Which Way Do I Go at the Intersection of Authenticity & Appropriateness?

“Charting a Course Through Politically Correct Language and Plain Speaking”

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Purpose:

To provide participants with tools, tips, and techniques to navigate a course through the minefields of client work while being true to who you are as a QRC - Qualitative Research Consultant.

The power of Qualitative Market Research [QMR] rests in the ability to have respondents provide below top-of-mind answers about products, services, ideas, and advertising to a stranger – often in front of a one-way mirror, recording devices, and observers.

This presentation will be in five parts:

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Overview

QRC’s who take on this challenge have a lot to manage including:

- Research Design
- Screening to Get Correct Rs
- Clarity on Project Purpose
- Moderator’s Guide based on Study Objectives
- Managing R Dynamics
- Probing to Get Below Top-of-Mind
- Creative Activities to Keep Rs Engaged
- Managing the Backroom

When the work with Rs is over the moderator also has to:

- Analyze Findings
- Write Report
- Present to Client

Overview

Multiple opportunities exist to communicate with clients:

- Electronically
- In Person
- Phone

In doing so, myriad ways exist to make each communication a useful one or one that causes misunderstandings between client and QRC, and/or loss of confidence in the QRC.

As well, the society is “ISMs” can emerge in these communications:

- From both sides: the client and the QRC
  - Ageism: [Client is old Fuddy-Duddy - QRC is young Whippersnapper]
  - Sexism: [Client and QRC are opposite genders]
  - Racism: [Client and QRC are of different races]

A. Six Qualities of a Good Moderator
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There are about 25 best practices that a good moderator should be adept at delivering when doing QMR. The six mentioned here are critical in that they set the “good moderators” apart from the “great moderators.”

Regardless of any of these factors:

- Tattoos
- Body Piercings
- Comfortable in jeans/T-shirt
- Blue Hair or Dreadlocks
- An Accent
- Talk using a lot of slang/jargon
- Not an “expert” on the topic
- Religion based jewelry
- Wear an amulet against evil

You have to be a good/great moderator to stand in front of a client and deliver high quality research elements from research design to final presentation.

The items on the above list are just places where you have to decide:

- Is this item important to the client (what they prefer/desire)?
- Will this item (which is who I am) stand in the way of effectively working with a client?

A. Six Qualities of a Good Moderator

1. Practices UPR
2. Probes for latent meanings/intent
3. Practices sophisticated naiveté
4. Conducts active listening
5. Uses J-5 stems for 80% of the Q’s
6. Clear on study purpose and intended outcomes

A. Six Qualities of a Good Moderator

1. Practices UPR

The letters stand for Unconditional Positive Regard—a term created by Dr. Carl Rogers in the 1950’s. As an expert in group dynamics, Dr. Rogers realized that if he didn’t hold any judgments about the people in the group he could really hear them! It takes a bit of practice to look past language, clothing, hair, demeanor, etc. and see “we are all the same” in front of you with something to say worth hearing.
2. Probes for latent meanings/intent

Probing is the heart of QLMR. Probing is not a continuous cycle of “tell me more” or “help me understand” or “why?” Good probing uses a mix of the more than 50 great probes to allow R’s to access information well below top-of-mind. A few that always work:

- What did you say to yourself when…?
- How did you arrive at that point of view?
- Which element served as the tipping point for you?
- What have you seen, read, heard, or been told about _____?

3. Practices sophisticated naiveté

This device is intended to let R’s that you aren’t “dumb” but rather “curious.” Some ways it can be used:

Hair Care Study: I know what conditioner does for my hair, but I’m curious about other benefits. I don’t know what you are doing with your hair.

Pet Food: I had a cat a long time ago and I know what she liked to eat and what she left in the bowl. I’m clueless about what goes in a dog’s bowl or what they should never eat.

4. Conducts active listening

By its very nature, listening is mostly invisible. Proof might look like this to a R:

- Moderator makes eye contact while R is talking and doesn’t break away to check guide
- Moderator follows up with a salient probe
- Moderator links back to something said earlier, uses that as a springboard and creates the base of a new Q

The power of active listening is the encouragement of more conversation from R’s – you look and act interested in what they have to say – they tend to say more. The challenge for moderators: If it looks like you are doing a “thing called listening” it will not produce the same results.
A. Six Qualities of a Good Moderator

5. Uses J-S stems for 80% of the Q’s

A Q stem is the first word of a Q. Stems should be varied across the moderator’s guide and the ones that invite deeper conversations start with one of these:

- Why
- What
- Where
- When
- How

Stems to avoid:

- Do you think...
- Did you consider...
- Would you buy...
- Will you ever...
- Can you tell me about...

6. Clear on study purpose and intended outcomes

When the moderator is crystal clear on the key reason for the QLMR study and knows what the client is going to do with the data when the project’s over, then every Q on the guide drives in that direction.

When the purpose shifts or someone higher up the food chain starts making requests to change that direction, problems can occur if the moderator doesn’t push back. Adroit language might look like this:

“I appreciate your interest in wanting to _____, but I’m not clear how that relates to the original study purpose.”

“What would you like me to give up, in order to include a section on _____ that is in the current guide?”
B. Five Roles Moderators Need to Know How to Play

1. Active listener
   - proof of listening:
     a. Moderator “leans in” – physically and mentally
     b. Great follow-up probes
     c. Listens “between the lines” not only at what is being said, but also what is not said

2. Mediator – holds the middle ground

3. Non-judgmental advocate for disparate points of view

4. Gate Keeper – is a advocate for the respondents

5. Nurturer

Moderators don’t just “moderate.” They are more like a one man band – standing alone with the ability to play many different instruments. They have to be able to change roles quickly and to do what is wanted and needed, regardless of how they might look to R’s or clients.
B. Five Roles Moderators
Need to Know How to Play

2. Mediator – holds the middle ground
   a. Makes sure there is a safe space for all types of responses
   b. Allows for competing viewpoints and holds all viewpoints as valid
   c. Makes sure that all R’s comply with ground rules
   d. Pulls tangents back by redirecting group to Q on the table

3. Non-judgmental advocate for disparate points of view
   a. Sincerely holds UPR at all times
   b. Finds ways to support an outlier without showing agreement
   c. Encourages disparate POV by asking: “Who sees it differently?”

4. Gate Keeper – is an advocate for the respondents
   a. Protecting them from clients who want to dismiss someone because they don’t like them or agree with their point of view in the discussion
   b. Making sure one group member doesn’t disrespect another
   c. Making sure that all are clear on the Q on the floor and any activities to be done
B. Five Roles Moderators Need to Know How to Play

5. Nurturer - It doesn’t matter if the moderator is a man or a woman— all moderators should support and protect respondents so they feel safe to share all points of view. A QRI’s role is to not just provide the PC response or the one that makes them the hero.
   a. Act like a “mother hen” to keep the chicks in line
   b. Does not “stroke egos,” rather makes sure that egos can shine by delivering unique points of view
   c. Keeps the space “safe” so respondents are willing to share all parts of themselves

C. Four Components of Authenticity

Definition of Authenticity:
True to one’s own personality, spirit, or character
Sincere with no pretensions
(Source: Merriam-Webster)

Just these few words describe a very complex quality and one that changes in different environments and situations.

See how you would answer these Q’s:
1. Am I authentic when going out on a first date with someone new?
2. Am I authentic when a dear friend asks, “Does this dress make me look fat?”
3. Am I authentic in answering when served a dish at a friend’s dinner party that everyone else seems to like, but I nearly gag when it touches my lips and the host says, “How’s the dish?”
C. Four Components of Authenticity

R’s want to be with a real person who is leading an interesting discussion.

R’s do not want to hear a set of perfect Q’s, delivered in perfect grammar.

R’s want to relate to someone they think is truly interested in what they have to say.

R’s want to feel like what they say is a “contribution” to the discussion.

R’s want to feel “valued” and “important” when delivering their comments.

How can a moderator create an environment that leads to these factors?

1. True to self – in the same way as with friends
2. Able to take responsibility for all behaviors
3. Competent in the role, but flexible in the situation
4. Sincere, without pretensions

An old adage: “She became my newest best friend.”

That is the way a moderator should feel about every R and it is nice when that circle is completed so the R feels the same way.

A best friend is one who:

a. Is direct without being rude
b. Is consistent – does not waver when challenged
c. Has your back
d. Listens with feeling the need to consider their next statement or Q
   Present in the moment and not distracted by their own thoughts
f. Listens without judgment

SOUNDS A BIT LIKE WHAT MAKES A GOOD MODERATOR!
C. Four Components of Authenticity

2. Able to take responsibility for all behaviors
   That means taking responsibility for what the moderator is doing, what R’s are doing, and what the client is doing.

   Reminder: The root meaning of the word responsibility is
   RESPONSE - ABLE

   In the context of QMIR that means being able to:
   - Problem-solve
   - Communicate early and often
   - Make lemonade out of lemons
   - Think and act creatively
   - Looks to see – “What is the greatest good for the greatest number.”
   - Willing to do what’s right, not what’s easy

3. Competent in the role, but flexible in the situation
   A. Know what needs to be done and moves toward getting it done

   Example: You know you have to find a way to get R’s to choose one of two concepts, neither of which had strong winning elements. So, in the moment moderator figures out a way to get R’s engaged by doing something creative like this:
   “If you served on the board of directors for this company and you got a bonus for increasing sales, which concept would you move forward and for what reasons?”

   B. Just because something is a good plan, or it worked elsewhere, it may not work in this current situation.

   Solution: Every group is different. Every time a moderator moderates, they stand on what has worked before. But sometimes the good plan, the nifty intervention, the order of the Q’s isn’t working.

   When that happens, follow the Rule of Holes. When you are in a hole, stop digging.
C. Four Components of Authenticity

4. Sincere, without pretensions

Sometimes the moderator has to “tell one on themselves” and be sincere in stating that a mistake has been made. It isn’t like much can be hidden in a room with a huge mirror and camera!

Example: The traditional model is to provide R’s with a generic study purpose, room disclosures, guidelines and then self-introductions. The moderator forgot to get the self-intros done before starting the first line of Q’s. They realize they haven’t done so, but now they are 20 minutes into the line of Q’s. Best thing to do: “I am so sorry. I forgot to have you intro yourselves. Let me do that now. Starting on my left, tell me your name, how long you have lived in this area and the last time you had to go to the DMV to handle something related to your vehicle?”

Example: A really great intervention got R’s to go way below top-of-mind to talk about product attributes. When the intervention got set up in first three cities it worked flawlessly. In the fourth city, a respondent said: “I don’t think a bottle can talk.”

Moderator said: “Pretend it can. What would it say about itself?” He repeated “Ma’am, bottles can’t talk.” Smart moderator said: “You are right – let’s move on to a different Q.”

D. Being Authentic & Meeting Client Expectations
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Up until about year 2000, business standards stood on the 1950’s in terms of dress, hair, jewelry, and generally accepted standards for business language, and relationship to management.

Starting around 2001, the whole world of business changed. Some examples:

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<th>PRIOR TO 2001</th>
<th>POST 2001</th>
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<tr>
<td>✓ Business Dress = “Suits and ties”</td>
<td>✓ Jeans ok for every day in corporate world</td>
</tr>
<tr>
<td>✓ Piercing/Tattoos – “Not accepted”</td>
<td>✓ “Do your own thing”</td>
</tr>
<tr>
<td>✓ 9-5 = Standard Workday</td>
<td>✓ Flex time models abound</td>
</tr>
<tr>
<td>✓ Client is always right</td>
<td>✓ Requirement to push back on client demands when they are at odds with “best practices.”</td>
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Some Q’s to consider:

1. Am I in the service business – providing a quality skill set to my clients?

2. Does what I want for my business align with what clients want from a vendor?

Challenge | Response
---|---
Clients want a mature QRC | Younger QRCs have to inspire clients that young = creative and they are masters of sophisticated naïveté and let R’s “do the work” rather than micro-manage the group process
D. Being Authentic & Meeting Client Expectations

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<td>Clients want QRCs who is like tofu (doesn't stand out in any way) - looks like the client team</td>
<td>Younger QRCs have to decide if they are willing to “act as desired” to get and keep clients [i.e., cover tattoos]</td>
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D. Being Authentic & Meeting Client Expectations

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<td>Clients want an “order taker” mentality in a QRC, not a “thinking partner”</td>
<td>QRCs have to decide - take orders and make mortgage payment; decline and hope for new project. One way to decline a client or recuse yourself is to use this phrase: “Looks like your needs and my skills are not a good match. I wish you the best in finding someone to meet your request.”</td>
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There are other challenges that face QRCs today. As we move into the open forum:

- Think about where you are at the intersection of authenticity and appropriateness and where it feels uncomfortable
- Look at where you feel like you have to bend to client desires or demands
- Look at where you feel like a “hired hand” rather than a “thinking partner” in client work

Raise those points in the Open Forum that follows.
Open Forum

What, if any, Q’s do you have about items mentioned in this presentation or comments about challenges you face?

Secrets of a Master Moderator

Authored by Naomi Henderson, co-founder and President of RIVA Training Institute.

Covers lessons learned from leading over 6,000 focus groups in 30 years.

The book is in three parts:

Part I: The World of QLMR
Part II: Focus Groups: Tools, Tips, Techniques
Part III: Moderator Musings: Essays for the 21st Century

The book does not need to be read in order. By scanning the table of contents, the reader can select a chapter to read on a topic of interest so that the book is not only full of “how to” information, but is also a resource for discussing issues and concerns that affect the qualitative research community.

For more info, visit amazon.com

THANKS!

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“We DO what we teach and we teach what we DO.”