Top lessons from a weekend switch to virtual

Back in the good old days of early March, I was excited to be helping a new client in relaunching a niche beverage brand. We had focus groups planned to start on Monday, March 16 …foreboding music in background.

Then, Friday the 13 hit – and our plans were completely derailed. But, thanks to my collaborative clients, we were ready to launch online Monday morning: platform booked, participants rescheduled and discussion guide and stim reworked.

I’m relieved to report the online groups went off without a hitch with the clients getting the clear direction they needed. Here’s what helped:

- **Trusted partners:** Shout-outs go to both Schlesinger and FocusVision InterVu for being so proactive! Things would not gone nearly as smoothly without their expertise and support.

- **Taking advantage of the virtual tools (not available in person!)**
  - Pop-up text chats allowed us to capture individual (and uninfluenced) impressions before discussion.
  - Quick polls provide a quick read of preferences with the bonus of instant downloadable data for visually compelling charts.
  - Better ways to share stimulus: Virtual tools provide lots of flexibility to share visual ideas from different perspectives with just a click. And most platforms offer tools that allow participants to individually mark up visuals with detailed comments.

- **Avoiding the backroom chat:** Rather than getting distracted trying to read client comments during the session, I made plans for phone briefs before and after each group. In case of ‘emergency questions’ during a group, my client was able to text me on my mobile phone.

- **Fewer participants in each group:** We reduced each group to three to four participants vs the six planned for the in-person research. Webcam discussions, by their very nature, require more moderator control to prevent everyone from talking over each other. The one-at-a-time discussion means we can learn more from each person, but at a slower pace than is typical in an in-person focus group.

- **Anticipating a need for ‘tech time’:** Invariably at least one participant will struggle to log on or get their audio and video to work, delaying the group start. Be safe and add an extra 10 minutes to your group to prevent short-changing the discussion.

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Fiona is the founder of Ready About, a consumer insights consultancy focusing on delivering strategic, action-oriented brand guidance. She was an early adopter of digital methods and often advises clients and colleagues on new approaches. Fiona is co-chair of the QRCA Chicago Chapter and the B2B SIG, and is the Speaker Committee co-chair for the 2021 Annual Conference.