixes your computer) should be able to create an ISP. Ask your data law attorney for a referral or ask your IT consultant about their knowledge of and experience with WISPs and ISPs. If they don’t know what that means or can’t tell you about their own experience creating IS policies, keep looking. Ideally find someone who is familiar with research. If not, explain how you work with subcontractors (videographers, transcriptionists, recruiters, etc.) so they understand how your data are shared.

If you Google “IS consultant,” you will find some large firms that do it all — both the legal and the technical side of compliance — but it can be hard to find an IS consultant who specializes in small businesses. According to Paul Riola, VP of Lark Information Technology, “It is very difficult to find IT consultation that specializes in IS policy work and tailors solutions to smaller businesses. There are many IT ‘security’ firms that do full-blown audit, risk assessment and remediation, but they are catering to large enterprise organizations.”

If you find someone good to work with, please share that information with your colleagues and on the QRCA Forum.

You May Need to Revisit Your Subcontractor Agreements
Once you put the WISP and ISP in place, you’ll need to update your subcontractor contracts. If there are discrepancies between the contracts you sign for your clients and the contracts you send your vendors, you may be liable if something goes wrong.

If you need access to Personally Identifiable Information or Personal Health Information (such as for recruiting), then you as well as your subcontractors are required to comply with these new laws.
Everyone who touches your project needs to sign on to those terms: facility owners, online platform providers, recruiters, moderators, report writers, note takers, transcriptionists, videographers, etc. Revisit your contracts to ensure your subcontractors and vendors agree to terms similar to what you agree to.

It’s time consuming and can be expensive to put your vendors under contract, so be sure you leave time at the beginning of new projects to find vendors who are willing and able to comply. If you don’t, you may be taking on liability for your entire team of subcontractors.

You Might Want to Get Cyber Insurance / Data Breach Insurance

This insurance is relatively new and varies widely in quality and cost. It’s probably not part of your professional liability insurance, so ask your insurance agent. Some consultants believe that if they get data breach insurance they are covered no matter what happens, but it’s not that simple. For example, if there’s a breach and you weren’t using a secure password in accordance with your ISP, your insurance company may not cover the claim.

Get those data security and privacy ducks in a row and you can sleep soundly knowing that a data breach isn’t likely to happen on your watch. If it does, you’ll be in a better position to reduce risks and liability for you and your clients. Coming into compliance takes time, attention to detail, and unfortunately, money, but it’s important and it’s worth it. It has become a cost of doing business.

The author wishes to thank Kari Kelly, Partner, Centric Legal Services, and Paul Riola, COO/Executive VP, Lark Information Technology, for their valuable contributions to this article.

Here Are some Best Practices You Should Adopt Immediately as Part of Your Data Security Plan:

- **Move onto the Cloud.** The cloud is more secure than your hard drive. Use a certified third-party cloud provider with qualified encryption, such as Google Drive, Box, or Dropbox. Ask your data law attorney and IS consultant if you need a BAA (Business Associates Agreement) with your cloud provider, which means they take on some of the liability of your data security. If you are dealing with PHI covered by HIPAA, then you need one.

- **Be Careful with “Physical” Storage.** Avoid putting any protected information on hard drives, thumb drives, etc. Instead, share and backup via the cloud.

- **Don’t Email Anything that Includes Protected Information.** Never email samples or a recruiting profile sheet that includes protected information (contact information, medical conditions, etc.). Instead, share via the cloud.

- **Use Strong Passwords on all Devices.** If you have access to protected information via your phone (cloud, email, etc.), you need a strong password. Login with biometrics (fingerprint scans) when you can. Your passwords should be long, complex and regularly updated. Use a unique password for every site. A password manager such as LastPass makes it easier to manage multiple long and complex passwords. Aim for a password manager that requires SSL, uses 256-bit encryption, and stores your passwords in the cloud (not on your hard drive or in your browser). Clear your cache of passwords.

- **Choose Good Passwords.**
  Password length is just as important as complexity. One best practice is to string together four nonsensical words plus at least one capital letter, number, and character. They should not be related to you in any way. For example, ‘Guacamole!-RollercoasterCarpet?Storm42’ is much more secure than ‘A&t924*7qst!’. It takes much longer for a machine to guess the longer series of four words. Plus, it can be easier to remember.

- **Encrypt all of Your Devices.** If you can’t encrypt it, don’t use it.

- **Don’t Share your Devices.** The phone you use for business should not be used by anyone other than you. If, like your computer, your mobile devices give you access to your email and/or Google Drive/Box, then you need to protect them like your computer with biometrics, a secure password, and no sharing.

Want more information?
International Association of Privacy Professionals: qrca.org/VIEWS-022.
Check your state Attorney General’s website.
Kamala Harris in California is at the forefront of progressive data privacy work: qrca.org/VIEWS-023.
Paul Riola suggests this article: qrca.org/VIEWS-024.
QRCA continues to conduct and record interviews with thought leaders in the qualitative research industry. These podcasts shed light on subjects of great interest to those whose work involves qualitative research.

In the latest episode, QRCA VIEWS Podcast Editor Mike Carlon interviews Steve August, Chief Marketing Officer of FocusVision, about the history and future of qualitative research. A true visionary, Steve is a digital and mobile qualitative research pioneer. In 2007 he created Revelation, the trailblazing online platform for mobile diaries, insight communities and bulletin boards. Revelation was acquired by FocusVision in 2014.

Listen up as Mike and Steve talk about the history of online qualitative research, the rise of mobile as a qualitative research vehicle, and the future of hybrid online/face-to-face qualitative research.
When I first saw the title of this book, I immediately assumed a redux of The Hidden Persuaders, Vance Packard’s iconic and explosive 1957 account of how the motivational researchers at ad agencies figured out ways to manipulate consumers. Instead, Dr. Robert Cialdini’s book, Pre-Suasion: A Revolutionary Way to Influence and Persuade, is very different.

Cialdini is the highly respected social psychologist whose 1984 New York Times bestselling book, Influence, sold more than 3 million copies. His new work builds on that foundation with fascinating observations on the latest news from the behavioral sciences. His overarching premise in Pre-Suasion is that it is feasible to boost effectiveness of a communication in the last instant before it is sent. In this sense, timing is everything.

The first section of his book describes the many “privileged moments” that allow such “frontloading of attention.” Cialdini contends that a person’s choice in any given situation is not necessarily the most accurate or even the most useful. Instead, it is the choice that has been “elevated in attention” right at the moment of decision. This timing of attention has ramifications for a host of our techniques and practices in enhancing qualitative research, especially avoiding biased questioning and the “blinker perspective” these create. It also has deep marketing and advertising implications for our clients that may or may not always be comfortable for us. Cialdini gives numerous examples of what attracts and magnetizes attention as both cautions and tools.

The second section of Cialdini’s book informs and documents what he calls “the primacy of associations” and “the geography of influence” in the sense that “I link, therefore I am.” Cialdini explains that different environments can be more pre-suasive than others in pushing behavior toward desired ends. Reading this section, I began to have more confidence that there are higher-order benefits as well as welcome protections against being unduly swayed.

My ethical concerns were mitigated a bit by the third part of this book, Best Practices: The Optimization of Pre-Suasion. In this section, Cialdini steps back a bit to his earlier seminal work, Influence, to elaborate on how and why six universal principles of social influence — Reciprocation, Liking, Social Proof, Authority, Scarcity, and Consistency — work to move people toward “assent” of choice. These stretch far beyond mere platitudes in the many research and real-world examples the author provides.

Cialdini also emphasizes that unity and acting together boost our ability to influence and persuade. It seems that when people act together, they not only see themselves as more alike but also feel more positively about each other later. He cites two compelling studies of “synchrony” and “coherence.” More supportive examples follow, including connections with Nobel prize winner Daniel Kahneman’s distinctions between System 1 and System 2 thinking as well as the relationship between “cocreation” and “asking for advice.”

If you are as intrigued as I am by this litany of claims, strategies, research and conclusions, but still feeling squeamish about any elements of manipulation, the author finishes the book with a long section on ethical use, along with extensive references and end notes for his data and arguments. As he concludes, “In each case, the made moment is pre-suasive. Whether we are wary of the underlying process, attracted to its potential, or both, we’d be right to acknowledge its considerable power and wise to understand its inner workings.” Read this book and you most certainly will be stimulated, influenced and even persuaded.
I thought about attempting to use data visualization for at least part of this book review, but even though I didn’t, do not take that as a slight against Scott Berinato’s insightful and visual book *Good Charts: The HBR Guide to Making Smarter, More Persuasive Data Visualizations*.

In the world of writing and preparing reports and presentations, the phrase “a picture is worth a thousand words” has evolved to increasingly relying on presenting data in a visual context rather than having information explained by just words. While “data” is generally seen as synonymous with quantifiable data, data visualization, or dataviz, it also has a growing role in qualitative research reporting where information is directional and should not be quantified.

In 1983, Edward Tufte pioneered the art of data visualization with his classic *The Visual Display of Quantitative Information*, which focuses on guidelines for graphic design execution of the elements that go into creating impactful dataviz. While this tome was last updated in 2001, Tufte’s graphic guidelines are still relevant today.

Since 2001, the growing availability of more sophisticated graphic software has made the actual creation of data visualization much easier. However, the questions “Where do I start?” and “What information should I use?” remain as challenges that still flummox many people.

Scott Berinato’s *Good Charts: The HBR Guide to Making Smarter, More Persuasive Data Visualizations* helps address these challenges. Berinato builds on Tufte’s work in providing a very good review of Tufte’s and others’ data visualization design execution guidelines.

But what sets Berinato’s book apart from any other how-to data visualization manual is that Berinato adds the dimension of “contextual awareness” as a key element in figuring out how to start and think about the process. Berinato highlights and provides solutions to the problems that many people face when trying to decide how to visualize information.

Berinato’s contextual awareness mantra is that you can’t take a one-size-fits-all or paint-by-numbers approach when using data visualization. You also need to incorporate contextual awareness of who the prospective audience is and realize that different audiences might require different data visualization. In other words, you need to marry design skills with a visual mindset. He also shows how common it is to not match the right data to the right audience. Berinato is adept at providing multiple helpful examples of how trying to make the same point may require different information when talking to different audiences and what the reader can do to avoid common pitfalls. To help drive home this point, in chapter two he provides an excellent overview and context of how people absorb and process the data visualization information. In addition, Berinato takes the reader through the difference between exploratory and explanatory visualization, which require different graphic approaches.

I found the organization of the book — breaking out into four key sections: Understand, Create, Refine, Present — to be a good way to build his argument and to be able to reference specific information at a later date. Having a recap of key points at the end of each chapter is a nice bonus, especially with the amount of information covered in each chapter.

For the novice or someone who is unsure of their data visualization skills, a thorough reading of *Good Charts* would be very helpful in building those skills as well as getting more comfortable with data visualization. For those who have a higher mastery of data visualization, *Good Charts* would serve as very good refresher while reinforcing the need to match the right data to the correct audience. *Good Charts* also plays the role of a helpful data visualization manual to turn to when you are starting a data visualization project or stuck on a specific data visualization problem.
Digital Context 2.0: Seven Lessons in Business Strategy, Consumer Behavior and the Internet of Things

David W. Norton, Ph.D., Gifted Press, 2015

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Digital Context 2.0: Seven Lessons in Business Strategy, Consumer Behavior and the Internet of Things helped me better understand how consumer behavior is changing within the Digital Context and the Internet of Things (IoT). It is full of forward thinking and BIG ideas that pushed me out of my comfort zone and has left me constantly asking “what if?” with each new marketing challenge I encounter.

The author, David W. Norton, spent two years using co-creation, ethnography and quantitative research to explore how consumer behavior is changing in the digital world and what marketing and business strategies should be doing to address these changes. Part of his research process involved gathering leading marketing strategists from a range of industries to collaborate and discuss how to more fully understand consumer behavior within the Digital Context and the IoT. This gathering of strategists was under the umbrella of the Digital Consumer Collaborative (DCC), and Digital Context 2.0 provides a detailed discussion of seven of the key findings.

While some of these lessons might be obvious, Norton provides further relevant insight for each and does a very good job of articulating and explaining how these changes are impacting consumer behavior and what marketers and strategists should be doing to integrate these changing consumer attitudes and behaviors. Some of the lessons that resonated with me the most are:

“Cocoon of Data.” Norton discusses how the “cocoon of data” around consumers’ lives has transformed consumer expectations so that they now expect multiple functionality from items that were previously singularly focused. For example, an IoT watch no longer just tells time, it is a tool to track our sleep, movement, and water consumption. This idea of “cocoon of data” has impacted how I conduct research, and I’m now looking for ways to reveal how my focus group and in-depth interview subject can help build that cocoon.

What mode are you in? Instead of looking at consumers based on their demographics or psychographic data, Norton argues that customer segmentation and value proposition design can be based on the “mode” that a consumer is in — that is, the mindset and pattern of behavior that a consumer gets into to be most effective or to enjoy an experience. A consumer’s decision-making process is driven more by the “whys” and “hows” than the “whos.” Think of how consumers approach tasks like selecting a holiday gift for a family member or planning a vacation, and you will see that there are similarities despite differences in demographics.

Don’t focus on loyalty; focus on positive engagement. Consumers can be overwhelmed with too much activity, resulting in diminished “health, personal well-being, and family life,” so it’s important that engagements improve the comfort of the customer by delivering happiness engagement that is transformative, altruistic, perceptive or utilitarian.

At the end of the book, Norton shares a fictional case study on P&G’s Swiffer cleaning product that offers a wonderful segue to ask questions about your organization and start preparing your own strategy to embrace the Digital Context.

Digital Context 2.0 is an easy read and perfect for your next flight. Norton presents concepts that I once found impossible to understand in a way that is easy to digest and apply to qualitative research. If you have found previous discussions around IoT confusing and ambiguous, this is a perfect book for you.
I picked up this book because of both the cover and the title. Raised lettering, specialized font and ribbon cover design evoke an old fashioned crafted look, and the words Revenge of Analog in the title imply that this book has an interesting story to tell about why digital is not always the answer. Seeing that the dedication has quotes from both Marshall McLuhan and The Big Lebowski further conveys that this book will be a fun and entertaining read. It is, with the added bonus of being insightful.

In The Revenge of Analog: Real Things and Why They Matter, David Sax attacks the mythology of the digital revolution, which implies that the future of innovation, improvement in efficiency, and new business ideas reside almost exclusively in the digital space. While recognizing digital's role, Sax makes a strong argument that consumer desire for tangible products, experiences and social interactions is fueling a growth and resurgence of products and industries in the non-digital space and explains why it is important for businesses to also focus on non-digital opportunities.

Each of his chapters focuses on a specific industry or product case study. But rather than just recounting how the business was built or how the business opportunity was identified, Sax brings the consumer experience of using and interacting with that product or industry to the forefront. He identifies how in these cases the analog versus the digital business model is better at delivering on the desired consumer experience as well as delivering a product experience that may not be available in the digital space.

Two interesting industry examples Sax takes the reader through are the gaming and vinyl record industries. Sax shows how negatives of the video game playing experience helped fuel the explosion of board and card game playing and created a “new” industry of board game cafés. In addition, he shares why a free online game became more successful when it was transitioned to a paid, non-digital, tangible game. In the music example, Sax explains that while the quality of the vinyl recording is much richer than digital recording, sound quality was only one of the components in the resurgence of vinyl records. He shares many examples of how owning a vinyl record creates a music experience that is different, and for many, preferable, to just owning a digital music file.

A specific new product example Sax presents is the ubiquitous Moleskine notebook, which, I was surprised to learn, was only launched in 1997. It is just one of those products that you feel has been around forever. Sax shares how the Moleskine founders identified the business opportunity and their vision and understanding that their Moleskine notebooks would help fuel a consumer experience and expression of one's self (Picasso and Hemingway also play a role). Sax contrasts that with the difficulty that the founders had in getting financing because the financiers didn't understand the value of the consumer experience and just saw an undifferentiated, old-fashioned paper product that they felt would be eclipsed by electronics.

But I felt Sax's strongest chapter and argument were embodied in Chapter 9 — The Revenge of Analog, in Digital — which focuses on the role that non-digital experiences play in many of Silicon Valley's companies. One example he gave was when Yelp tried to move its engineers from using physical whiteboards to digital screens. On the surface, it looked like they were interchangeable and that digital screens would just make things more efficient. The engineering department, however, disagreed. With digital screen technology, there were fewer interactive and collaborative efforts as people tended to work in isolation on their laptops. With whiteboards, engineers tended to gather to discuss things and were more likely to take risks and share ideas in a group setting than when they were working in front of a computer screen.

Sax's style is fast paced and easy to read, and The Revenge of Analog reminds us that the crucial consumer experience can't always be delivered through a digital platform or product.
SET 'EM UP!

Ever notice how the best connections happen when we're most at ease and having fun, like when we're hanging around a bar or relaxing in our own living rooms? Ever notice how so few bars and living rooms are equipped with state-of-the-art viewing & AV capabilities? Us too.

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