WINTER 2018
VOLUME 17 • NUMBER 2

QRCA VIEWS

MANAGING THE SHIFT FROM IN-PERSON TO ONLINE

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Online Focus Groups
Hear
Here!
12 days from recruiting to report
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Average project schedule for four (4) InsideHeads online focus groups
100%
of InsideHeads research projects completed on budget
20+ yrs
ONLINE SINCE 1998
Moderator Welcome and thank you for arriving on time. My name is Maggie, and I'll be moderating tonight's discussion.
Leo Hi Maggie
John Greetings from Tulsa
Mimi Excited! 8)
Gil Hi
Moderator I'm excited, too!Our chat will last 90 minutes. Before we get going, tell me on what device you're participating.
Ben Android
Leo Windows 10
Moderator Kyle, on what device are you running,Windows?
Work computer
Petra iPad gen4
Von HP Inspiron, sorry
Ren MacBook
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Basu IMac
Gil Android
Nic iPhone
Mat
Moderator Your honest feedback is valued and appreciated. For each question I ask, please provide as much detail as poss
ih
Introducing Voice-to-Text Response Mode
Online Focus Groups
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Jenifer Hartt
Editor-in-Chief,
QRCA VIEWS Magazine,
Hartt and Mind Market Research
jenifer@harttandmind.com

Keep Stretching, Keep Growing

VIEWS features are pulled together with an eye to get you thinking: reflective thinking, making connections, and what's next for you. We hope that losing yourself in *VIEWS* will feed your excitement for QRCA's conference in January. Check out page 15 where 24 stretch-the-paradigm breakout sessions are listed. Savannah, here we come!

This issue transcends platform debates with articles that show you how to make all our qualitative methodologies sing. In our cover article, **Monika Wingate** talks about how to build empathy, get agile, and capture consumer experiences using online tools. Monika goes a step further and offers a strategic approach to differentiating your proposals that will have prospective clients clamoring for more of your magic. Toolbox author **Jen Dale** goes granular, so you can determine the research design (online or in-person) that will work for your clients' objectives and budget. She makes it easy!

We've got more to keep you stretching. Straight from her primary research, **Caroline Volpe** shares how you can create happier participants and more on-point insights. Creative problem-solving (CPS) facilitators **Karen Lynch**, **Alison Murphy,** and **Missy Carvin** offer ways you can leverage CPS's powerful technology in your qualitative practices. And if you've ever been tempted to add mystery shopping to your offerings, **David Lithwick** takes the how-to mystery out of it.

A personal favorite is **Pat Sabena's** reflection about the joys of conducting peer workshops across the globe. I was impressed with our Board's vision that, with the heart and energy of QRCs like Pat Sabena and Judy Langer, resulted in new QRCA chapters and strengthened relationships with QRCs in Europe, South Africa, Australia, South America, China, and Russia.

VIEWS has been enriched by **Kay Corry Aubrey's** series of fascinating interviews with eminent thinkers. In her latest Luminaries interview, author and founder of MIT's AgeLab, Joe Coughlin, sheds light on how to rethink products and recreate a consumer's experience. Kay also reviews Joe's book *The Longevity Economy,* where he shares how businesses that are designing products and services to meet the needs of older adults end up broadening their appeal to every age demographic. Both articles are must-reads.

The remaining book reviews focus on ways to sharpen your communication skills. **Susan Fader's** review of Sally Helgeson's *How Women Rise: Break the 12 Habits Holding You Back from Your Next Raise, Promotion, or Job* explores how self-deprecation (among other habits) keeps expert women out of the spotlight. In *Five Stars: The Communication Secrets to Get from Good to Great,* **Susan** writes about the persuasive power of storytelling and ways to turbocharge your communication skills. Last, **Randi Stillman** shares how you can leverage qualitative skills to develop powerful business relationships in her review of Scott Gerber and Ryan Paugh's *Superconnector: Stop Networking and Start Building Business Relationships that Matter.*

With 2018 rounding to a close, CPA Kenneth Malc gives independent researchers guidance through changes in the US tax law in his just-in-time Business Matters article.

A warm and grateful thank you to *VIEWS* readers and authors. Your commitment to our craft and passion for our business continue to inspire all your volunteer editors at *VIEWS*. Happy holidays and New Year!

QRCA Announces 2018-2019 Board of Directors

In September, QRCA installed the Board of Directors for the 2018-2019 term. Tom Rich is the Association's President, Kelly Heatly serves as Vice President, Caroline Volpe is Treasurer, and Roben Allong assumes the role of Secretary. Newly elected to the Board this year is Pam Goldfarb-Liss. Re-elected to a second term are Ilka Kuhagen and Janet Standen. They are joined by Isabel Aneyba and Laurie Tema-Lyn, who are continuing their Board terms, to round out this year's Board of Directors. The Association further recognizes Jay Zaltzman and Regina Szyszkiewicz who completed their Board service this Fall.

QRCA VIEWS

1000 Westgate Drive, Suite #252
St. Paul, MN 55114 USA
info@qrca.org
www.qrca.org

Phone: 651-290-7491
Fax: 651-290-2266
Tel (toll free in N. America):
888-ORG-QRCA (888-674-7722)

Tom Rich
Thomas M. Rich & Associates
Mountainside, NJ
tomr@thomasmrich.com

Exquisite Agony's Antidote

It's the QRCA *VIEWS* Winter Issue, and that means the QRCA annual conference is right around the corner. QRCA's conferences differ from other marketing research conferences in that they are almost entirely focused on education and professional development. With that in mind, the organizers of this year's conference have taken a number of innovative steps to increase its educational value. For one thing, they've gone to great lengths to ensure that, in addition to content of a quality unmatched by other marketing research conferences, **this year's conference will offer an environment intended to maximize each attendee's opportunities for learning.**

We'll begin with the location: Savannah. It's a lovely, unspoiled antebellum town with a beautiful park or square every few blocks. Live oaks, Spanish moss (which, by the way, is neither Spanish nor moss), friendly people. You'll feel rejuvenated just walking the streets.

Let's face it: what's the point of going to all those great presentations if you're not in the right frame of mind? Well, this year there will be three early-morning Healthy Connections events—up from the two we've had in the past. Do some yoga, try some movement meditation, or groove to some aerobics. Three opportunities to help your body take care of your mind.

This year we'll also have a centrally located area where attendees can get a little work done. Need to get a screener written or take one last look at that report before you send it? Have to jump on a client call or respond to a few emails? Now you won't have to search for a quiet corner or walk all the way back to your hotel room. Instead, there will be a comfortable area right near all the action where you can set up, do your thing, and then get straight back to the conference.

This year's conference is also designed to allow you to get the most out of each presentation you attend. There will be a final event on Friday, the last day of the conference, during which you can interact with the conference speakers to discuss what they shared during their presentations. This is your big chance to pick the prodigious brains of some of the most accomplished practitioners in the business—don't pass it up.

In the past, the "exquisite agony" (full disclosure: I stole that phrase from Jay Zaltzman) of the QRCA conference has been that you can attend only one session in each breakout slot. As Ursula the Sea Witch remarks to Ariel in *The Little Mermaid,* "Life's full of tough choices, isn't it?" Well, life may be about tough choices, but the QRCA conference no longer is. So, here's some big news: all 23 presentations at the conference will be professionally video recorded. After the conference, these recordings will be available for online streaming only to conference attendees at no additional charge. So if you want to re-watch a session you attended in order to get the most out of it, you can. And if you were unable to attend a session, no problem—you'll be able to watch the video recording after the fact.

Put all of this together, and this is going to be a conference designed to supercharge your professional development. I look forward to seeing all of you there.

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QRCA encourages members to add your clients to our magazine distribution list. Help keep QRCA (and yourself) top of mind with research buyers—and help expand our circulation while attracting and retaining advertisers. Send names and contact information to Laurie Pumper (lauriep@qrca.org). All client information will be kept strictly confidential and will not be shared with members or other organizations. If your clients would like to receive emails regarding our Qcast webinars and/or publication of the digital version of the magazine, please provide email addresses.

2019 QRCA ANNUAL CONFERENCE

·Charting Your Best Course·

JANUARY 30 – FEBRUARY 1, 2019 • SAVANNAH, GA

DON'T MISS THIS VALUABLE EXPERIENCE!

Register now to cultivate your skills and elevate your research.

Join us for the 2019 QRCA Annual Conference in Savannah, Georgia!

The 33rd Annual QRCA Conference offers more content, networking opportunities, and conference perks than previous years, all at the same registration price. Enjoy access to amazing content, new technology, and unparalleled networking in a vibrant city on the river. Be ready for a voyage of exploration, learning, and sharing.

Chart Your Best Course for 2019 at the QRCA Annual Conference:

- 23 practical and thought-provoking content sessions
- 20+ interactive learning and guided discussion opportunities with fellow researchers
- 3 scheduled chances to focus on your health and well-being
- 3 nights with scheduled cultural and dining opportunities to socialize and network
- Our keynote speaker will show you how to be more memorable to clients, respondents, and colleagues
- An extra hour to connect and have a dialogue with your favorite speakers
- Delicious Southern-inspired food and drinks
- An exhibit hall chock-full of the best new resources, latest tools, and top-rated facilities
- A spicy sprinkle of Southern flair
- A huge handful of supportive community vibes and fun

Go to QRCA.org/2019 to register now!

2019 QRCA Annual Conference Co-chairs: Sidney Clewe & Anya Zadrozny

WHY YOU MUST ATTEND the QRCA Annual Conference

Keep Current

There is no better place to keep up with what's happening in the qualitative research industry than the QRCA Annual Conference. This year, you can choose from 23 breakout sessions to maximize your learning and your money.

Grow Your Business

Whether you're relatively new or have been in business for decades, you're sure to be wowed by the hands-on workshops and info-packed sessions. Expect to come away with items you can use right away to improve your business.

Abundant Collegiality

First-timers are often stunned by the amount of sharing that happens at the QRCA conference. We may be competitors, but we are all interested in raising the level of professionalism in our industry. As they say, a rising tide floats all boats (and we'll all float ours down the Savannah River in January)!

By Researchers, for Researchers

The QRCA Annual Conference is a mix of top veterans and bright newcomers, coming together to talk about joys, challenges, and solutions in qualitative research. This is a great chance to learn the best hacks, tips, and tricks from your peers.

Go to QRCA.org/2019 to learn about more conference offerings.

A Keynote You Won't Forget!

Our 2019 QRCA Conference keynote speaker, Dr. Carmen Simon, is a Silicon Valley entrepreneur, cognitive neuroscientist and speaker. Her keynote address is about a groundbreaking approach to creating memorable messages that are easy to process, hard to forget, and impossible to ignore—using the latest in brain science.

We are extremely lucky to have Dr. Simon as our keynote speaker. But, don't take our word for it. Here is what QRCA member Janet Standen had to say after seeing Dr. Simon speak:

> *"Carmen Simon is the real deal… Whether sharing your research insights or wanting to make your own business message more memorable, Dr. Simon will help you have real impact using her science-based examples and very tangible advice. In today's world where messages are coming at us from every direction, ALL of the time, her fact-based presentation helps provide clarity about what is required to stay in people's minds."*

Together we will learn how to convert neuroscience insights into practical guidelines. We promise it will be an unforgettable experience. Learn more about our keynote speaker at QRCA.org/2019

Enjoy Beautiful, Historic Savannah

The lush, evergreen and ever-growing city of Savannah, Georgia is known as the first planned city in America. Our conference hotel is right on the bank of the Savannah River. We can't think of a better backdrop to learn, connect and share.

Exposure to Invaluable Vendors Serving Our Industry

The Marketplace offers a wide range of exhibitors, showcasing the latest tools and top-rated facilities. Meet them face-to-face and learn about the latest products and technology that can help you.

Unwind and Have Fun!

It's not all business. This is not a stuffy conference where you will want to hide in your room between sessions. There are multiple social events, door prizes, and our Southern Irish party will let you unwind and have fun.

OVER 20 BREAKOUT SESSIONS

(Practical and thought-provoking presentations):

HONE METHODOLOGIES

Update your toolbox with new approaches and fresh twists on proven techniques.

- Easy to Use Theater Games for Energy, Insights, and Ideas
- Using Storytelling to Uncover Hidden Truths
- The Hidden Forces that Shape Our Decisions
- Primp Up Your Projectives
- Let's Cut the Judgment! Tricks and Tips for Helping Your Clients Connect with Respondents
- 20 Pounds of Potatoes in a 10 Pound Bag: How to Manage 3+ Hours of Stimuli in Less Time
- Opening Closed Doors with Role Play
- Catch & Release: Applying My Experience Learning to Fly Fish to Using New Recruiting Tools and Services

EXPAND THINKING

Bolster your approach by gleaning insight from outside traditional qualitative research.

- UX Live! Revitalizing the Customer Experience
- Elevating Market Research through the Power of TV
- What Qual Can Learn from Coaching
- How to Develop a Customer Journey
- Design Thinking — Process and Case Study

BUILD BUSINESS

Explore ways to grow your business through new avenues and better proposals.

- Bid Adieu to Bad Proposal Habits
- Better AND Faster? It Can Be Done! Hacks and Other Techniques that Will Help You Scale Your Business without Losing Your Mind
- Superqualitative! Using Your Skills Beyond Marketing Research

REFRESH CONVENTION

Discover leading-edge ideas on all aspects of qualitative, from recruiting through reporting.

- Using the Power of Podcasts to Explore, Collect, and Deliver Insights
- Sex, Drugs, and Other Recruiting Taboos, Otherwise, "What GOOD Girls and Boys Do"
- Assuring REAL Diversity in Qualitative Research
- Many Ways to Tell a Story: Exploring Different Approaches to Displaying Data
- Opening Closed Doors with Role Play

TACKLE TECHNOLOGY

Keep up with growing trends and practical ways to employ technology in your qualitative practice.

- Marketing Technology + Human Insights = Untapped Opportunities
- The Wonderful and Maddening World of Webcam
- Using AI to Quantitatively Analyze Qualitative Data

Head to QRCA.org/2019 for the full conference schedule

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Save 25% if you are a new QRCA member attending the conference for the first time.

Get a discounted rate if you're a qualitative researcher in a country with a per capita GDP of less than $30,000.

Email assistantexdir@qrca.org to receive your discount promo code before registering online. Restrictions apply.

$189 FOR SINGLE/DOUBLE ($214 TRIPLE/$239 QUAD)

Hotel cut-off date is Jan. 8
To make hotel reservations, visit QRCA.org/2019

HYATT REGENCY SAVANNAH

Our conference hotel, the Hyatt Regency Savannah, is an elegant, contemporary waterfront hotel in Savannah with direct access to River Street and the Historic District. You will be within walking distance of historic parks and squares as well as year-round festivals and celebrations. Make yourself at home in the newly-restyled rooms, and enjoy learning in their fully-equipped meeting rooms. Expect complimentary Wi-Fi in your guest room and throughout the conference meeting spaces and hotel common areas, as well as an indoor swimming pool and a 24-hour fitness center featuring state-of-the-art equipment.

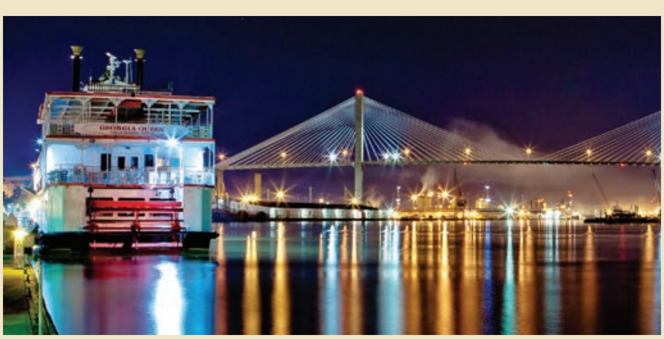
Hyatt Regency Savannah • 2 West Bay Street • Savannah, GA 31401

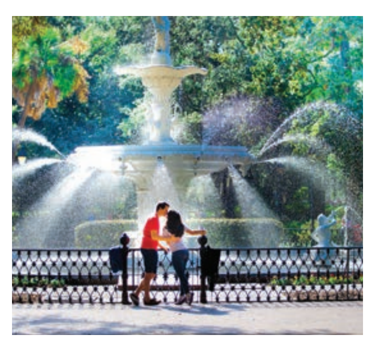
PRICING DETAILS

	On or before 12/12/2018	After 12/12/2018
Members	$945	$1,095
Qualified Non-Members	$1,395	$1,545
NewQ and Grad Students	$475	$625

Register now at QRCA.org/2019

FINANCIAL NEED: QRCA members who do not currently have the financial resources available and want to attend the conference can contact Shannon Thompson for information about financial support at exdir@qrca.org.





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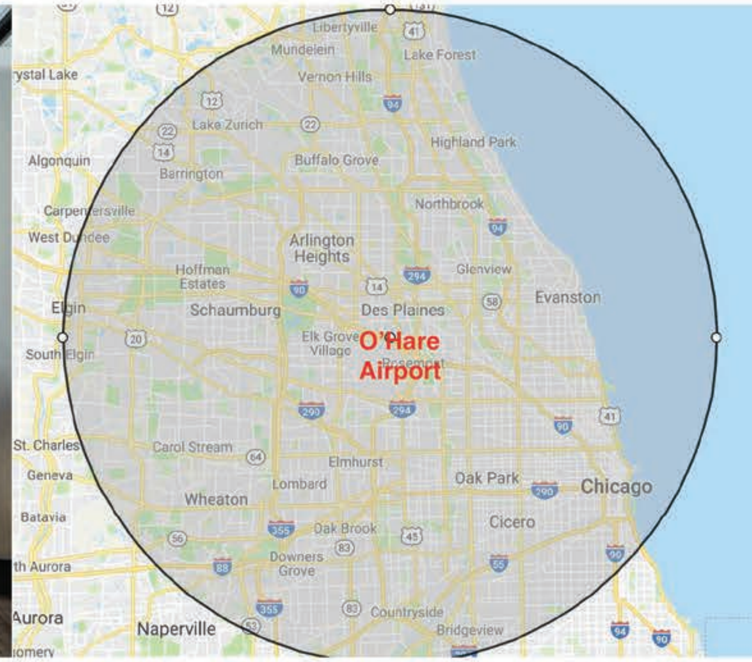
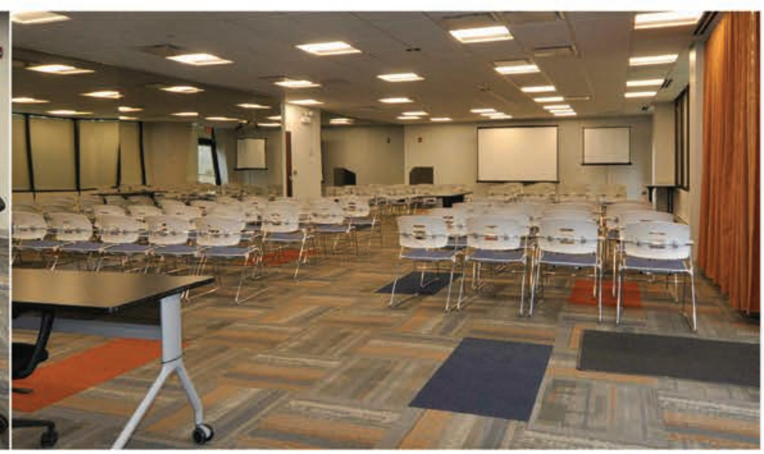


20 Mile Recruit Radius

Magic Curtain Hides Display



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By Monika Wingate
CEO and Co-Founder
Digsite Inc.
Madison, WI
monika@digsite.com

MANAGING *the* SHIFT
FROM IN-PERSON TO ONLINE

Most of us have spent the better part of our careers using in-person research to drive deeper consumer insights and empathy. Whether we were at a focus group facility or watching people in-market, there is power in observing facial expressions and body language.

But a lot has changed in the past few years. The use of social media and mobile devices has matured along with the use of consumer insights communities that don't require in-person moderation or travel. According to the Fall 2017 GreenBook GRIT report, online communities have been adopted by 60% of researchers, while webcam interviews and mobile ethnography have exceeded 40% adoption. Client teams want to tap into the power of online qualitative to capture in-context experiences, quickly understand problems, and iterate solutions. And more importantly, they are looking to technology to help them address the challenges they face with timelines and budgets.

If your clients are missing the advantages of newer qualitative methodologies, becoming familiar with the advantages that these methodologies offer may help you sell them in.

What Can Online Qualitative Accomplish?

Whether your focus is marketing, innovation, or customer experience, many of the research objectives you traditionally achieved through in-person research can now be satisfied in an online environment—often with better results and at a lower cost.

Example: Building Empathy

Focus Group	• What prompted you to remodel your bathroom? • Where did you go for ideas/inspiration? • If remodeling was like an amusement park ride, which ride...
In-Home Interview	• Show me your remodeled bathroom • Where did you go for ideas/inspiration? • Tell me about your remodel process step by step
Online Qualitative	• What prompted you to remodel your bathroom? • Post pictures of the products/websites you looked at for inspiration • Take a short video of your bathroom and share the good/bad

We're not simply talking about online focus groups, in which these same groups of people chat via video instead of in a room together. Rather, newer approaches to online qualitative bring participants into social media-style spaces where they can have private or group conversations with moderators in addition to sharing real-time experiences. This approach offers much more flexibility and richer data quality than the online tools that existed even five years ago, because technology allows the researcher to go places not typically accessible through traditional methodologies.

With that in mind, let's look at three common objectives historically reserved for in-person research: building empathy, iterating on ideas, and capturing customer experiences. While not all online tools offer the same set of capabilities, this should give you a basic idea of what to expect from modern online qualitative research methods.

Building Empathy

One of the biggest gaps left by big data and quantitative research is empathy. If we can't relate to the emotional aspects of our target—their joys and frustrations—it's very hard to prioritize and communicate product features, brand messages, or category innovations.

In-person and online qualitative provide different data on empathy. Think of it as the difference between how you relate to your family when you meet them in person versus what it's like to send them an email or a message on social media. In all three cases, you can get rich emotional context. But the way you share and communicate is clearly very different.

Imagine we want to understand more about the home improvement market and bathroom remodeling. In the graphic example "Building Empathy," you'll see how your research approach might differ in a traditional focus group or in-home interview vs. online qualitative. In the focus group example, you might ask the group a series of questions about their remodeling processes, potentially drilling down further with two or three participants before moving on to the next question. To get the group to share feelings that might be hard to articulate directly, you might use a projective technique to get the participants to relax and open up.

In an in-home interview, you might be focused a bit more on show-and-tell, drilling deeper with each person on the details of their specific process and looking for unarticulated problems or needs.

With online qualitative, you get a bit of both. You can ask a series of questions and probe with individual or group follow-ups, and you can also get show-and-tell type insights by having participants share photos or videos that they have captured using their mobile phones. You can have them post timelines or journal activities, or even use virtual projective techniques like collages or image sorts.

Iterating Solutions

Today, marketing teams are under pressure to be agile. Per a 2018 AgileSherpa study, while only 37% of marketing teams have adopted agile practices, 60% say they intend to in the next year. It is important to understand that agile does not mean simply doing the same work faster. The premise behind agile is for business teams to collect richer contextual information while they develop new or improved products, ads, packaging, online experiences, etc. This enables them to iterate as they learn, improving quality, reducing rework, and ultimately speeding up the time to market. Because of this focus, agile qualitative may supplement or replace quantitative tools in later stages of development. It also means that teams could forgo large qualitative projects completed at the beginning of development for smaller projects completed on the fly.

This is one area where online qualitative methods can really shine. One of the advantages of online qualitative is the ability to build, optimize, and iterate on ideas while engaging with consumers. The graphic "Iterating on Concepts" illustrates how this works in-person and online, either within a single group or across multiple groups.

Let's say we have some early ideas for bathroom products that can help increase usable counter space and storage. When building concepts, you are typically looking to prioritize needs or benefits, get detailed feedback on a series of concepts, and either narrow down the list of concepts or create new concepts based on your learning.

Online qualitative has some distinct benefits over in-person research in this type of research:

- **Larger sample sizes:** You gain some benefits typically associated with quantitative research such as larger sample sizes (i.e. n=50-100) and national samples.

- **Less bias:** Online qualitative enables you to minimize bias by randomizing concept orders and having participants give private feedback before group discussions.
- **Easier follow-up**: It's easier to extend online studies to follow up with participants days or weeks after their initial response, giving the team more breathing room to generate new solutions and bring them back to participants.
- **Faster analysis:** Some online tools have automated reporting capabilities that tally votes and ratings, identify common themes in open-ended responses, and generate client-friendly reports. This is helpful for interim reporting during rapid iteration.

Online qualitative for concept iteration also allows participants to make more direct comparisons to competitive products or services they are familiar with or currently using, instead of being limited to competitive stimuli you might share with them at a focus group facility. In other words, by doing research in their own homes where they use competitive products, participants might provide data that you wouldn't get during a focus group because they can draw on their own environment and real-time experiences instead of being prompted by a specific, more artificial stimulus that relies on recall.

Example: Concept Iteration

Focus Group or Interview	Online Qualitative
• What are your biggest needs for counter space/storage?	• What are your biggest needs for counter space/storage?
• Prioritize top needs identified by group	• Vote on top needs identified by group
• Show concepts to rate/discuss	• Show concepts to rate and mark up
• Discuss which solutions they liked best and why	• Participants build their ideal solution

Capturing Customer Experiences

Capturing and understanding experiences is a critical part of succeeding in the market. Whether you are looking to develop new solutions or improve current products or services, the gold standard for understanding experiences has been ethnographic research, a combination of live observation and interviewing target audiences.

In the age of selfies and mobile video, consumers are more interested than ever in sharing their experiences with brands—without the invasiveness of having anyone stand over their shoulders. As a result, an entirely new level of insights has been achieved simply by asking consumers to record their experiences on their computers or smart devices.

In the sidebar on page 21 (Capturing Experiences), we have types of in-market

5 WAYS to Sell Clients on Online Qualitative

You've come up with a great approach to a research problem using online qualitative. But, after considering multiple proposals, the client decides to go with in-person research. The reason they cite? It's what the team has done in the past and is most comfortable with.

1 Build in Unique Engagement Opportunities

Online qualitative can collect both broader and deeper insights than in-person research, and often encourages a level of honesty that respondents would never exhibit when conducting research face-to-face, but your clients might not know or understand that. Be sure to bring to life unique opportunities to combine observation, one-on-one engagement, photo/video sharing, and group interaction. Help them understand the value that privacy and anonymity can offer for sensitive topics, and the value of flexible timing for participants to share photos, videos, and other information that would be hard to get in a two-hour focus group. Show them how your online approach leverages your expertise with in-person research with newer, more flexible online tools.

2 Design Iteration into the Process

Most qualitative research is designed both to explore consumers' attitudes, context and behavior, and help drive specific business decisions and to help. As you learn which decisions your clients are making, see if a more iterative approach, which is much easier to accomplish in online research than in-person, can get them farther along in the decision process without having to do another research study. Perhaps it would make sense to build in time for team discussion and adjustments to questions or stimulus between the observation, discussion, prioritization, or feedback stages of the research project. Or, you might want to create a single, multi-step research project that focuses on understanding consumer needs, then revising/getting feedback on product/service features, and finally developing packaging or messaging.

3 Develop Holistic Solutions

Online tools give you the flexibility to design hybrid research studies that nail a client's research objectives in a way that would be too costly and time-consuming with in-person research. Consider using a larger qual/quant sample to capture better representation of subobservation or ethnographic research you might do in-person vs. online.

Video and photo technologies are front and center in online solutions. While there may be occasions where you want to be physically present, most situations can be covered through either a live video interview or a combination of video sharing and follow-up questions.

Example:
Capturing Experiences

In-Market Observation

- Meet at a big box store to observe shopping process
- Meet in-home during remodel project
- Bring video/photo diary to focus group

Online Qualitative

- Participants record video and post photos of their shopping followed by online interview
- Schedule a live video chat with participants in their homes
- Upload photos/videos and discuss/respond in group forum

Online qualitative offers several other advantages compared to in-person research. Social media-style platforms enable more longitudinal observation, and they allow you to ask both group and individual follow-up questions. You can use embedded video analysis software that makes it easy to find themes, capture key quotes, and build video clip reels that speed up the process of sharing results and acting on findings. For UX projects, web-usability platforms can capture heat-maps tracking mouse movements and capture video and audio of participants completing specific online tasks.

The Advantage of Online Qualitative for Marketing Teams

As these examples demonstrate, in many cases online qualitative improves the quality and richness of the data you can collect in-person. Online qualitative also works within much faster timelines than traditional in-person research, delivering valuable benefits:

- **Time savings:** There are fewer travel and logistics issues for your team.
- **Faster recruiting:** Top online qualitative recruiters have high-quality samples that can be recruited in hours or days rather than weeks.
- **More representative:** Enjoy geographic diversity and the opportunity for larger sample sizes.
- **Richer responses:** Get better data thanks to detailed one-on-one responses plus rich group discussions.
- **Minimize bias:** Reduce bias by responding individually before group discussions and randomizing concepts during the process.
- **Faster reporting:** Produce instant summary reports and sentiment analysis to get results quickly.

As qualitative researchers, it's our job to help bring these benefits to our internal or external customers, rather than relying on only what we have done in the past. Embracing these new, robust technologies allows you to become the qualitative hero who brings greater agility and new insights to your clients and colleagues.

groups, have participants capture video responses, or mix one-on-one interviews with group discussions to drill deeper. Maybe even consider some one-on-one video calls or ethnographic interviews with a selected group once you find that bulls-eye target. These options are possible and relatively affordable in an online context.

4 Build Your Own Agile Toolkit

If your studies typically take four or more weeks from kickoff to report, you might not be considered for agile research opportunities. Many researchers are looking for qualitative approaches that are both rich **and** fast. To win these types of research initiatives, you need to embrace automated tools for everything from recruiting to rewards to analysis. You may even want to consider a mix of moderated and unmoderated activities. Sharpen your agile qualitative toolkit and let your clients know that you can handle projects that take days, not weeks, from kickoff to topline.

5 Price it Right

It used to be that online qualitative costs the same or more than in-person research. If that is still your pricing model, you may not be winning online qualitative bids because your pricing is just not competitive. So how should you price online qualitative? First, consider how you are finding and rewarding your sample. There are high quality online panels and recruiting methods that are designed specifically for online or mixed-method qualitative research. These approaches often cost significantly less than recruiting for in-person research and can save you significantly on incentives. Next, consider how you are estimating your billable time. Agile research tools should save you time by automating tasks such as monitoring participation levels, analysis, and keyword coding, and even transcribing videos and building clip reels. This saves the client money while allowing you to focus your time and energy where your skills matter most: designing a study to meet your client's objectives and identifying the key insights for a highly valuable analysis/report.

By using these five strategies to differentiate your online qualitative proposals, you stand to improve your likelihood of getting your clients onboard with online research. Once they start seeing the benefits of online research for themselves, they are likely to want more of it!

GET ON THE FAST TRACK

—to Creative Problem Solving and Ignite Your Qualitative Practice—

> "Imagination is more important than knowledge. For while knowledge defines all we currently know and understand, imagination points to all we might yet discover and create." — Albert Einstein

This summer, I attended a Creative Problem Solving Institute workshop on creative problem solving (CPS), presented by the Creative Education Foundation. I asked three CPS specialists—all current or former QRCA members—to share their perspectives on how we can leverage this intriguing mix of mindset, process, and skills to broaden and enrich our qualitative practice. Here's what these practitioners had to say.

— Schools of Thought Feature Editor
Tamara Kenworthy

Karen Lynch

- InsightsNow, Inc.
- Fairfield, CT
- karen.lynch@insightsnow.com

What Is Creativity?

My favorite definition (from psychologist Rollo May) is, “Creativity is the production of novel and useful ideas in any domain.” Useful ideas. Any domain. That means our domain too—qualitative market research.

Why Do We Need Creativity in Qualitative Research?

Have you ever found yourself ready to create a discussion guide and wishing you were inspired to include something different? Hoping to craft a question or a projective exercise that would be new, and therefore intriguing, for your client? Or maybe you’ve found yourself wishing for something to spice up your client debriefs or to break through a panic-inducing case of writer’s block. Creativity in qualitative research allows us to bring new ideas to the work we do and the ways we deliver insights to clients. It allows us to express novelty in our deliverables. It also positions qualitative researchers as imaginative forces in a world of big data and statistics.

What Gets in the Way of Being Creative?

Any list of barriers to creativity can be a long one. Fortunately, CPS is a powerful tool to help us overcome barriers to unleashing our creative, imaginative potential in our qualitative practices.

1. There’s a misconception that some people are just not creative. Well, that’s just wrong. Yes, some people are innately disposed to creating things out of passion or personality, but what about the rest of us? We just need to be freed from limitations, from experiences that stifled our creativity in our childhoods, and given tools to let our innate creativity manifest itself in all we do.

2. Some state they don’t have the time to be creative—they suffer from a desire to get things done and don’t want to take the time to stretch their minds. Better deliverables will make it worth the time it might take you to think creatively. Creativity is a skill that can be practiced, and in time, will come much faster!

3. Habits are in place that prohibit us from being imaginative. Imagination is a process that leads to the mental formulation of images or concepts. So, if accessing your creativity is not habitual, you won’t leverage imagination routinely.

4. Fear of failure and/or judgement is one of the hardest hurdles to overcome. Many human beings are inherently timid and afraid to try new things and put themselves out there. It takes self-confidence to leap over this one… and where do we get that confidence from? Practice (and we’ll show you how later in this article). In creative circles, we also celebrate failure… because without it we don’t grow (but that’s a topic for another article).

5. We lack the tools needed to be creative. The rest of this article is focused on Creative Problem Solving (CPS)—as a process, a framework. CPS is a set of tools that can be leveraged to overcome this last hurdle, as well as all the other ones.

The Dynamic Balance of Imagination and Judgement (or Divergent and Convergent Thinking)

We aren’t used to separating the tasks of using our critical, judgement mindset from our imaginative, creative mindset. Alex F. Osborn, the “O” in the iconic advertising firm BBDO, explains this beautifully in his ground-breaking book, *Applied Imagination,* first published in 1953. “We allow ourselves to be creative and self-critical at the same time… it is a little like trying to get hot and cold water out of the same faucet at the same time: the ideas may not be hot enough, the evaluation of them not cold or objective enough. The results will be tepid.”

When we keep our use of imagination and judgement in check—alternating between these two mental processes—we leverage the full potential of CPS. First,

The Creative Problem Solving Institute workshops offer fun, interactive sessions we allow our creative mind to visualize, foresee, and generate ideas. We allow it to enlighten us and then tap into our judicial thinking to analyze, compare, and choose. We use judgement to keep our imagination in check. It's a dynamic balance that makes all the difference in how we approach our creative efforts. And it's a polarity, like breathing in and breathing out; we need both to live.

In CPS, it is understood that we need both imagination and judgment to yield a creative output. Switching from an imaginative to a judgmental mindset is fundamental to being able to apply CPS's divergent and convergent tools. CPS practitioners rely on the creative problem-solving process to overcome the barriers to creativity. As a result, we create breakthrough ideas and solutions on behalf of our clients.

Alison Murphy

- Murphy Marketing Research/ TRENDTOWN
- Thiensville, WI
- alison@murphymarketing.com

Creative Leaders Know How to Solve Problems

Let's face it: the qualitative research industry has changed, and it's never going back to the way it was. It's not enough to be highly skilled in digging for insights; clients demand qualitative partners who step out of their comfort zones and demonstrate strong strategic and creative leadership in every aspect of a project.

> Highly effective leaders articulate a clear vision for achieving a desired outcome. In CPS, this "clear vision" is focused on a four-stage process—Clarify, Ideate, Develop, and Implement.

A fast track to this type of leadership is Creative Problem Solving (CPS). According to CPS pioneer Alex Osborn, creative thinking transcends age, gender, and education, and is largely a function of effort. Creative thinking is the first step toward creative leadership, a step that will propel you into the role of strategic partner, transcending the client-consultant hierarchy. The best definition I've heard for Creative Problem Solving comes from a creativity colleague, Jody Reed Fisher, who explains, "CPS is a mindset, a process, and a set of skills. Mindset can be grown, process can be applied, and skills can be mastered." The purpose of CPS is to solve problems. In CPS, a problem is defined as any area requiring new thinking and imagination. You might call it a challenge, a wish, or an opportunity.

Grow Your Leadership—and Research Skills—Through the CPS Process

Highly effective leaders articulate a clear vision for achieving a desired outcome. In CPS, this clear vision is focused on a four-stage process: Clarify, Ideate, Develop, and Implement.

Ever wonder how CEOs become successful? Staying in a problem-solving process is the key to thinking like a CEO. And, focusing on the CPS process gives you credibility to expand your capabilities beyond traditional qualitative methods. I find myself leading larger and more strategic assignments by simply asking the

The relaxed atmosphere of the CPSI sessions puts participants at ease question, "Where are we in the process?" This question reveals unknowns and assumptions that the consultant can then help address. And, clients will start to rely on you for problem-solving direction.

You can use this four-stage model, in sequence or separately, to identify and recommend the most strategic methodology for your clients. For example, if my clients want to evaluate concepts, which typically falls into the development stage, I ask if they have clarified the target's needs and behaviors. If the answer is no, I recommend starting with an exploratory insights phase prior to concept evaluation. The outcome yields more solid, consumer-driven concepts. In situations where a client is seeking new ideas, I recommend an innovation process designed to generate lots of ideas across different categories, instead of focus groups.

Here are some ideas on how you can incorporate these four steps into your research projects:

Clarify

Clarify means making sure we are tackling the right problem. When clarifying the challenge, goal, or wish, practitioners will gather data and explore their clients' vision to understand the contextual dynamics that have an impact on environment, category, and brand. If a client needs to clarify, recommend exploratory methods and techniques such as ethnography, journaling, shop-alongs, group mind mapping, that are designed to uncover the situation (not solve it).

Ideate

Ideation comes after clarifying! Here, you generate lots of ideas to address your challenge. Ideas must come from lots of sources, across categories, etc. Remember, ideas are not solutions; they are sparks to be flamed. Ideation uses specific innovation tools and techniques.

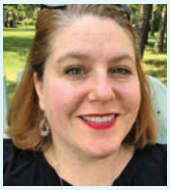
Develop

Developing means refining ideas and creating solutions. Most qualitative methods work well; the key is to seek ways to strengthen solutions and identify pitfalls. For instance, when doing concept evaluation, work to improve all concepts—regardless of whether the consumers accept or reject them.

Implement

After you have developed a solution, it's time to put together an action plan and implement. Types of projects that fall within this stage include facilitating strategic planning sessions, advertising and communications testing, and ongoing monitoring.

The more skilled you become in applying the CPS mindset, process, and skills, the more ingrained your level of creative and strategic leadership becomes. You naturally see challenges through a strategic lens and develop the confidence to guide clients toward new thinking and viable solutions.

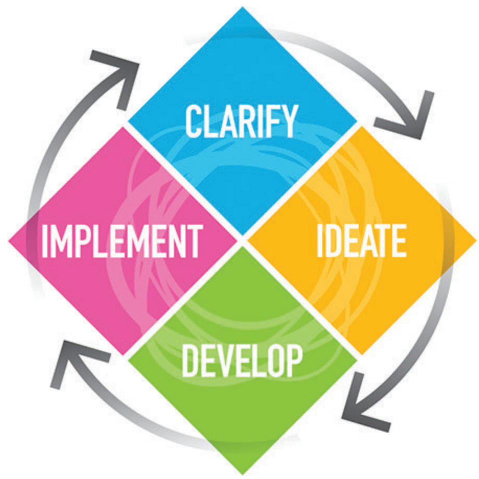


Missy Carvin

- New Directions Consulting, Inc.
- Maitland, FL
- missy@new-directions-inc.com

Using the "Invitational Language" of CPS

As a regular practitioner of the Creative Problem Solving (CPS) process, I found the specific language used throughout this process has wormed its way into my skull. Language is a critical element of CPS and is applicable to many situations.



Over the years, I've found myself using this language more often in my qualitative research projects. Let me be clear: I am not facilitating every client team or focus group through the CPS process. Rather, I find the invitational language stems cropping up in a variety of ways.

According to the Creative Education Foundation, specific language is used at different stages of the CPS process to prime the brain to enable novel, useful options and ideas. A key example of this specificity of language is the **invitational language** stems we use in the process.

Invitational language literally invites us to open our thinking in creative, divergent ways. What follows are examples of applying invitational language stems in the various stages of the CPS process.

In the **Clarify** stage, to get a tight handle on the actual problem or challenge, it helps to use invitational language such as *How might we?* and *What might be all the ways?* These phrases lead directly into more divergent thinking—we're not looking for a single solution but staying open to *lots* of ideas. Compare these stems to more closed language such as *What are our objectives?* or *How are we going to solve this?* Neither of these phrases leaves the door open to divergent, blue sky thinking.

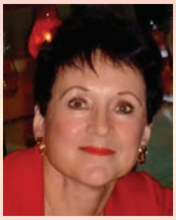
During the CPS process, after converging at the end of the **Ideate** stage, it's useful to complete the sentence, *What I see myself doing is…* This is one of my favorite language stems; it invites a single, unifying solution made up of the great ideas that were just generated and creates momentum to move forward to action.

In client conversations, there is efficiency in using clarifying language stems to set research objectives and methodology. Starting with *It would be great if…* statements about what they want to learn, we eventually get to *How to* and *How might we* as we design the research itself. Toward the end of the project, we come back to those wonderful **Develop** phrases such as *How to* and *How might we*. These bring the team into the frame of mind that they can overcome further challenges and create plans for action.

One of the most effective areas to use invitational language in qualitative research is within the discussion guide itself. Respondents want to help; they are looking to provide useful content for the client. When we open up the language and allow them to offer ideas and solutions, it becomes a mutually beneficial relationship. I don't think I've written a discussion guide in the past 10 years that doesn't include the phrase, *In what ways might we.* Inviting the respondent to articulate his or her own challenges, unmet needs, and issues within a category allows for a deeper discussion and better insights. Using these invitational language stems is a fast, efficient way to dive into that articulation.

The CPS process and invitational language can help from early stages of project design through streamlining report writing. When writing my reports, I ask myself, *How might I* distill this information? I also think about my conclusions and recommendations in terms of *How to* and use respondent quotes and behaviors to answer those questions.

Throughout the life of a qualitative research project, CPS language is extremely useful. It creates shortcuts to eliciting the kinds of thinking you want from clients, respondents, and yourself. It creates a framework around the project elements that invites new thinking and keeps options open until it's time to converge. Becoming fluent in CPS-style invitational language is not difficult. Once you learn the phrases and how they're best used, you'll likely find yourself using them all the time—and not just in a "work" context. Just ask my kids how often I've said, *"What might be all the ways you could not be bored right now?"*



By Pat Sabena
Sabena Qualitative Research
Sole Proprietor
Fairfield, CT
psabena@qual.com

AROUND THE WORLD

WITH PEER WORKSHOPS

As I step down from a seven-year role as QRCA VIEWS Global Features Editor, it seems like the right time to write about the joys and adventures—both personal and professional—of conducting peer workshops with far-flung fellow qualitative researchers across the globe.

Between 1997 and 2007, I and a handful of other North American QRCA leaders found the means to travel to England, Greece, South Africa, Australia, Brazil, China, and the Ukraine, where we led workshops and built many professional and personal bonds with international peers as eager as we to learn from one another.

For QRCA, these trips spawned new networks of global peers and QRCA chapters and helped launch the successful biennial international AQR/QRCA conferences of which we have had nine sessions—and counting—as of 2018! For me, they helped sate my lifelong international travel wanderlust!

Britain Was First (1997)

While I was still QRCA President (1995-1997), the Board granted the means to take a dozen QRCA members to meet and greet our European counterparts. We advertised ahead of time, and booked the Dorchester Hotel in London for a January 10, 1997, one-day workshop, "Differences between North American and European

Athens, Greece

Qualitative Research: What Can We Learn from each Other?" We had about 40 attendees, mostly but not all British, and a royal good time that exactly broke even financially.

This successful event made me reach out to colleagues in other countries whom I'd met through QRCA, ESOMAR (a global research and insights community), or my own international client work. I offered to do interactive workshops (usually at my own expense or with a small stipend to cover travel) if they could gather qualitative researchers for a one-day or longer event.

My primary goal at this point was for my hosts to start QRCA chapters in their own countries and headline our session as their inaugural chapter meeting. It would prove a workable goal!

Then Athens Responded (1997)

The first bite came from Greece—tied, conveniently, to an ESOMAR conference. I enjoyed ESOMAR in Athens and piggybacked the workshop right after it ended. On November 28, 1997, the Central/Eastern Europe QRCA Chapter had its inaugural chapter meeting. The event included an interactive, hands-on presentation of "Qualitative Research: Getting More Depth through Psychographics," topped off by "Here's 25 of the Latest Trends in Qualitative Research."

If memory serves, about eight qualitative researchers, cautiously eager to get to know each other, attended the meeting/workshop, and enjoyed a delicious Greek dinner together afterwards.

And South Africa (1998)

Next up was an invitation from Jane Green and Lee Kotze of South Africa to conduct the same program just outside of Johannesburg on March 13, 1998. My photo of that event shows about ten attendees. It was a warm and enthusiastic group of experienced and novice qualitative researchers ready to learn how they could build their businesses.

One of my twin daughters was studying in London at the American International University, and the workshop timing was planned to coincide with her study break. After the workshop, she and I happily vacationed together in nearby Namibia for a week. It happened to be the first time in 50 years that the barren, desiccated saltpans sprouted beautiful waving turquoise flora. This also sprouted a plague of locust-type insects. Every night in our open-air residences, huddling under the bed netting, we could hear locusts hitting the netting and dropping to the floor. Before we got up each morning someone came in to sweep them all away. This was certainly a great mother-daughter bonding trip filled with terror and laughter.

Six years later—in 2004—I was invited back to South Africa by Markinor (PTY) Ltd., to present "Getting the Most Out of Qualitative Research: An Interactive Workshop in Best Practices and Skills." More than two dozen qualitative researchers attended, some of whom I already knew from QRCA events.

And Down Under (1998)

A chance 1997 conversation at a conference with Susan Stancombe of Stancombe Research in Australia set up my next workshop, this one in Sydney, Australia, on May 12, 1998, with a fun group of Australian qualitative researchers.

Once again, the trip coincided with an opportunity for personal travel. My

Sydney, Australia

Sao Paulo, Brazil

oldest daughter was doing her junior year abroad in Brisbane at the time, so I went early to spend time with her on the Great Barrier Reef, as well as visit the family farm in the outback which had been part of her initial college orientation to Australia. I then headed to Melbourne and took the Great Ocean Road tour along the southern coast to see the limestone stack formations called the Twelve Apostles. (I've read recently that this long coastal road is now down to Eight Apostles due to sea erosion!)

By May 19, 1998, I had already arrived in Auckland to conduct a similar workshop for the Market Research Society of New Zealand. I was still using "Getting More Depth from Qualitative Research Through Psychographics" and "25 Trends," but at each workshop I learned things that I added to enrich the material further.

In the Meantime, South America Called (1999)

The late Eugenia Paesani, the doyenne of Brazilian qualitative research, cordially invited me to conduct a workshop in Sao Paulo, Brazil, on May 12, 1999. Eugenia and her staff did all the advance work. She and her driver picked me up at my hotel, and we took three hours to crawl across the traffic to the venue she had booked. I was frantic that we'd be arriving so late as to be rude, but she, three dozen members of the waiting audience, and the simultaneous translator hired to support us, all seemed blasé about the delay. We just ran late, and everyone was cool. I love Brazilians for so many reasons!

Apparently, Brazil does communicate with Argentina despite their different languages because SAIMO (Sociedad Argentina de Investigadores de Marketing y Opinión) soon contacted me asking for two days of qualitative research workshops in Buenos Aires. It was split into February 20 and 23, 2001, to accommodate Tuesday and Friday audiences.

By this time, even I was tired of my current decks and had prepared "An Update on 25 Trends (and Some Ideals) in Qualitative Research" and "Contemporizing Brand Equity: Two Case Studies," having gained prior permission to tell the stories of the successful relaunch of Herbal Essences hair care and the not-so-successful rebranding of Helena Rubinstein skin care and cosmetics.

China with Hy Mariampolski (2002)

Perhaps the most momentous globe-trotting opportunity came when Hy Mariampolski (QualiData Research) and I were contacted by the China Market Research Association to conduct two three-day workshops on September 4-6, 2002, in Beijing and on September 11-13, 2002, in Shanghai. We were provided with hotel accommodations and private tours of each city, as well as intra-China airfares. In the interim week between Beijing and Shanghai, Hy, his wife Sharon Wolf, and I boated down the Yangtze River just prior to its being flooded for the

Beijing, China

Learning projectives in Kiev

Pat and Judy Langer with Sergey and his moderators

$25 billion Three Gorges River electricity generation project. It was a timely opportunity, but sad to see how many families were being uprooted from their river homes and farms and relocated elsewhere.

Our workshops in China included two excellent simultaneous translators for those researchers not totally fluent in English. A total of 75 young qualitative researchers participated. We found the attendees eager to learn, but humble when we painted a picture of how far they and their country would go in the coming decades. I remember seeing a huge advertisement in a mall near the venue showing an Asian woman dressed in a Western business suit. The headline was “Believe to Become.” I used that as a teaching tool to convince our attendees that everything is possible if you believe in yourself and in the best practices and projective techniques we were introducing. Western clothes and western wedding dress shops were everywhere we looked.

To our surprise, after each full day of teaching, at promptly 6:30 pm, a limo picked us up and drove us to visit a different market research company. We interacted with their management for an hour and then continued on with them to a Chinese banquet. Memorable, to say the least.

Kiev with Judy Langer (2007)

In August 2007, Judy Langer (Langer Research) and I taught together at a large international workshop in Kiev, Ukraine. Our sponsor, Sergey Govorukha, wanted us to share our knowledge and experiences with about a dozen of his qualitative research employees. Judy and I put together a three-day workshop, “Qualitative Research Best Practices, Techniques, Challenges and More: What Can We Learn from each Other.”

We had a fascinating time with Sergey’s young moderators, who were, at first, laconic, but then thoroughly involved, sitting on the carpet, constructing collages. Sergey kindly took Judy and me on a city tour of beautiful Kiev. When we asked why there seemed to be so few elderly people in Kiev, Sergey explained that pensions had been severely cut by the government, so older folks moved out to the hinterlands.

Pat Sabena and Judy Langer

After the workshops, Judy and her husband Bernie left together to travel in Russia. My husband Dan flew into Kiev where we had a marvelous one-day tour. Then off we went to gorgeous St. Petersburg for four days as a prelude to a ten-day cruise to Moscow. On the S.S. Litvinov, we crossed the locks of Lake Onega to the Volga River. The cruise boat stopped at many villages along the way, where we were often greeted with the traditional salt and bread of Russian welcome.

Russia was indeed a wonderful experience. Our trip had beautiful, blue-sky summer days. All the Czarist palaces and museums had recently been restored with fresh coats of paint, thanks to money pouring in during the early days of Putin’s reign.

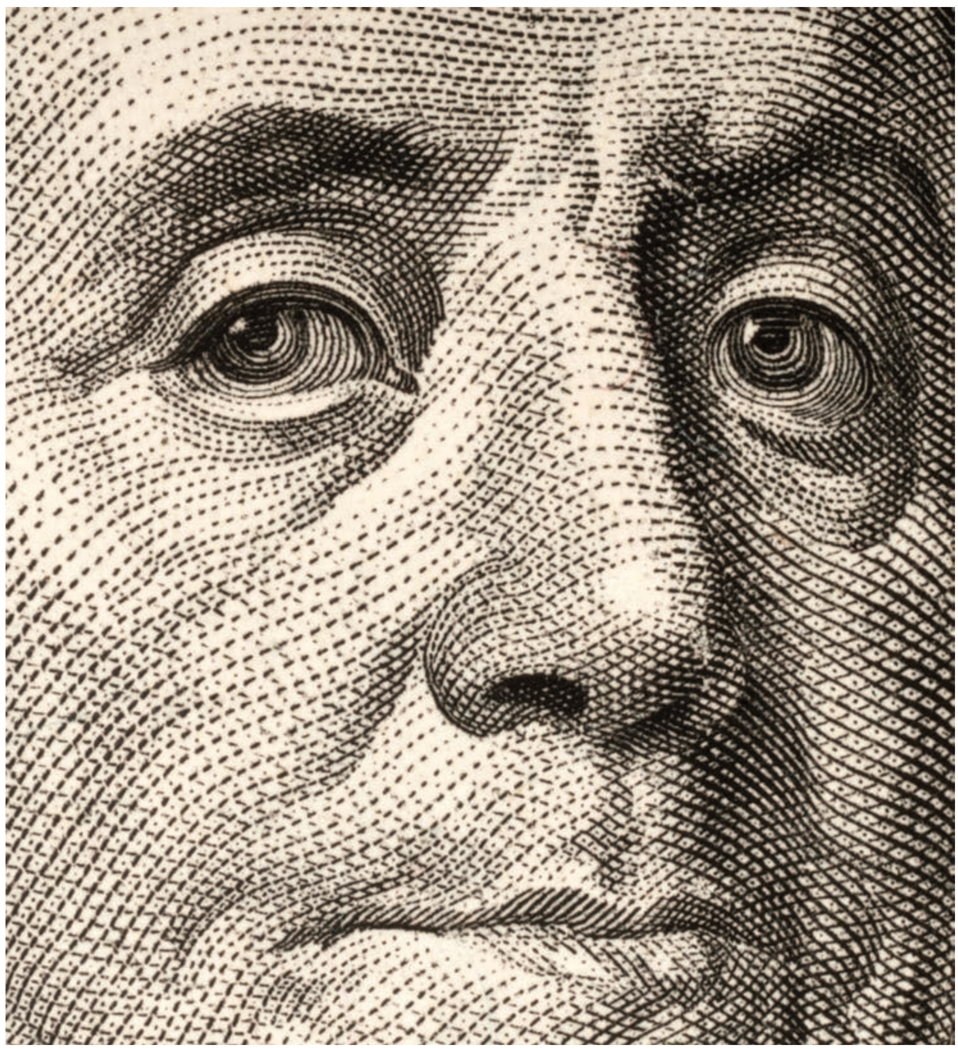
Remembrances of Times Past

One of my favorite quotes is by Mark Twain who said, “Travel is fatal to prejudice, bigotry, and narrow-mindedness, and many of our people need it sorely on these accounts. Broad, wholesome, charitable views of men and things cannot be acquired by vegetating in one little corner all one’s lifetime.” I am fortunate and grateful indeed to have shared cultural experiences and qualitative guidance all around the world. The more you give, the more you get.

By Kenneth Malc, CPA
Malc & Company
Great Neck, NY
kmalc@malcco.com

What the Tax Reform Act of 2018
Could Mean for You, as a Small Business Owner in the US

As a QRC and small business owner, you're probably wondering what the new tax reform act of 2018 might mean for you. Following are some tips from Kenneth Malc, CPA, partner of Malc & Company, who has been in business for over 30 years.



Deductible business expenses help entrepreneurs with many of the costs of running a business. Business owners know that most expenditures can be written off, although there may be limits and timing issues. So what are the most common tax deductions for small business?

Deductible Business Expenses

Determine which of these twenty tax deductions for small business you can take on your 2018 businesses return. Also, project which items you need to take into account for 2019 estimated taxes.

Here is a roundup of the most common tax deductions that were claimed on Schedule C of Form 1040 by sole proprietors (including independent contractors and one-member limited liability companies not reporting elsewhere) as determined by the dollar amounts, starting with the largest category. **This list has been updated for the 2018/2019 tax season.**

Top Tax Deductions for Small Business

1. Car and truck expenses. Most small businesses use a vehicle, such as a car, light truck, or van. The cost of operating the vehicle for business is deductible only if there are required records to prove business usage. In deducting costs, the need to keep records of cost (e.g., gasoline, oil changes) is eliminated if you rely on the IRS standard mileage rate of 54.5 cents per mile in 2018 instead of deducting your actual outlays. You can use the standard mileage rate whether you own or lease the vehicle.

2. Salaries and wages. Payments to employees (including salaries, wages, bonuses, commissions, and taxable fringe benefits) are deductible business expenses for the business. (For employee benefit programs, such as retirement plan contributions, see item 19.) Of course, payments to sole proprietors, partners, and LLC members are not wages (i.e., they are not deductible business expenses) because these owners aren't employees.

3. Contract labor. Many small businesses use freelancers or independent contractors to meet their labor needs. The cost of such contract labor is deductible. Be sure to issue Form 1099-MISC to any such contractor receiving $600 or more from you in the year (if payment is made to the contractor via credit card or PayPal, it's up to the processor to issue them Form 1099-K, but you may want to send your own 1099-MISC for personal protection).

4. Supplies. The cost of items used in a business (e.g., cleaning supplies for a cleaning service) as well as postage are fully deductible business expenses. Also, if you opt to use a de minimis safe harbor allowing you to deduct the cost of tangible property (e.g., tablets, vacuum cleaners) rather than depreciating them, the items are treated as non-incidental materials and supplies. They are deductible business expenses when purchased or furnished to customers, whichever is later.

5. Depreciation. This deduction is an allowance for the cost of buying property for your business. It includes the Section 179 deduction for equipment purchases up to a dollar limit ($510,000 in 2017; $1 million in 2018). Certain other limits also apply. The depreciation category also includes a bonus depreciation allowance, which is another type of write-off in the year costs are paid or incurred. The limit is 50% for property acquired and placed in service through September 26, 2017, and 100% for property acquired and placed in service after September 27, 2017.

6. Rent on business property. The cost of renting space—an office, boutique, storefront, factory, or other type of facility—is fully deductible.

7. Utilities. Electricity for your facility is fully deductible. Other utility costs include your mobile phone charges. If you claim a home office deduction and have a landline, the cost of the first landline to your home is not deductible. If you have a second line, it is a deductible utility cost.

8. Taxes. You can deduct licenses, regulatory fees, and taxes on real estate and personal property. Your employer taxes, including the employer share of FICA, FUTA, and state unemployment taxes, are fully deductible business expenses. However, for self-employed business owners, the deduction for half of your self-employment tax is not a business deduction; it is an adjustment to gross income on your personal income tax return. And owners of pass-through entities cannot treat their state and local income taxes on business income as a business write-off. These are personal taxes deductible only on Schedule A of Form 1040 (and for 2018 through 2025, are subject to a $10,000 cap for all state and local taxes).

9. Insurance. The costs of your business owner's policy, malpractice coverage, flood insurance, cyber liability coverage, and business continuation insurance are all fully deductible. However, there are two rules to note for health coverage. A small business may qualify to claim a tax credit for up to 50% of the premiums paid for employees (a better tax break than a deduction). Also, the cost of health coverage for self-employed individuals and more-than-2% S corporation shareholders is not a business deduction. Instead, the premiums are deducted on the owner's personal tax return.

● **10. Repairs.** The cost of ordinary repairs and maintenance are fully deductible, while costs that add to the property's value are usually capitalized and recovered through depreciation. However, there are various safe harbor rules that allow for an immediate deduction in any event.

● **11. Commissions and fees.** They are fully deductible and may require you to report them on Form 1099-MISC (see item 3). However, commissions paid in connection with buying realty are not deductible; they are added to the basis of the property and usually are recovered through depreciation.

● **12. Travel.** If you or staff members travel out of town on business, the cost of transportation (e.g., airfare) and lodging is fully deductible. You must meet substantiation requirements explained in IRS Publication 463 to claim any travel deduction. However, local commuting costs usually are nondeductible.

● **13. Advertising.** Ordinary advertising costs are fully deductible.

● **14. Home office.** A portion of personal expenses of a home are deductible as a business expense if the home is used regularly and exclusively as the principal place of business, a place to meet or deal with clients or customers, or as a separate structure used in the business. The deduction includes both direct costs (e.g., painting a home office) and indirect costs (e.g., the percentage of rent or mortgage interest and real estate taxes that reflect the percentage of business use of the residence).

● **15. Legal and professional fees.** Legal and accounting fees are fully deductible.

● **16. Meals and entertainment.** These costs are deductible business expenses only up to 50%, although some meal costs are fully deductible. Thus, a business lunch is half on you and half on Uncle Sam. And the deduction can only be claimed if you substantiate the expense (see IRS Publication 463). Starting in 2018, no deduction can be claimed for entertainment costs.

● **17. Rent on machinery and equipment.** Fees paid to lease or rent items used in your business are fully deductible.

● **18. Interest on business indebtedness.** Interest on loans that the business takes usually is fully deductible as a business expense (e.g., interest on a line of credit used in a construction business). However, starting in 2018, businesses with average annual gross receipts in the three prior years of more than $25 million are limited in the percentage of interest that's deductible. And interest on loans by owners to buy their businesses are treated differently. Distinguish business interest from an owner's investment interest or passive activity interest, which is not a business deduction.

For example, an individual who takes a personal loan to buy shares in an S corporation must allocate the debt proceeds to the business assets. If the assets are all used in the business, then the owner's interest is deductible business interest. If some assets are investments, then a portion of the interest is investment interest, which is a personal deduction limited to the extent of net investment income. If some assets relate to a passive activity, such as rental realty, the allocable interest is passive activity interest subject to the passive activity loss limitation.

● **19. Employee benefit programs and qualified retirement plans.** The cost of employee benefit programs, such as education assistance and dependent care assistance, as well as contributions to employees' qualified retirement plan accounts, is deductible. For self-employed individuals, contributions to their own qualified retirement plan accounts are personal deductions claimed on Form 1040.

● **20. Mortgage interest.** Businesses that own realty can fully deduct mortgage interest. Unlike interest on a personal residence, there is no cap on the size of loans on which interest can be claimed.

Make sure to discuss your situation with your CPA or other tax advisors to make sure you have done all that is required to qualify for a specific deduction. See which ones apply to your 2018 tax return and think about which may impact your 2019 tax year for purposes of estimating taxes and business planning.

New Deduction for Pass-Through Entities

Starting in 2018, there is a new deduction for owners of pass-through entities, such as sole proprietors or partnerships. The deduction is not a business write-off, but will help to lower the effective tax rate paid on business profits on owners' personal returns. The deduction is 20% of qualified business income. But there are many limits that may restrict or bar eligibility to claim any write-off.

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JOE COUGHLIN
of the MIT AgeLab on Product Development for Older Adults

By Kay Corry Aubrey
User Researcher · Usability Resources Inc. · Bedford, MA · kay@usabilityresources.net

Joseph Coughlin is the founder and director of the AgeLab at the Massachusetts Institute of Technology. Joe and his team study the impact of global demographic change and technology trends on consumer behavior, business innovation and public policy. The *Wall Street Journal* named Joe one of "12 pioneers inventing the future of retirement."

I talked with Joe recently about the AgeLab and about his new book, *The Longevity Economy: Unlocking the World's Fastest-Growing, Most Misunderstood Market,* where he describes how businesses can create a new narrative for old age.

Kay: *Let's get started by talking a little bit about what the AgeLab is and its mission.*

Joe: The AgeLab is a multidisciplinary program at MIT that's based in the School of Engineering but draws from the Schools of Architecture and Planning to really understand how we can invent Life Tomorrow and to solve what I call the longevity paradox. And the paradox is this: perhaps the greatest success of humankind is living longer, but now the challenge is what do we do with the time that we have and the time that we continue to gain. The AgeLab is trying to develop new ideas, new products, new services, new approaches to understanding and developing Life Tomorrow.

Kay: *What kinds of products and services have you created so far?*

Joe: We started with the auto industry to learn how can we use new technologies in the car, in transit and other things to enable people to stay mobile, safe, and seamlessly secure throughout their lifespan. As we move to the autonomous car, we have started to redesign the interfaces of the cars that are out today so that people can learn, use, and eventually trust and adopt new technologies that will be used by 20-year-olds and by 80+ year-olds as well.

We've worked with the insurance industry to come up with new product riders to improve homeowner insurance to keep older people safe and secure, and making it possible for them to age in place. We've worked with retailers to rethink the design and the layout of their stores, not just to be age friendly but also to make it a better consumer experience. Because if I make it better for an older adult, removing that friction and frustration and that fatigue that older adults are not particularly fond of, guess what, I've made it more attractive for every consumer out there.

So, our work is across transportation and retail and housing and health, and we're having great fun with a great team.

Kay: *How do you do qualitative research at the AgeLab?*

Joe: One of the fun things about a multidisciplinary team is you have

It's often qualitative insight that makes the difference between understanding what's simply a correlation and what's a causation.

many different disciplines, like engineering and planners, gerontologists and social workers looking at the same problem. If you ask them what the problem is, they will all use a different language. That richness—and shall we say creative conflict—between the disciplines in the lab gives us the ability to develop new insights and new language, to come up with very creative and innovative ways to rethink a product, to rethink an experience and the like.

There is a growing divide out there between quantitative research and qualitative research. Every sentence these days has to be ended with the phrase "big data." My challenge to big data advocates is the following: Data, data everywhere, and not a drop of knowledge. We use qualitative research to bring insight to big data. We are the third-largest data storer on campus at MIT, and that says something, so it's not that I'm discounting big data. But now the divide between quantitative and qualitative needs to be bridged. It's often qualitative insight that makes the difference between understanding what's simply a correlation and what's a causation.

Kay: *So you facilitate many different professional perspectives and blend them with insight from real users.*

Joe: Today about 70 feet down the hall from where I stand are our lifestyle leaders, our 85+ panel is here. There's close to 30 people over age 85 that are more affluent, highly educated, a highly biased sample of 85- to 99-year-olds. One of our gentlemen turns 99 this month. If a product or service does not work for them, it's probably not going to work for anyone. The way that we harmonize these very different approaches, the different languages and different methods, is by the one thing we have in common—it's the user.

It's not just about responding to the consumer; it's about understanding their needs, their wants. Transcendent design, unlike universal design or design thinking (which we used to just call thinking) is about how we excite and delight. How do we come up with new ways of doing things that the consumer didn't even know that they wanted until you do it for them? Real innovation, real quality engineering, real experience is about surpassing what they thought they needed to give them something that they now want more than anything else.

Kay: *It's a transcendent leap of imagination!*

Joe: I think it's a bit of imagination, but it's also drawing upon the real skills of qualitative insight, trying to understand where the emotion is, what is the basis of what people or a user or a caregiver is doing. If it's communication, how do we make the communication richer? How do we make it better? How do we make the conversation in that connection be more than pill reminder systems and "Help, I've fallen and I can't get up"? The basis is basic human behavior. It's communication.

But we try to jump at the next step, which says, okay, if I am going to develop a pill reminder system, let's dovetail it with something that we know that people really want, not just the adult daughter or a grandchild calling grandma saying, "hey, did you take your

meds?" but actually giving an opportunity for the grandchild to say, "hey, grandma, I had soccer practice today," and, oh by the way, the system is also going to say, "did you take your meds?" So, not being so profoundly rational that we leave the consumer's emotions behind.

Kay: *In your book* The Longevity Economy, *you say businesses that create products for older people should study "the Lead User". Who is the Lead User?*

Joe: This is where your listeners and readers who are men can go out and make a sandwich or maybe a good strong drink. As we see it here in the lab, the Lead User, and the real innovator in the new longevity economy, is a woman. More likely than not it's a 47 to 57+ female. She understands the jobs of longevity long before most men do. She's not just a mother, she's also a caregiver, she's also working. She's the chief financial officer and chief purchasing officer of the house.

It's not biology that makes women that lead adopter and lead user in the longevity economy, it's the role. Whether they work or are a mother or the like, they are doing all the things and providing the supports, the information seeking, the research online, advising and specifying the medications, the money, the home improvement, not just for their house, and increasingly as they age, not just for the Millennial family house, but also she probably has more parents and in-laws than she ever planned on in addition to having children. And as a result, she tends to be the lead adopter.

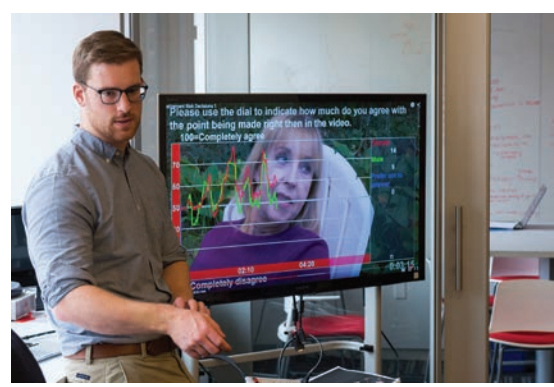
So, we track middle age and older women more than almost anyone else because they are the systems integrator and the innovator for the longevity economy. High touch is the number one competitor and the number one requirements definition we need for high tech.

Kay: *How do you find your study participants?*

Joe: We are very fortunate that the lab has one of the largest databases of people that we can bring in, upwards of 10,000 just in the region. We recruit them through ads in the paper and TV, depending on the experimental work, in specialized areas such as the Registry of Motor Vehicles or hospitals. Last year we ran upwards of 2,000 subjects through the lab and probably touched about another 25,000 people in five different countries around the world on everything from focus groups to surveys to deploying equipment to somewhere between cool and creepy, putting GPS on people and tracking entire households in India to understand not just mobility patterns but activity patterns.

Kay: *Are there industries that you think are doing a particularly good job of developing products for older people?*

Joe: The companies that do best are those that try to understand their consumer and often did not even know that they were designing for an older adult. The products that are designed for older adults are clunky, blue, beige, and have got numbers the size of my hand. As we like to say for the auto industry you can't build an old man's car, because a young man, and a young woman, won't buy it. But here's the punchline. An old man and an older woman will run far, further, and faster from it than even the younger cohort will.



(For example), Dyson is an incredible product. Not only is it usable, not only does it do the job, but it's also very light. It's easy to understand. It comes in bright colors. It does not say old man or old woman's vacuum. We're seeing little spots of innovation though not necessarily where you would expect them. The home-equity-loan-priced hairdryer that they make, for instance, is exceedingly light for that older woman who wants to dry her hair and be able to get her arm around the back of her head and up and around up high. So, that's a great example.

In terms of designing of spaces, I think that the work that we did with CVS is inspiring. No one knows that that store was made for an aging population, the aisles were wider and the shelves were lower and the signage was made high contrast, and now there's a place to put a purse at the cash register. And guess what, the mother with a child or the gentleman going through wanting to find something quickly now appreciates it because it was made age ready and so, therefore, it made it easier for all.

Kay: *I have one last question, and it's back to something you said in your book about how the sharing economy is being embraced by older people. Would you talk a little bit about that please?*

Joe: While the sharing economy—the Ubers, Blue Aprons, and essentially life on demand—appears to be designed and developed by the young Millennials, the older Boomers and the Silent Generation like it too because it provides easiness of use. It provides convenience. It's on demand. It's to the door.

What we have found in the lab, and we did a regional experiment here in the Boston area, finding that it may be cheaper for you to stay in your home aging in place using the vast variety of services that you could have brought to the door than going into assisted living or many of the aging services facilities and residences that are out there. What we're really excited about is that the convergence of the Internet of things and the sharing economy is transforming the home as a place into a platform for services that will make it connected and convenient for the young, but also provide care both for the caregiver and the care recipient.

Kay: *All of this innovation is being driven by older people because we are now such a large part of the economy.*

Joe: Yeah. As I write in the book *The Longevity Economy,* it's the new old age. [Those who are] 60+ alone are the third largest gross domestic product in the world. So, United States, China, and the 60+, and here in the United States the 50+ make up 70% of the buying power. This is not your grandfather's old age.

Kay: *Great. Thank you so much.*
Joe: Thank you. Take care now.

By Jen Dale
President and CEO
InsideHeads
St. John, VI USA
jdale@insideheads.com

ONLINE — OR — OFFLINE

FINDING THE SWEET SPOT

Technology has changed and expanded the ways we communicate. From snail mail to social media, today we can choose which senses to tap and how we want to exchange our thoughts and feelings. Online or offline, human communication adapts to the perceived needs of the situation.

Some of the most significant differences between online and in-person communication are the potential for anonymity and the depth and duration of feedback.

When we are face-to-face with someone, we are exposed and accountable. Our expressed opinions and reactions are affected when we look another in the eye. While in-person engagements include helpful visual expressions for the recipient like facial expressions and body language, online communication can free respondents from the tacit assumptions and gazes of others, encouraging candor and freedom of expression.

This online freedom of expression can be both a blessing and a curse. While the arts of bullying and self-promotion are rampant across social media, self-expression in a controlled research setting is markedly different.

Let's take a look at how online communication compares to face-to-face and how to determine which online research method works well given different objectives.

Custom Designing Studies

What once were two distinct qualitative research disciplines—online and in-person—are now two factors of many to consider when designing a research project. Objective, budget, location, interview length, study duration, group size, participant qualifications, means of communication, activities, and compensation all come together in the design.

Custom-designing studies may sound daunting, but the strategy is fairly straightforward: know where you're going and your options for getting there. In other words, understand which research designs will best achieve your objective within budget.

Figure 1. Consider design elements to determine which method will work best

Elements of Qual Research Design
- Client's Budget
- Location of Engagement
- Interview Length & Study Duration
- Group Size
- Participant Needs
- Means of Communication
- Activities
- Compensation

Choosing the Right Method

To determine which research method will work best, work backward from your research objective and consider the elements of design (see Figure 1).

For a qualitative researcher, the study objective is always due north. With a keen eye on the final destination, and ideally some understanding of the client's budget, we can determine what is needed and plan the most appropriate path forward.

Considering where you are going before you pack is an approach that is neither new nor revolutionary. Also known as "backward planning" among educators, "begin with the end in mind" is second on Stephen Covey's popular list of "Seven Habits."

Meeting your client's research objective is the goal—the big question your client needs answered so she can move forward. We start building our research design from here, because it is the only piece of the puzzle we usually have at this point.

Additionally, knowing what decisions your client will be making from the research results is a nice bit of information to have, especially early in the design development. When the project is over for you, the business mission continues for your client. Bridge the gap from research findings to actionable insights, and you're crossing the finish line a winner.

Engage to Deliver

The research objective and the client's budget help determine the best means of engagement. Each of five basic online qualitative approaches offers something different (see Figure 2).

- Online offers anonymity, prompting freedom of expression without the risk of others' judgmental gazes. Sensitive topics or shy respondents benefit from anonymous settings like bulletin boards and chat groups.
- In-person allows for facial expressions, body language, and tone of voice, offering the researcher multiple factors from which to gauge response.
- Real-time offers immediacy, giving the researcher instant feedback for analysis.
- Extended time studies allow for tracking thoughts and behaviors over multiple days.
- Groups offer a dynamic exchange of communication and reactions to ideas and expressions of others, while one-on-ones are more intimate.
- Text-only conversations allow for anonymous freedom of expression. Visibly fleeting communications, as in scrolling text in an online focus group, also can bolster feedback, as deep or divisive discussions are most effective when the communication lacks permanence and is not continually visible to participants.
- Audio allows participants to be heard, while audio/video adds a face, and thus some non-verbal communication, to the voice. Multi-media capabilities offer engagement choices.

Tools are the last piece of the research design puzzle. The increase in tech devices has led to an influx of tech applications, so if you are looking for a particular engagement in a particular format with a particular deliverable, you'll have no trouble finding several options. From

Figure 2. Each online qualitative approach offers something different

	Location	Participants	Timing	Means of Communication
IDI	Online	1	Real-time	Two-way audio or audio/video
IDI	In-Person	1	Real-time	Face to face
Chat Group	Online	12-20	Real-time	Two-way text, one-way multi-media
Chat Group	In-Person	6-10	Real-time	Face to face
Board	Online	12-20	Extended	Two-way, multi-media
Webcam Group	Online	3-5	Real-time	Two-way audio/video
Community	Online	50+	Extended	Two-way multi-media

paid to free, supported to risky, useful to useless, there's a feedback app for that. Try a quick search or QRCA members can post online at the QRCA Member Forum for some honest user feedback.

Look for tool features that will allow you to engage with your participants in the desired format. For example, if your client wants to receive long-form video testimonials from participants, you'll want a tool that can at least accommodate large video files and ideally includes an editing tool or services.

Example 1: Product Usability

A small but mighty technology company has developed new software to manage physical inventory across multiple warehouse locations. The developers have tested it internally to work out the bugs and now want feedback from real customers in different industries across the country. Insights collected will determine the final design before launching the product.

With product usability as the research objective, timing of the essence, and potential respondents all over the map, the project needs a research method that allows for observation of the experience, data collection in real and extended time, and geographic dispersion of participants. And, since each user will be using the software for several months within their own industry, we can assume they will be on different schedules and have unique experiences.

The ideal solution in this scenario is virtual, one-on-one, with two-way audio/video communication: online IDI with screenshare. To accomplish this, tools like WebEx, Join.me, GoToMeeting, and Zoom work well. Choose the one that best fits your deliverable needs (e.g., written report, video testimonials).

Example 2: New Concept Development

A New Jersey landscaping company wants to expand its services. The company currently operates in the northeast region of the state and believes its best strategy for growth is to offer more services to existing clients, as opposed to obtaining new customers by broadening the coverage area. Ultimately, the company seeks to increase sales.

The stated research objective is to identify which potential home services are of greatest interest to current customers. Because potential respondents all live within a half hour of the region center, an in-person engagement, in real-time, sounds logical. Since group discussions (vs. one on one) foster a more dynamic exchange of ideas, in-person focus groups are an obvious choice.

To identify the best qualitative research method in this situation, however, consider other study elements, like budget, privacy, final deliverable, and compensation.

If your client doesn't have enough money for in-person groups, online chats are a comparable option. Online focus groups can lower project costs by reducing the total number of groups conducted, eliminating the added cost of transcripts, and reducing the total labor hours expended. By accommodating more participants (all geographically dispersed), eliminating moderator travel, and producing instant transcripts, online focus groups can collect more feedback in less time. In addition, respondents could be more forthcoming with their opinions if they are not surrounded by the watchful eyes of neighbors, so a virtual option could have methodological advantages as well.

Go deeper by asking customers to submit videos or pictures of desired home services. Engage participants in an asynchronous, multi-media bulletin board environment, or consider adding projective exercises or homework activities to an in-person group for richer insight.

In Summary

The path from research objective to best methodology may not be straight, but we can cross the finish line a winner with our client by consistently referencing the end goal in the design process, identifying what's needed to deliver it, and considering the factors that could affect it.

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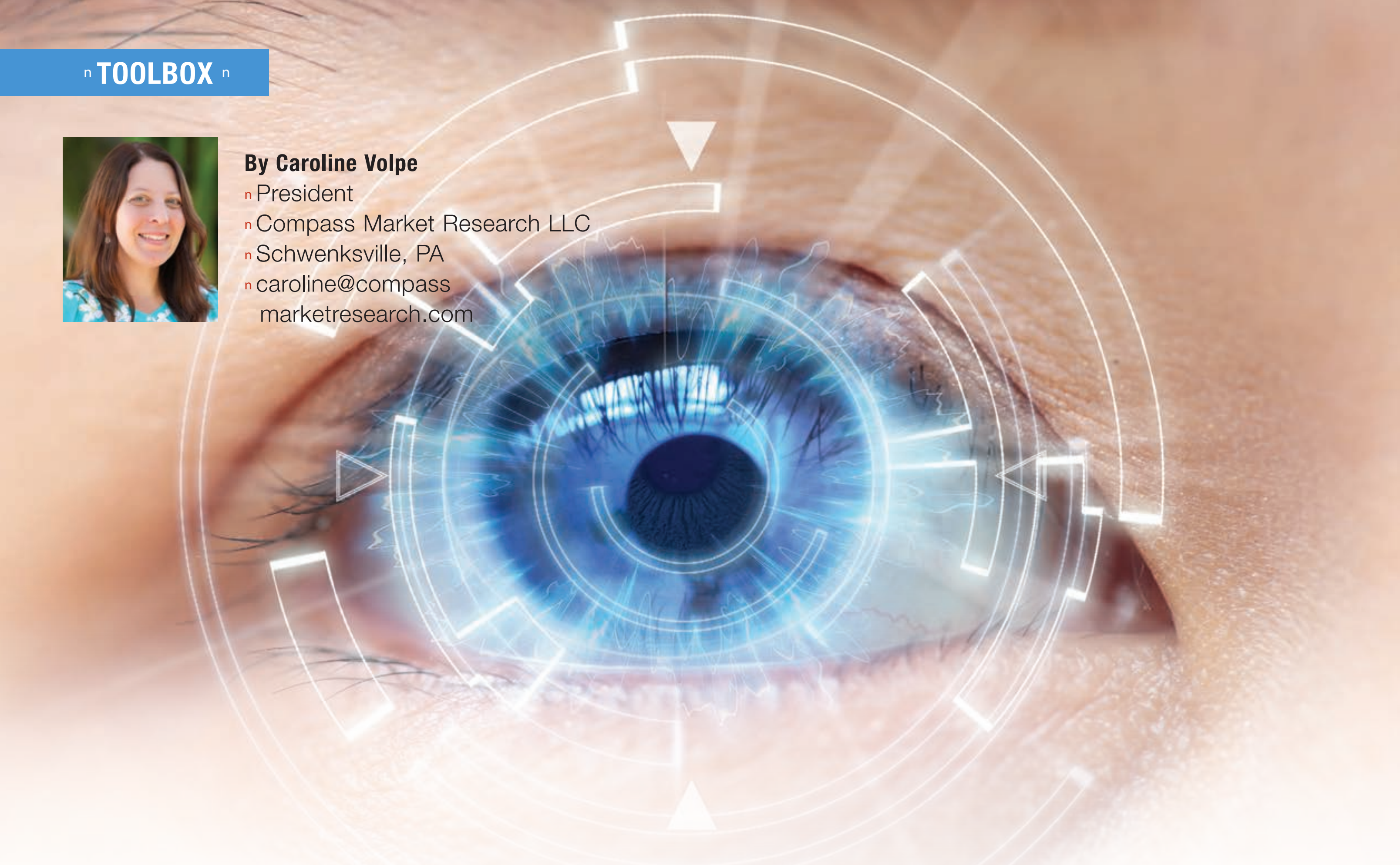


By Caroline Volpe
President
Compass Market Research LLC
Schwenksville, PA
caroline@compassmarketresearch.com

IN THEIR EYES:

HOW UNDERSTANDING RESPONDENT PERCEPTIONS CAN HELP IMPROVE THE RESEARCH PROCESS

Have you ever wondered what participants think of the qualitative research process? I did. When curiosity overwhelmed me, I undertook primary research to uncover what individuals who had participated in any type of qualitative research in the past year thought of the process, from the initial recruitment contact to payment of honoraria. We partnered with M3 USA Corporation on this research effort. The goal was to see what could be done differently to improve research quality and ensure that participants have a good experience.

What Was Done?

Two phases of research were executed. The first phase was a qualitative bulletin board with 15 physicians and 13 patients from the US, UK and France. It was a single board conducted in English. (Thank you very much to my French participants!) The second phase was a 20-minute quantitative, native-language survey that was designed based on additional qualitative research conducted in Brazil, France, UK and the US with physicians and patients as well as with physicians in China.

It is important for qualitative researchers to remember the total participant experience as we juggle the various pressures put on us when designing research, including timelines and budget. Be an advocate for respondents, because without them there is no research.

To participate in the research, respondents needed to have participated in at least two qualitative research studies in the past year. These studies could have been IDIs (in-depth interviews), focus groups, TDIs (telephone depth interviews), mobile and/or bulletin board-based research.

To acknowledge, I focus on health care research, so the participants are physicians and patients. However, in talking to colleagues that work in B2B and health care, they have told me that the physicians essentially behave much like B2B respondents. And, at the end of the day, patients are consumers. So, I firmly believe that these learnings extend well beyond health care research.

What Do Respondents Want?

This research demonstrated that respondents want four key things from researchers:

1. To know what the heck is going on
2. To be respected
3. To be comfortable
4. To be rewarded

1. To know what the heck is going on. Participants want to understand the "what" at every stage of the process.

During recruitment, beyond knowing the type of research it will be, participants also want to know where it will take place, at what time and what the honorarium is. Plus, they want to know: What is the research all about? This is where we often fall short of expectations.

QRCs tend to avoid providing too many details about the "what" because we are concerned about individuals cheating the screener or biasing invited participants. However, the "what" can play a significant role in respondents' decision to respond to the invitation. They want to know that they are going to be useful and valuable contributors to the research. Therefore, respondents who could potentially be valuable contributors may not respond to the invitation without knowing more about the "what".

It is also perceived that researchers are being vague on purpose as they know that there are certain types of research that individuals do not like to participate in.

"Occasionally the information regarding the research topic is vague. **A bit more detail would allow us to decide if we are able to provide a good, informed opinion."**
- Physician

While providing more details in the invitation may be challenging, we could try to be a little more creative and a little less vague. But, more importantly, once the participant has been screened in, why can we not satisfy their curiosity and provide more robust information about the research in the final invitation? There are ways to not bias the respondent for the fieldwork while making them excited to participate.

During fieldwork, they want to understand the objectives of the research and what decisions will be made based on the research. They want to understand this because they want to be helpful. There may be times we cannot provide the details at the start of the interview as we do not want to bias the respondent, but we could provide them more insight into what we are trying to achieve as the interview progresses. I have incorporated more robust introductions or release of information during the interview, and I have found that respondents seem more engaged and the insights are richer for it.

They also want to understand the objectives to help them understand why we are asking the questions we are asking. While it is a moderating technique to ask questions from a variety of angles, respondents pick up on this, and they do not always know what else we are looking for. This leaves them frustrated and feeling that they are not giving us what we want. I have become even more conscious of this during my interviews and try to avoid it.

"Talking about the same thing for too long gets boring and you lose interest. Plus, after what you say, if they keep asking you to extend and what else, what else, **you start making things up just to get them to stop asking you."**
- Consumer

"Sometimes there is only so much you can say about a particular question, but often the interviewer wants more… it becomes very repetitive and we seem to be going round in circles. **No agenda had been set out and, if it had, maybe I would have been able to elaborate."**
- Physician

They also are confused by projective techniques; they do not understand what we could possibly be getting out of them, particularly the professional audiences. But, I know I have found them valuable, even with physicians. To address this, I have begun offering a quick analytic synopsis of the exercise. It takes me no more than 30 seconds to quickly summarize what I have learned from the exercise, but it also gets the respondent's buy-in to the exercise that was just done—we really did learn something from it.

At the end of the research, they want to know what happens next and, specifically, when they will receive their honoraria. I admit that I did not always know that answer as my fieldwork partners pay the respondents on my behalf. I now make more of an effort to know this and to pre-emptively tell them at the end of the interview. They find it irritating and embarrassing when they must track down their honoraria.

2. To be Respected. Key to this is that they want their time respected. This is a multi-fold issue:

- Screeners are getting longer. As such, the screening process takes longer, particularly since respondents go through the process multiple times for verification purposes.
- Technology may result in additional time spent by the respondent (e.g., needing to do a technology check in advance of the interview or to log on in advance for a webcam interview).
- The interview itself may take longer than originally scheduled.

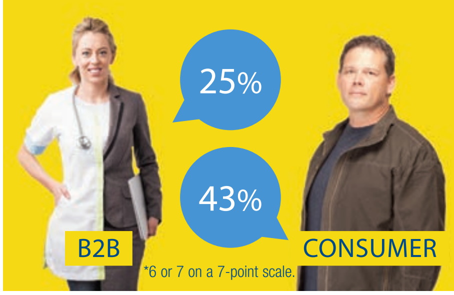
The onus is on researchers to manage time expectations, which can be done by strictly enforcing the idea that screeners only include questions that terminate unqualified respondents or that place respondents into quotas. Any questions that are information only should be captured in a different manner. There may come a time when we need to compensate participants to complete screeners above a certain length. In fact, some fieldwork agencies are already implementing this strategy.

We can provide better time estimates for the total commitment to the project, including time for any prep or technology checks.

Finally, continuing to push back on clients when the discussion guide is becoming unmanageable for the planned interview length is something we need to do. Some in the insights departments of pharmaceutical and biotech firms whom I have spoken with acknowledge that their marketing teams try to accomplish too much in a single study. They recognize the need to educate their teams on what can reasonably be done in a qualitative research study.

EXHIBIT 1

Percentage of respondents who agreed* that **"I often participate in research that exceeds the amount of time that I was told I would be spending on the research."**



*6 or 7 on a 7-point scale.

"[I don't like it when] my time is not respected and the group or interview runs over. Having to excuse yourself is embarrassing and it should always start and end on time."
- Consumer

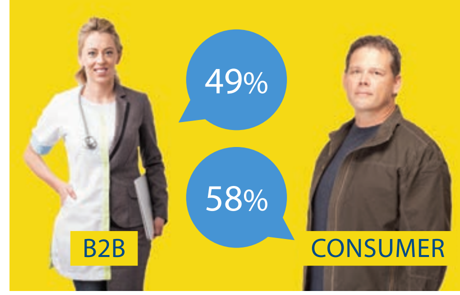
"What I don't like is that someone calls 10-15 minutes [beforehand] to test the system and to connect me as I have already tested the system and I know how to connect."
- Physician

Respondents, particularly consumers, also want to be listened to and engaged with. As the screening process becomes more automated, while efficient, it is dehumanizing the process. And, during the interviews, individuals, particularly consumers, spoke about instances where they felt that the interview was too "formulaic" or that the moderator was "patronizing".

3. To Feel Comfortable. Respondents spoke of being prompted to answer screening questions in a specific way, which made them uncomfortable. They even noted that it seemed "unethical" to them. We know that fieldwork agencies are already aware of this issue and work to avoid it, but there is still more to be done.

EXHIBIT 2

Percentage of respondents who said that they have been guided by the recruiter to **"answer in a certain way to ensure that you will be eligible for the qualitative market research study."**



As we use more and more technology as part of the research process, we need to make sure that the respondents are comfortable with the technology and receive the instructions needed to successfully complete the research.

"My worst experience was being escorted out of Home Depot because as part of my video I included a Home Depot clerk who wasn't at all happy. They wanted to take my video card and I told them this wasn't Russia."
- Consumer

"The technical side of things did not go well…I emailed, called and sent a message via the Google link to say I was there but having trouble. It took them so long to reply that I felt forgotten and unsupported and almost walked away."
- Consumer

The moderator must be cautious that he or she is not causing the respondent discomfort by:

- Seeming disappointed in the respondent's answers.
- Asking what appears to be leading questions.
- Not managing group discussion/letting a respondent dominate.
- Not knowing the lingo for a technical category.

"It was a study about chocolate mousse yogurts. The container was made of glass and looked more sophisticated than usual ones. I said that because it didn't look like a cheap quality I could easily serve those to guests as deserts and he said really? Not sure he wanted to be invited over."
- Consumer

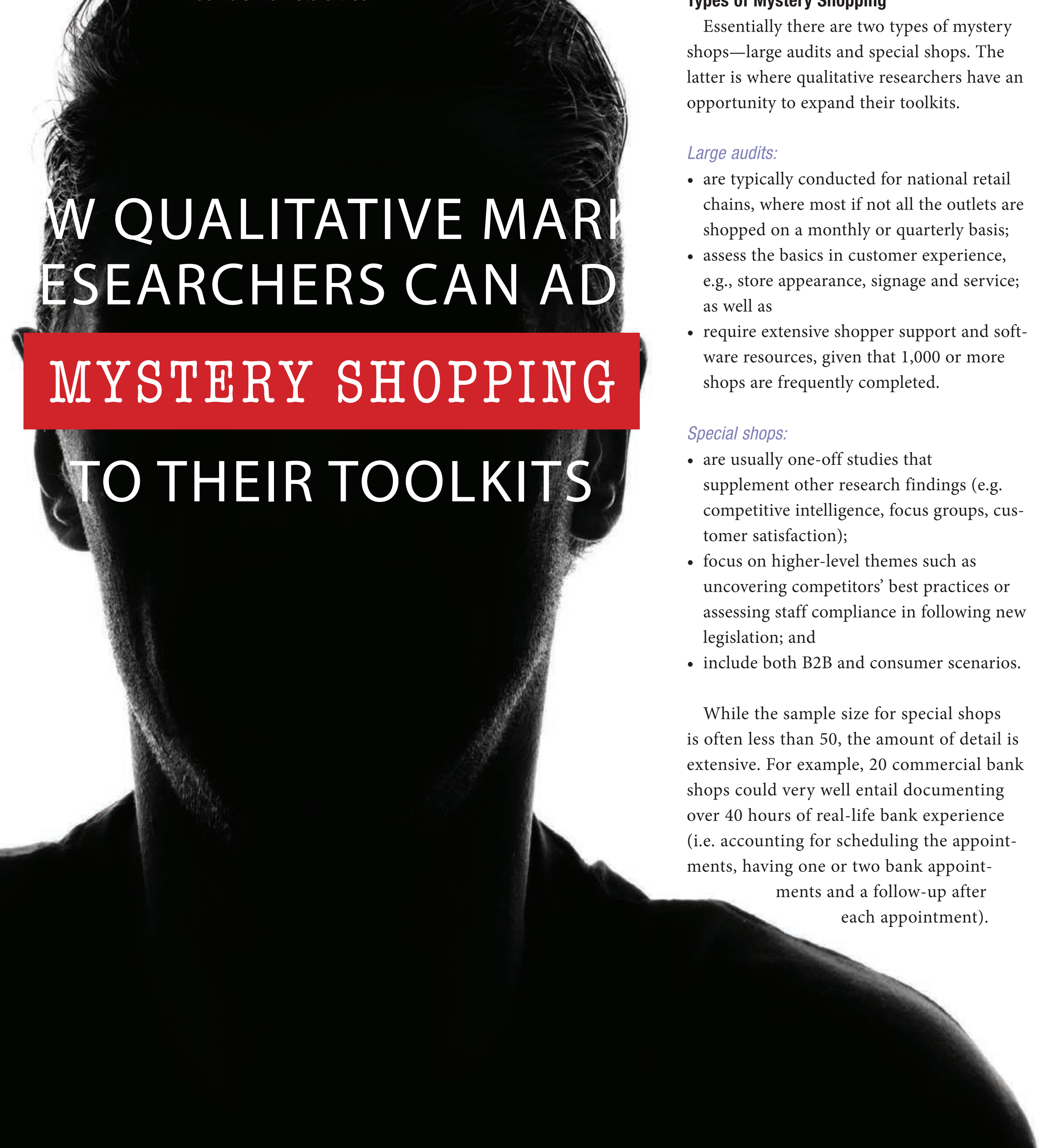
4. To be Rewarded. An honorarium is the biggest driver to participation for both professionals and consumers, according to the research we conducted. However, participants find that getting paid, when the research is not in-person, can take up to three weeks for consumers or up to five weeks for professionals. Both groups would prefer to receive payment, on average, within two weeks.

When assessing whether the honorarium is sufficient, in-person participants factor more than the time in the front room. They also add in ancillary factors such as transportation costs, babysitters, travel time, preparation time and waiting room time.

Final Thoughts

What respondents want from researchers may seem obvious; they want to be viewed as valuable members of the research team and to be treated as such. And, they are valuable. It is important for qualitative researchers to remember the total participant experience as we juggle the various pressures put on us when designing research, including timelines and budget. Be an advocate for respondents, because without them there is no research.

By David Lithwick
Principal
Market Alert Limited
Toronto, Canada
david@marketalert.ca



W QUALITATIVE MARK ESEARCHERS CAN AD MYSTERY SHOPPING TO THEIR TOOLKITS

What Is Mystery Shopping?

In simple terms, mystery shopping is feedback from shoppers of their experience interacting with a company's contact centre representatives, sales reps, and other front-line staff.

Types of Mystery Shopping

Essentially there are two types of mystery shops—large audits and special shops. The latter is where qualitative researchers have an opportunity to expand their toolkits.

Large audits:

- are typically conducted for national retail chains, where most if not all the outlets are shopped on a monthly or quarterly basis;
- assess the basics in customer experience, e.g., store appearance, signage and service; as well as
- require extensive shopper support and software resources, given that 1,000 or more shops are frequently completed.

Special shops:

- are usually one-off studies that supplement other research findings (e.g. competitive intelligence, focus groups, customer satisfaction);
- focus on higher-level themes such as uncovering competitors' best practices or assessing staff compliance in following new legislation; and
- include both B2B and consumer scenarios.

While the sample size for special shops is often less than 50, the amount of detail is extensive. For example, 20 commercial bank shops could very well entail documenting over 40 hours of real-life bank experience (i.e. accounting for scheduling the appointments, having one or two bank appointments and a follow-up after each appointment).

Examples of scenarios falling under special shops are:

- a telecom wanting to see what other incentives competitors are offering smartphone buyers besides those listed on websites;
- a dog food company needing evidence to support why complaint resolution has been rated poorly by customers; and
- a car manufacturer having to determine whether increasing point of sale support for their dealers will offset recent sales erosion.

Hence special shops are a higher level of mystery shopping that requires the skills and experience of a market researcher or analyst to deliver the needed critical analysis, interpretation and recommendations. A vendor of large audits simply will not cut it.

Mini Case Example of How a Qualitative Project Might Evolve into a Special Shop

You recently completed a focus group to gain insights on how your bank client can speed up migrating customers from branch banking to digital. One issue that kept being raised by participants was the frequent lack of interest by branch staff to walk customers through the mobile app when a customer asks for help. What better way to get clarity of this issue than to conduct a mystery shop by assessing five client branches and five competitor branches?

To do this, recruit four colleagues. Including yourself, this would work out to each researcher doing two shops. One shop would be as an actual customer of one bank and the other as a potential customer of another bank.

Assume you would need to pay each shopper for their efforts. For example, a simple shop might involve presenting as a walk-in customer inquiring about mortgages, while a more complicated shop might involve actually signing up for a line of credit. In the case of the mobile bank shop, paying a smaller fee per shop may suffice because it would simply involve walking into the bank and asking how to use the bank's mobile app.

Mini Case: Mystery Shop Survey

A simple template to follow for putting together a survey appears below. Essentially the survey needs to capture most of the information with a "Yes" or "No" answer. Specific rationales include: Answering "Yes" or "No" forces the shopper to make a choice, rather than rating an item on a scale of 1 to 10. Second, you are asking the shopper to feed back a lot of information and to remember this while doing their shops. So you want to make it easy and intuitive for the shoppers when answering questions. Third, for those who are familiar with Excel, "Yes" answers can be tabulated each as "1" and "No" answers each as "0", so it is a simple matter of totaling the number of "Yes" answers to get an overall score. For example, the total number of "Yes" answers out of a possible 15 questions questions for 1 representative was 12, so they rated 80% (12/15), arguably a good performance, whereas in another survey the total number of "Yes" answers for a representative was 3/15 or 20%, a very poor performance. Excel also has an easy charting feature which provides a quick visual record that is useful in the analysis discussed later.

Mystery Shop Survey

Did the Rep Explain how to:

• View your account balances?	n Yes	n No
• Make a payment?	n Yes	n No
• Send an e-transfer?	n Yes	n No
• Deposit a cheque by taking a picture?	n Yes	n No

Did the Rep Cite Advantages of Mobile Banking such as:

• Bank wherever you want?	n Yes	n No
• Easy to do?	n Yes	n No
• Can make a branch appointment in real time?	n Yes	n No
• Can search for nearby branches?	n Yes	n No

Did the Rep:

• Encourage you to try the app while you were with them?	n Yes	n No
• Relate their own experience using the app?	n Yes	n No
• Provide suggestions (e.g. have a strong password, avoid Wi-Fi when using app)	n Yes	n No
• Ask if they answered all your questions?	n Yes	n No

Net Impressions

- What impressed you by how you were helped?
- What did you dislike?
- Based on your shop, what can you suggest to improve the branch efforts to explain the bank's mobile app?

The survey also allows for shoppers to provide subjective comments (under "Net Impressions"). Here you can ask such questions as: "If this were a real situation, would you purchase the product based on your shop experience? Why/why not?"

Making Sense of the Data

Editing the surveys is absolutely critical because the shopper's credibility is at stake. Scrutinize their responses carefully. Use common sense to flag any response that does not sound right. For example, conflicting information, lack of detail and rushed responses are flaws I frequently find.

Conflicting Information

In this case, one response conflicts with another. For example, the shopper indicating a "yes" to the question, "Did the rep cite any advantages of their bank's mobile app?", comments later in the survey that the rep made no effort to promote the mobile app. Here, email the shopper and confirm answers to the questions where responses conflict. (NOTE: permission for any needed follow-up is secured during the screening process.)

Lacking Detail

The shopper answers the question, "Do you have any suggestions on how the rep can improve their sales delivery?" simply with "try harder," instead of noting specific suggestions about what the representative needs to do, like: make an effort to walk the customer through the app. When this happens, contact the respondent and ask for examples that illustrate the written response.

Rushing Survey

The shopper answers "Yes" to every question or writes identical comments for questions asking, "please comment". In this case, phone the respondent and go through every survey question to make sure to capture accurate and detailed information.

> "The rep said that while you can transfer funds from one account to another, there is a daily limit. However, he was not sure what the limit is or bothered to find out."

When reporting, cite shopper comments that point to either very positive or very negative experiences. I look for comments that I can incorporate into a SWOT analysis. Each comment I pull reflects either a strength, weakness, opportunity, or a threat. And, I limit the number of comments to twenty (to avoid overloading the reader), using a call-out for each comment.

Once the data are tabulated and comments extracted, the analysis takes place. This is the easiest part of the assignment, given that you already have the comments as well as charts from which to draw insights.

Example Findings

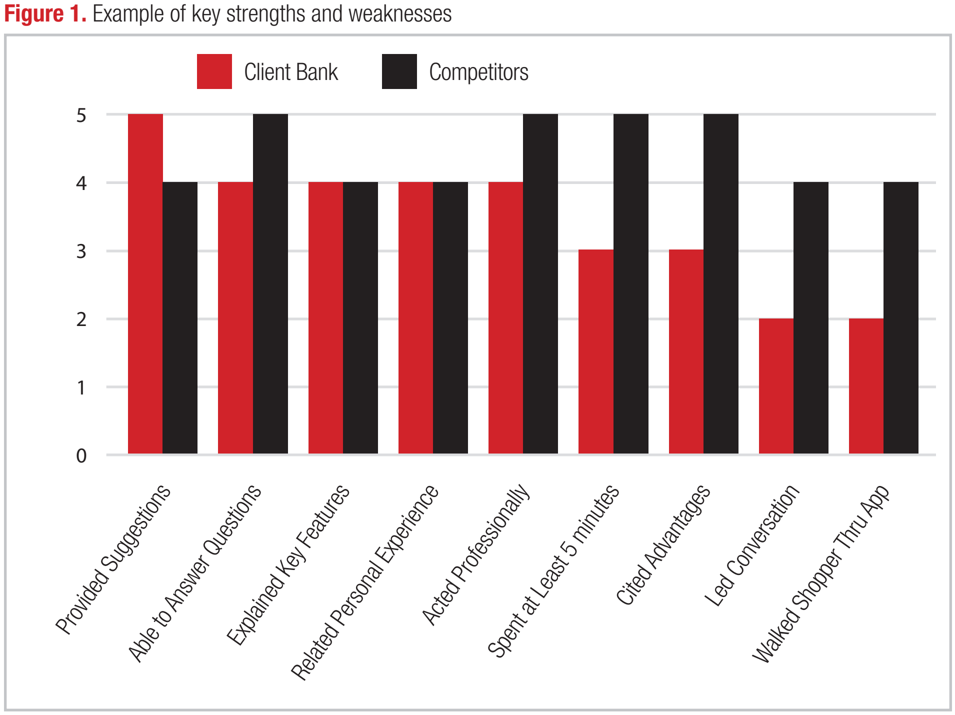
Figure 1 is an example of what might appear on a slide highlighting key strengths and weaknesses of the client bank's branch staff efforts:

Key Strengths/Weaknesses

- Most Client Bank reps provided suggestions (e.g. avoid using app in public Wi-Fi), answered questions, explained features (e.g. deposit cheques, transfers), related their own experiences using the app, and acted professionally.

  However, just two out of six reps led the conversation or walked the shopper though the client bank app.
- And only half spent at least 5 minutes discussing the app or mentioned an advantage.
- Competitor reps outperformed the Client Bank on these latter four metrics.

Figure 1. Example of key strengths and weaknesses



Tips for Conducting Your First Mystery Shop

1. Be hands-on. You will need to do some shopping yourself. This not only enables you to add some personal observations and insights based on your shop experience, but also strengthens the credibility and authenticity of your shopper briefing and your results.

2. Prepare to both brief your shoppers on the shop (to ensure they fully understand what to assess and the detail of information they need to record) and then debrief them (to make sure what they observed has been thoroughly and accurately communicated). So in addition to the survey, put together shopper instructions, guidelines and scenarios. A good idea is to include a completed survey as an example for shoppers to follow.

3. Recruit credible shoppers as this is a key factor for success. This means recruiting shoppers who meet very specific criteria. For example, the shop may require high net worth bank customers or patients with specific medical conditions.

4. Dig deep in analyzing your findings. For example, if you are undertaking a competitor shop then you should draw insights on the competitor's:

- best practices to adapt;
- weaknesses to leverage to your client's advantage;
- unique product features to benchmark against, and hence see where your client might fall short;
- key selling messages to counter; and
- pricing to see whether the client is above, below or on par with their competitor's pricing.

(Sometimes I will go over a shopper survey three, four or even five times to uncover clues and to connect the dots.)

5. Clients pay close attention to shopper comments, so pulling out four or five telling comments is a must. (or, must-do.) A good place to look are the shoppers' answers to the survey questions, "What impressed you by how you were helped?" and "What did you dislike?"

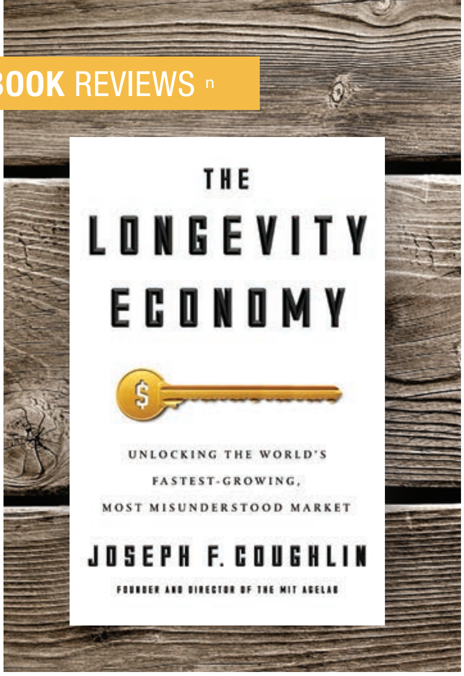
6. If, in addition to slides, a report is required, then create two reports. The first is the analysis, e.g. key findings, implications and recommendations. The second contains completed surveys and any other details like copies of competitor's literature. A report with both the analysis and completed surveys is much too much for one to absorb.

Conclusion

Qualitative market researchers are in a unique position to add mystery shopping to their toolkits. Not only do they possess the necessary skills to conduct high level shops, but when done in conjunction with other research they are conducting, mystery shopping helps to corroborate findings, and it also fills in gaps and deepens one's overall understanding of the issues being studied. Think of mystery shopping as investigative research, where one is in the field gathering intelligence and insights.

These high-level shops require the skills and experience of a market researcher to deliver the needed critical analysis, interpretation, and recommendations. They also offer qualitative researchers an excellent opportunity to expand their service offerings.

Think of mystery shopping as investigative research, where one is in the field gathering intelligence and insights.



The Longevity Economy – Unlocking the World's Fastest-Growing, Most Misunderstood Market, by Joseph Coughlin, PublicAffairs, 2017

Reviewed by Kay Corry Aubrey

- User Researcher
- Usability Resources Inc.
- Bedford, MA
- kay@usabilityresources.net

Each day in the United States, ten thousand Baby Boomers turn 65. People over 55 currently own over half of the disposable income, and with the US birth rate falling, by 2060 one quarter of the population will be over 65. This aging trend is well established and replicated throughout the developed world. So why do businesses keep creating products and services geared toward 25- to 40-year-olds?

In *The Longevity Economy,* Joseph Coughlin presents a comprehensive and engaging look into the roots of how aging has come to be seen as "a problem to be solved" rather than a life stage that we all hopefully reach and get to enjoy as fully capable and contributing humans. According to Coughlin, this unconscious cultural bias stifles the imagination of businesses resulting in bland and clunky products that address only the physical and mental decline that can go with aging, such as senior foods, adult diapers and "Help I've fallen and can't get up" medical devices.

Coughlin is the founder and director of the Massachusetts Institute of Technology AgeLab, whose focus is to show how we can invent a "Life Tomorrow" that makes the most of our extended lifespan. While the AgeLab is part of the School of Engineering, it relies on a multi-disciplinary approach to innovation that leverages insights from engineers, architects, and social scientists. They have close partnerships with major automakers, retailers, insurance companies, and other industries and are actively involved in the research and design of technologies that will likely become commonplace, such as self-driving cars. His team focuses on developing technologies that will not only make it easier for older people to live full and independent lives as we get older but also serve consumers of all ages.

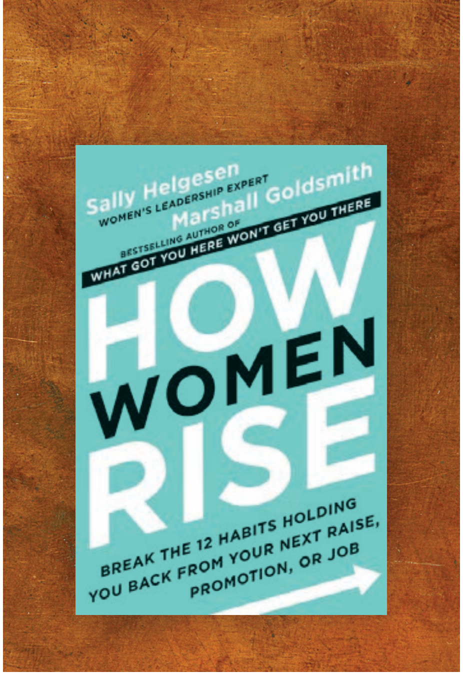
"THE GREATEST SUCCESS OF HUMANKIND IS LIVING LONGER, BUT NOW THE CHALLENGE IS WHAT DO WE DO WITH THE TIME THAT WE HAVE AND THE TIME THAT WE CONTINUE TO GAIN?"
— BOOK EXCERPT

The first part of the book focuses on the myths of old age that explain how we arrived at our current beliefs around aging and how these perceptions are out of sync with today's reality. It wasn't until the early 19th century that "the aged" were seen as a separate demographic group defined by the prevailing trends in Western medicine that to be old meant running out of "vital energy." In those days, old meant over 40. As the economy grew, so did the focus on efficiency and the belief that older workers should step aside to let younger people take over because older people were seen as no longer having the stamina, ability, and focus to do their jobs. Social Security institutionalized this last phase of life. When Social Security was created, however, the life expectancy of an average American was 63 versus the 78 years it is today. This situation has created what Coughlin calls "The Longevity Paradox," where we are living longer but are challenged with what we do with the additional years of life.

Qualitative researchers and anyone involved in product and service development and marketing will be most interested to learn about the AgeLab's research methods that produce transcendent products, which Coughlin details in the second part of the book. "Radical empathy" is a cornerstone of what has made them successful. The Lab's approach merges User Experience, qualitative and quantitative methods with big data. The book describes how the AgeLab runs concepts by a resident "Lifestyle Leader" panel which comprises thirty highly educated, wealthy and accomplished participants who are over 85.

In the chapter "The Future is Female," Coughlin explains how businesses must design products and services to suit a new type of Lead User—a middle-to-later aged woman who has gained a great deal of life experience and insight through being the primary caregiver of her children, parents, in-laws, and often her husband in later years. She lives longer, is more likely to be still working, and is a major influence on purchasing decisions, which in the US alone amounts to between $5 and $15 trillion annually. Older women have a much more focused and realistic understanding of aging and expect businesses to provide products and services that will help them continue to lead independent and fulfilled lives.

The Longevity Economy offers a fascinating and hopeful view of the future of aging as well as a roadmap for businesses and researchers who wish to engage with this burgeoning, gold-plated, but largely ignored demographic.



How Women Rise: Break the 12 Habits Holding You Back from Your Next Raise, Promotion, or Job, by Sally Helgesen, Marshall Goldsmith, Hachette, 2018

Reviewed by Susan Fader
- Fader & Associates
- Teaneck, NJ
- susanfader@faderfocus.com

The "confidence gap"—where women underestimate their abilities, think they are less skilled, and believe they are less able to do something than a man of similar qualifications and experience; and men overestimate their actual competence and abilities—seems as entrenched as ever. To help women break the "confidence gap" and 11 other self-limiting habits, Sally Helgesen and Marshall Goldsmith have written *How Women Rise: Break the 12 Habits Holding You Back from Your Next Raise, Promotion, or Job.*

And if you were thinking, "Come on now, it's the 21st century, is this confidence gap really still an issue?", a recent Twitter post provides an emphatic yes. In her post, Monica Hesse, a *Washington Post* reporter and columnist, addresses the issue of why the men are quoted at significantly higher rates than women:

"A few colleagues and I did a lighthearted story where we called up lots of famous people and asked about their favorite movies about their professions. So, what does the head of NASA think is the best movie about astronauts? What does Cal Ripken, Jr. think is the best movie about baseball? (Poignantly, I interviewed Anthony Bourdain about his favorite movie about cooking). In the end, we had 25 movies, but only seven female voices. Some readers were annoyed, and rightfully so. What they didn't know is that I was annoyed, too. I had called dozens of women. I had called a ratio of three women to every one man. The women kept saying "I'm not funny enough" or "I'm not a big enough expert" or "Try this colleague instead." The men all thought they were big enough experts. They were more than happy to talk."

So, sometimes what we see is a failure of journalism. But sometimes it's a deeper societal problem that has to do with confidence, and overconfidence, and with women feeling safe speaking up, and with women believing they should be taken seriously because they have, in fact, been taken seriously.

In *How Women Rise,* the authors draw on their different experiences and perspectives to write this book. Sally Helgesen is a women's leadership expert, and Marshall Goldsmith is an executive coach who wrote *What Got You Here,* his original book on habits that sabotage people's careers. Goldsmith had originally thought the habits he highlighted in *What Got You Here* are equally applicable to men and women, but through his subsequent executive coaching of senior male and female executives, he realized that while some of the habits are gender neutral, many of the habits he had outlined in *What Got You Here* are more reflective of how men behave. He recognized that some key hindering habits that he had not identified in *What Got You Here* are key stumbling blocks for women.

As the title implies, *How Women Rise: Break the 12 Habits Holding You Back from Your Next Raise, Promotion, or Job* focuses on the 12 habits that the authors feel women have that can sabotage their careers and working environments, e.g., *Reluctance to Claim Your Achievements; Overvaluing Expertise: Building Rather than Leveraging Relationships; The Disease to Please; Putting Your Job Before Your Career; Minimizing;* and, *The Perfection Trap.*

"WOMEN UNDERESTIMATE THEIR ABILITIES, THINK THEY ARE LESS SKILLED, AND BELIEVE THEY ARE LESS ABLE TO DO SOMETHING THAN A MAN OF SIMILAR QUALIFICATIONS AND EXPERIENCE; AND MEN OVERESTIMATE THEIR ACTUAL COMPETENCE AND ABILITIES."

What makes this book extremely helpful are the many relatable examples where women were not even aware that a behavior or habit was hindering their career, and, more importantly, the concrete steps that women can take so they are not sabotaging the potential to advance in their careers. Or just plain and simple: by changing these habits they can make their day-to-day work life easier and more enjoyable.

This is a powerful guide and very interesting book that is easily read cover to cover, and while one may feel that a number of these twelve habits may apply, the authors wisely recommend that it would be much more effective to identify and focus on no more than three key habits that one wishes to change.

This book is targeted to women, but men also could benefit from reading and absorbing its lessons in order to diminish the men are from Mars, women are from Venus situations that happen in the workplace.

Five Stars: The Communication Secrets to Get from Good to Great, by Carmine Gallo, St. Martin's Press, 2018

Reviewed by Susan Fader
- Fader & Associates
- Teaneck, NJ
- susanfader@faderfocus.com

Communicating better has become a major focus of CEOs at leading companies. Jeff Bezos has famously banned PowerPoint presentations from all Amazon executive meetings, which now start off (according to Bezos' 2017 annual letter) with everyone sitting silently reading a "six-page memo (written in Word) that's narratively structured with real sentences, topic sentences, verbs, and nouns." After everyone has had time to absorb the information in the memo, they then, and only then, discuss the topic.

Google's CEO, Sundar Pichai, is moving Google away from a PowerPoint bullet point presentation format to a more visual storytelling process, and he has instituted a training program to get Google employees up to speed on this more visual and less text-heavy approach.

Bezos and Pichai have different approaches to attaining the same goal of improving how people in their companies communicate. Their actions also spotlight the increasing importance and need of improving one's communication skills and becoming a skilled storyteller. A storytelling approach is a much more persuasive way to communicate than a fact-based PowerPoint presentation because our brains are hardwired for narratives.

"*FIVE STARS* IS DIFFERENT FROM OTHER STORYTELLING BOOKS IN THAT GALLO FOCUSES ON HOW AND WHY YOU SHOULD BECOME A BETTER COMMUNICATOR AND MORE EFFECTIVE PERSUADER."

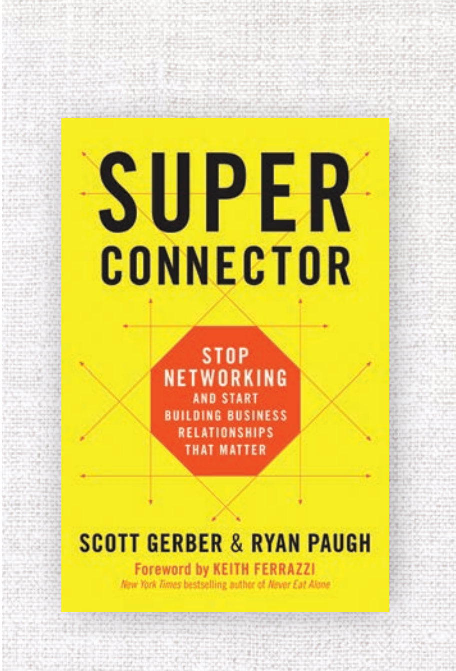
Carmine Gallo's well-written and interesting book, *Five Stars: The Communication Secrets to Get from Good to Great,* provides you with the tools and multiple diverse examples of how to become a skilled storyteller. He also provides, through a myriad of interesting examples, the context of why Bezos and Pichai and many other CEOs are changing the way people at their companies communicate. To emphasize that communication skills can make or break your effectiveness, Gallo points out that Jeff Jordan, a partner in Andreessen-Horowitz, a venture capital firm that has successfully invested in many high-tech firms, believes "every great founder can tell a great story. If a founder doesn't have it, it's harder to get funding, attract employees, or get attention."

Gallo, who is a storyteller/communication specialist, advices CEOs on how to deliver presentations and share inspiring stories. He is also the author of *Talk Like Ted* and *The Storyteller's Secret,* and he shares some of the effective Ted Talk techniques in this book. He named the book *Five Stars* because it is a term he feels "describe(s) the unique leaders, entrepreneurs, business professionals, and brands who stand out, who occupy their own universe…(and) as a metaphor. For example, you'll learn how business professionals who occupy top jobs in their fields were average or good communicators and transformed themselves into great ones."

A good storyteller creates sticky communication where what is shared is fully absorbed, processed, used, and retained by others. Gallo points out the objective of communication is usually to persuade someone to a certain point of view and "in the next decade, your ideas—and the ability to articulate those ideas successfully—will count more than ever. Persuaders are irreplaceable."

Five Stars is different from other storytelling books in that Gallo focuses on how and why you should become a better communicator and more effective persuader rather than just techniques to improve as a storyteller. This book is full of actionable ways to turbocharge your communication skills including: why you should focus more on "out-of-sights" than insights; how using the three-act storytelling structure used by successful screenwriters will enhance your storytelling skills; why choosing to focus on one main idea is a more winning strategy, even if there are many important ideas to share; there is no one right way to tell a story; brevity is better; and why you really have to practice, practice, practice if you want to improve your communication skills. Also, it doesn't hurt to read speeches by great orators such as Lincoln and Churchill.

While *Five Stars* does provide many storytelling how-to tips, it really is a book about how to better communicate, inspire, and persuade people, and that is what makes this a standout book. If you want to become a better communicator and persuader, *Five Stars* is a book you should read.



Superconnector: Stop Networking and Start Building Business Relationships that Matter by Scott Gerber & Ryan Paugh, DaCapo Press, 2018

Reviewed by Randi Stillman
- Bottom Line Market Research & Consulting
- Atlanta, GA
- restillman@bottomlinemr.com

Scott Gerber and Ryan Paugh believe that what matters most in life and business is not following the standard measure of transactional and self-interested networking but instead focusing on how many people you help, or serve, within your sphere of influence. In their new book, *Superconnector: Stop Networking and Start Building Business Relationships that Matter,* they help us understand the power and beneficial outcomes of building these relationships.

Gerber and Paugh definitely practice what they preach. They are co-founders of The Community Company, which builds and manages personalized, invitation-only communities to help professionals grow their networks and expand their business opportunities. They are also co-founders of Young Entrepreneur Council (YEC), whose membership numbers 1,700 under-40-year-old North American entrepreneurs whose companies make more than $1 million in annual revenue.

The co-authors define "superconnectors" as *"highly valuable community builders who make things happen through their keen understanding and utilization of social capital...the most important currency in the world."* For them, to think like a superconnector is to focus on how you can be of service to the person in front of you, whether actually or virtually, and to genuinely care about their needs. A superconnector introduces people to each other who might benefit from knowing one another because they share a common goal or passion. The point is to define which relationships matter most for you and to cultivate them without expecting immediate ROI. Consequently, Gerber and Paugh devote an entire chapter up front to the core skill of "habitual generosity," i.e., acting on the knowledge that your greatest returns and opportunities come when you least expect them.

Of course, there is no one-size-fits-all blueprint for building community. Gerber and Paugh lay out their systematic and authentic methods and provide useful tips. They begin with self-assessment questions to guide you to view relationships through a long-term personal lens by which relationships matter most, what paths to connection are right, and how you will sustain your community over time. An honest self-assessment ultimately attracts kindred spirits, who often become trusted connections.

Gerber and Paugh guide the reader through the mindset, strategies, and tactics of becoming a superconnector. Chapter titles reflect core lessons, e.g., "The Art of Selectivity," "The Power of Association," "Good Questions, Bad Questions, and Everything in Between," and "How to Make a Smart Ask as a Superconnector." The co-authors share many relatable and instructive anecdotes from their own experiences and the individual journeys of 41 high achievers listed at the end of the book.

Overall, Gerber and Paugh challenge us to rethink the way we interact with everyone on our individual journeys to achieve our business goals in the social networking age. Our communities provide a foundation for sharing knowledge and insight with others who deeply care about the same issues and topics as we do. Meaningful interactions, such as giving and getting feedback, support, introductions, referrals, and access to opportunities are by-products of intentionally cultivated relationships. The only caveat, which Gerber and Paugh explain and offer as a warning, is that if wealth is your main goal in joining or creating a community, your efforts will backfire.

"GERBER AND PAUGH CHALLENGE US TO RETHINK THE WAY WE INTERACT WITH EVERYONE ON OUR INDIVIDUAL JOURNEYS TO ACHIEVE OUR BUSINESS GOALS IN THE SOCIAL NETWORKING AGE."

Qualitative researchers will be delighted to learn that many qualitative skills and methods, notably asking the right questions, listening actively, and dot-connecting, play an important role in the context of developing a unique collection of mutually beneficial business relationships. It does not matter if you are starting out, established or in transition in your industry or job, this book provides useful insights.

Superconnector inspired me to re-examine my approach to building purposeful and sustainable business relationships. I welcome Gerber and Paugh's timely lessons given the challenges of evolving professionally in a noisy world of constant change. While I do my best to leverage technology to make meaningful connections, I am reminded by the wise, practical, engaging content in this book that what matters most in life and business is the human connection from helping each other. Above all, *Superconnector* has inspired me to re-examine how I provide value to others in my existing communities and to cultivate new business relationships, perhaps a new community, based on long-term mutual benefit.

FALL PODCAST: The Role of Qualitative Listening in Community Planning: A Conversation with Philip Denning, Cincinnati's Director of Community & Economic Development

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. Podcasts of these interviews are available at the QRCA website (qrca.org) under the Publications link as streaming audio.

In casual conversations with architects and developers, Podcast Editor Foster Winter has heard interesting accounts of exploratory meetings and interactions that are conducted with community stakeholders during a community planning process. Of interest is the work of Philip Denning, our guest on this edition of the *VIEWS* Podcast. Prior to joining the City of Cincinnati, where he is director of Community and Economic Development, Phil's work for a New Orleans architecture and planning firm involved him with vital community engagement projects post-hurricane Katrina. Beyond the world of marketing, it's qualitative research in action.

These community meetings are often very large group sessions. Listeners will note the tie-in with the March 2018 *VIEWS* podcast with Missy Carvin about the World Café Technique.

And speaking of previous podcasts, be sure to check out the archives for discussions with interesting folks and a variety of topics from co-creation to becoming a master moderator.

BURKE INSTITUTE

JANUARY THROUGH DECEMBER 2019

SEMINAR DATES, LOCATIONS & FEES FOR NORTH AMERICA

RESEARCH METHODS

RM01 - Practical Marketing Research $2,845

Newark, NJ	Jan 29-31	New Orleans	Sept 10-12
Charlotte, NC	Mar 25-27	San Jose	Oct 21-23
Chicago	May 14-16	Cincinnati	Dec 4-6
New York	July 15-17		

RM03 - Designing Effective Questionnaires: *A Step by Step Workshop* $2,845

Charlotte, NC	Feb 12-14	Chicago	Aug 13-15
Philadelphia	Apr 9-11	Cincinnati	Nov 5-7
San Jose	June 11-13		

RESEARCH APPLICATIONS

RA01 - Applying Research & Insights *Customer, Brand, Product* $2,495

Charlotte, NC	Mar 28-29	San Jose	Oct 24-25
New York	July 18-19		

RA03 - Market Segmentation & Positioning Research $2,845

Philadelphia	Apr 2-4	San Diego	Oct 16-18
Cincinnati	July 9-11		

COMMUNICATION

C01 - Writing & Presenting Marketing Research Reports: *Insights, Storytelling, Data Visualization* $2,845

Washington, DC	Mar 19-21	Las Vegas	Aug 20-22
Cincinnati	June 4-6	Chicago	Nov 13-15

DATA ANALYSIS

DA02 - Tools & Techniques of Data Analysis $2,845

Philadelphia	Feb 26-28	Chicago	Sept 17-19
Las Vegas	June 4-6		

DA03 - Practical Multivariate Analysis $2,995

Cincinnati	Mar 19-22	San Jose	Sept 24-27
Chicago	June 18-21		

QUALITATIVE

Q01 - Focus Group Moderator Training $3,345

Cincinnati	Feb 26-Mar 1	Cincinnati	Oct 1-4
Cincinnati	Apr 30-May 3	Cincinnati	Dec 10-13
Cincinnati	July 30-Aug 2		

Q02 - Specialized Moderator Skills for Qualitative Research Applications $3,345

Cincinnati	Mar 12-15	Cincinnati	Oct 15-18
Cincinnati	June 25-28		

Q03 - Next Generation Qualitative Tools: *Social Media, Online Communities, Virtual Research Platforms* $2,495

Philadelphia	May 7-8	Cincinnati	Nov 13-14

Please note all courses can be customized to create on-site programs for your organization.

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- Certificate Programs (Qual/Quant Certification)
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- Recommended seminar combinations: RM01 & RA01, Q01 & Q02, DA02 & DA03
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