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Helping you help your customers make
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www.mnav.com

845 418-4565 Voice

grs@mnav.com

\$350.00

Comprehensive Course on...

How to Moderate Telephone Focus Groups

By

George Silverman

President, Market Navigation, Inc.

(Inventor of the telephone focus group and helluva nice guy)

How to...

- **Convince skeptics to try telephone focus groups**
- **Design the research**
- **Set up the logistics**
- **Recruit the respondents**
- **Actually moderate the sessions**
- **Interpret and report the results**
- **Manage client expectations**

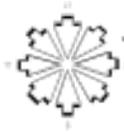
All without having to eat airline food.

Includes: Special Report: How To manual that includes moderator introduction, inviting scripts, confirming letters, instructions to participants and clients, special moderation techniques and many other secrets developed from 31 years' experience in over 7000 groups.

Published by:

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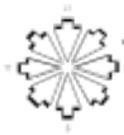
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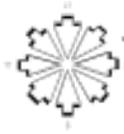
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What you are holding in your hands

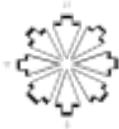
You are holding in your hands closely guarded secrets that have taken me more than 25 years to refine, in over 5000 telephone groups. This represents almost \$25,000,000 in today's dollars. I think that this on only a very tiny percentage of the total possible market for telephone focus groups.

By getting over your initial reluctance to conduct groups without seeing the participants, you can make a lot of money or — if you are on the client side — save your company a great deal of time and money by specifying telephone focus groups, where appropriate, instead of face-to-face groups or individual interviews.

As I said, these have been closely guarded secrets. I used to take all sorts of precautions to make sure that they didn't fall into competitor's hands. Most particularly, I used to consider my inviting script, confirming letter, moderator opening, and several special techniques so proprietary that I made people sign non-disclosure agreements before showing them. These documents and techniques have the simplicity that only years of honing and polishing can achieve. Please don't be deceived by that lack of complexity. Take the suggestions seriously enough to follow them, then experiment to your heart's content. Share your discoveries with me and I'll continue to share mine with you.

Why am I divulging these secrets now? For several reasons:

- The cat's already out of the bag. Many moderators are conducting telephone focus groups, using their own techniques or incompletely pirating part of mine. How competently these groups are conducted reflects upon me as the inventor and developer of the telephone focus group. Every time they are done badly — especially by competent, trusted moderators who just don't know how to do telephone groups or who use inadequate equipment — people conclude that telephone groups don't work. I then have to fight this perception in a battle I can't win. After all, if the moderator is good, it must be telephone group methodology that is bad. The better telephone groups are conducted, the more accepted is the methodology and the easier it is for me to spread the word.
- Only a small fraction of the potential market for telephone focus groups is being tapped: I believe that a great many groups that are presently conducted face to face would be at least as good, if not better, by phone. Also, there are many groups that telephone focus groups make possible that are not even considered because it is not practical to run them face to face. I can only moderate so many groups, so I am looking for ways to leverage myself. So, by selling this course, I increase revenues, while expanding the market.



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- I also have the best telephone focus group facility in the country, so hopefully I'll get a facility fee for every group that you run.

I hope that you will get to feel some of the thrill and excitement that I still experience with telephone groups. It's still amazing to me that you can bring people together, from all across the country, who you would never ordinarily get the opportunity to hear interact with each other.



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Who should take this course

This course is for *experienced moderators* who would like to learn how to apply their skills to telephone focus groups. It may also benefit those people who will not be conducting telephone focus groups themselves, but *who buy such services from outside moderators*. The more they know about the actual techniques and procedures, the more informed they will be about what they are buying and the better able to evaluate their suppliers.

This course assumes a *basic familiarity with telephone focus groups* and assumes that you have read my Special Report “*Introduction to Telephone Focus Groups*” (\$50.00), which gives the background of telephone focus groups, answers the basic questions about them, and tells why they are better than face-to-face groups for most situations. *If you have bought this course, you should have also have received this Special Report free as part of the package.*

Also soon to be available is a Special Report “*Advanced Focus Group Technique*,” which is not restricted to telephone focus groups. It goes into how to get beneath the surface in focus groups through projective and other techniques, how to get to the right psychological level, how to conduct concept tests, the skills that qualitative research consultants need, and the advanced uses of focus groups.

What you will learn

This course will give you the means to learn how to consult with clients (internal or external to your organization) to help them decide when to use to use telephone focus groups, how to: design the research, set up and manage the logistics, recruit the respondents, open the sessions, use specialized telephone techniques, interpret the results and manage client expectations.



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How to sell telephone focus groups

Whether you are recommending telephone focus groups to clients or your colleagues, the problem is the same. First of all, it is very difficult for people to “get it.” The idea that *telephone focus groups can actually be better than face-to-face groups* goes contrary to common sense. If you remove the visual element, clients feel, you obviously have to lose something. It’s very difficult for most people to believe that the lack of visual element actually opens people up, and that it this more than makes up for the absence of visual non-verbals. In most circumstances, it will be impossible to convince them. In most cases I wouldn’t even try. Instead, find a situation where they have to use telephone groups, where *they have no other choice*. Common sense will tell you that these situations are rare. Actually and fortunately, *they are abundant*. Read on.

How should clients who have never used this methodology be first exposed to it?

When clients have never used telephone focus groups, I would generally recommend that you ***look at the leveraged influencers*** who are difficult to get into face-to-face groups and ***propose to do telephone focus groups of them***. After all, there is no other way to get them into groups, and individual interviews are going to be too superficial, time consuming and costly, in most cases. Also, it turns out that there are many more *influencers* than actual *purchasers*. It’s a function of the fact that each purchaser tends to talk to several kinds of people before making a purchase. This fact alone should multiply the number of potential groups that you can be researching.

I’m reprinting a few pages from the Special Report “*Introduction To Telephone Focus Groups*” that will help you help others identify these people. Please forgive the redundancy, but I want to save you the trouble of looking it up.



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Are You Overlooking These People In Your Marketing?

Note: this section also appears in my Special Report, *Introduction to Telephone Focus Groups*.

Telephone focus groups can help you get inside the heads of people who are otherwise difficult to research — people who you wouldn't even consider researching under most circumstances, let alone trying to get into focus groups!

This section is intended to stimulate you to think about the kinds of people who you aren't researching, but should.

Leveraged influencers

Every product that I have ever looked at has people who influence the ultimate purchaser: People who are up the distribution chain, or who serve as advisors or who otherwise influence the decision.

For instance, if a pharmaceutical product isn't prescribed by physicians, it won't be bought by the patient. And it might not be prescribed unless it's endorsed by the experts, or chief pharmacists, or other formulary committee members. A replacement auto part will not be installed if the technicians or parts jobbers don't stock it. If a product isn't liked by the store clerk, the customer might be talked into another product.

These people can have a tremendous effect on how well your product is adopted. They may persuade, prescribe, endorse, advise, specify, approve or recommend the product to others. I call these people "leveraged influencers" because by concentrating your effort on just the right place, their decisions are multiplied and amplified. ***In many cases, they are actually more important for the marketer to influence than the ultimate purchaser.***

Yet, they are often not researched at all. They are often overlooked. Even when they're not, they are very hard to research. They are besieged by requests for interviews. They don't want to fill out or participate in surveys. They have very little patience for one-on-one interviews. Even when you can get them into one-on-one's, their answers are often very terse, or extremely verbose. You are often left with a confusing mess of contradictory opinion. You don't know how they would react to the opinions of others. What you really need are focus groups of these people, with the richness and depth that you get from interaction, but focus groups are out of the question because of the logistics.



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These people are too busy and geographically scattered. In the rare cases where experts agree to attend a focus group, they often have to be flown to a central location. It's not unusual for such a focus group to cost tens of thousands of dollars, when you add up incentives, travel and entertainment. If the people are from the same geographical area, often they don't want to talk to competitors. One way to get them is at a convention, but the people who will attend focus groups at conventions tend to be a little weird. They are the types of people who will attend a focus group at six o'clock in the evening in San Francisco. Don't they have anything better to do? They tend to be the social misfits. I call them the "plaid pants crowd."

What happens when the irresistible marketing research technique meets the immovable respondents.

These "inaccessible" people tend to fall into several categories:

- High-level people — too busy for almost anything.
- Geographically dispersed — such as airport directors.
- Extremely low incidence — such as the first triers of a new product

Now let me let you into a secret, so that what follows won't seem theoretical:
These people will participate in telephone focus groups!

No kidding. They really will. I'll get to the reasons in a moment, but I want to make it real for you by giving you some examples: I've conducted telephone focus groups of Nobel-Prize-winning economists, U.S. Congressmen; Presidents and CEOs of Fortune 100 companies; CFOs, treasurers and COOs of Fortune 100 companies; the heads of the leading alcoholism clinics, heads of breast cancer clinics, and just about every medical specialty there is; hardware store owners, supermarket managers, the coroners of major cities, HMO administrators; chief pharmacists of HMOs, hospitals and nursing home chains; chain store buyers, major wholesalers, school superintendents, multimillionaires, magazine editors, airport directors, computer store owners, and many other "impossible-to-recruit" respondents.

Many of these groups were done before I started offering monetary incentives! Why do such people participate in telephone focus groups? Certainly not because they're convenient (plenty of things are convenient that they wouldn't go near) and certainly not for the monetary incentives.

They do it because they are interested in the topic and because they are starved for interaction with their peers. It gets pretty lonely at the top, and people want to hear what other similarly accomplished people think, how they handle similar problems, and what they anticipate doing in the future. They realize that they can only learn by direct experience and from other people who are at or above their level. These people are few and far between. That's why such people jump at the chance of participating in a telephone focus group, as long as they are invited straightforwardly



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and professionally, the topic is interesting, and they feel that they will learn something.

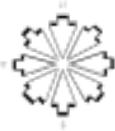
Over the years, I've developed dozens of techniques for inviting hard-to-reach, high level, geographically dispersed people. This isn't the time or place to go into them all, but I am confident that I can get almost any category of people provided that they are identifiable and that there is a legitimate purpose to interviewing them.

Whether you know it or not, you need these people

OK, I know that you probably don't need the outrageously difficult kinds of people I've mentioned above. But you *do* have leveraged influencers in your situation. I've never yet to hear of a marketing situation that doesn't. You need to understand them and figure out ways of influencing them. You need to get inside their heads.

Look at your product. Now look up the distribution chain and out to all of the important decision influencers.

To help you think about who you may be missing, I've prepared the following checklist. I hope it's helpful.



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Up the distribution chain

- Distributors
- Dealers
- Agents
- Wholesalers
- Jobbers
- Institutions
- Chain store buyers
- Retailers (owners, managers, clerks)
- Manufacturers
- Delivery channels
- Showroom people
- Administrators
- Financial approvers
- Architects, physicians and other
Specifiers and prescribers

Other influencers

- Third party payers
- Industry gurus
- Approvers
- Committee members (Board members, other approval committees)
- Triers who didn't buy
- Researchers
- Executives and managers
- Legislators
- Specifiers
- Family members
- Salespeople: your own and other
- Customers of your competitor's product
- Dissatisfied ex-customers
- Technicians
- Economists
- Others???

Who are the leveraged influencers in *your* situation? Are some of them even more important than your customers?



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Selling Internal and External Clients on Using Telephone Focus Groups

When to recommend telephone focus groups

I firmly believe that telephone focus groups are better than face-to-face focus groups, all other things being equal. You get better, higher level respondents, geographically dispersed, in their own natural environments, unintimidated by being in visual contact with each other. Whew! That's the shortest statement I ever made on the subject!

For a more detailed and substantiated version of the above statement, and to help you persuade people about the superiority of telephone focus groups, I have written an article in my Special Report, "*Introduction to Telephone Focus Groups.*" The article is called "*The Shocking Truth (Even to me) About Telephone Focus Groups.*" The Special Report is included with this report. Feel free to reproduce the article (not the whole Special Report) as is and freely distribute it. I think it will help.

When NOT to recommend telephone groups.

The wrong kinds of clients.

There are people who are extremely rigid, who will get extremely disoriented at not being able to see the participants. I wouldn't recommend telephone focus groups to these people. Or they may be extremely skeptical. In the latter case, you will have to use your judgment carefully, because I have found that the biggest skeptics are the biggest converts. The skeptics who are most likely to become converts are those who are rationally skeptical (as distinct from prejudiced), who have specific reasons, concerns and objections, who are looking to learn from actual experience, who are creative and who can admit that they are wrong. Stay away from people who have to prove that they are right and you are wrong, who tend to distort experience to fit their own preconceptions, who have "hardening of the categories," and who are inflexible.

The wrong kinds of respondents.

Don't recommend telephone focus groups for people of *extremely* low intelligence (people of average and even slightly lower than average intelligence can actually be *better* on the phone than face to face), extremely young children (I've done 9 year olds and suspect that even younger children would be appropriate.), very elderly people (screen for ability to speak on the phone appropriately), people with extremely heavy accents, and anyone else who would not be able to speak on the phone.



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The wrong kinds of research objectives.

Don't recommend telephone focus groups for situations where the respondents have to look at, touch or feel the product. There are many exceptions, of course. You can often send pictures, videotapes or sometimes even the product itself. More about this in the section on stimulus materials.

Also, *extended* idea generation sessions are best done face to face. I have done two or even three hour idea generation sessions successfully on the phone, but anything longer I would conduct face to face.

How to describe telephone focus groups to clients.

There are some ways to describe telephone focus groups that tend to bring up qualms. Other ways of describing them tend to undercut the qualms before they come up.

How to describe them: Telephone focus groups are “groups of people all on the phone together, with a moderator. They can all hear and speak with each other. The discussion is conducted over a specially-designed telephone conference system, with every participant in his or her own home, office or other natural environment.”

Words and descriptions to stay away from.

There are certain **phrases that should be avoided**: Do not use the phrase “conference call.” Most executives have been exposed to awful conference calls, over terrible equipment. This phrase, therefore, brings up images of non-interactive non-discussions, that can't be heard. The phrase “conference call” is also ambiguous, sometimes meaning a group around a speaker phone talking with one other person. I once did a major article on telephone focus groups for Medical Marketing and Media magazine (an excellent, very professional magazine, I hasten to add), where the lead illustration was groups around a speaker phone, completely missing a major idea of the article: each person in his/her natural environment, talking over ordinary telephones, but linked by special high-quality equipment. Just another example of Murphy's Law of Communication, “If people can misunderstand you, they will, and in the worst possible way.”

Also, try to stay away from the words “telephone” and “phone” as much as possible, although they are not completely avoidable. They seem to be negative words. Almost everyone says, “I don't like the phone,” but it is probably the most successful product/service ever introduced in human history. I usually refer to “phone groups,” then get right on to the benefits.

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How to undercut the qualms before they come up

Immediately follow this description (“focus groups conducted over a specially-designed telephone conference system, with every participant in his or her own home, office or other natural environment”) with the idea that when people can’t see each other, they tend to open up more. Also, you can get a wider geographical representation, also allowing people to open up more since they are not in the presence of competitors. Talk about the fact that people’s emotions, hesitations, doubts, excitements come over the phone and are easily read.

Commonly raised concerns and their answers

You can’t see the participants

Obviously, this is the most common qualm, which leads to the worry that *it will be difficult to interpret what participants say, or don’t say*. This has been answered in detail in my article “*The Shocking Truth (Even to me) About Telephone Focus Groups,*” so I won’t go into too much detail here about how to answer this, and related, qualms.

First of all, I would suggest that you bring this issue up right away, rather than wait for the client to bring it up, since your answer may then look defensive.

The basic answer is that while it is true that you can’t see the participants, they also can’t see each other. The fact that they can’t see each other lowers the intimidation factor and increases psychological safety. This, in turn, makes people open up much more than they would if they were face to face.

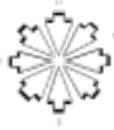
Also, there are plenty of aural and oral non-verbal cues on the phone to let you know how people feel. You can hear every little nuance of participants’ voices. There are also a variety of techniques to draw people out and interpret how they feel.

In addition, people are in their own natural environments (usually their home), and they are speaking with people in different cities. Again, these lower the intimidation factor and increase psychological safety.

The bottom line is that psychological safety is so dramatically increased on the phone and people open up so much that you have no trouble knowing where they stand.

You won’t be able to know what’s going on

Another common qualm is that you won’t be able to follow the conversation, since you cannot see who is talking. The moderator *does* know because a screen tells him/her who is talking. The moderator always asks people to use their names whenever they speak, so that the client can follow it during the session. Of course, it’s also on the audiotape, unlike face to face groups!



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Clients also wonder whether the session will be a chaotic free-for-all, with everyone talking at once. The best way I've found to answer this is to confidently say "It's not a problem." I don't know why, but you just don't get everyone talking at once, the way you sometimes do in face-to-face groups. I think it's because it's almost impossible to talk when voices are coming into your ear. In the rare cases where two people try to talk at the same time, the moderator can tell who they are from the screen and say something like, "Harry and Joe were trying to talk at the same time. I think Harry was first by a split second, then we'll get to Joe."

For other questions and qualms, together with how to answer them, you might also want to see my article, "*Questions and Answers about Telephone Focus Groups*" in my Special Report "*Introduction to Telephone Focus Groups.*"



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Design considerations

Nationwide vs. regional representation.

With telephone focus groups, you can reach as widely or narrowly as you want. As I write this, I am about to conduct focus groups of product managers from different countries around the world to assess the PR support they need from the home office. Each group will have six to eight people from different countries.

So, you can conduct worldwide focus groups, as long as you can arrange for at least some of the participants to participate in the middle of the night (their time). I often do nationwide experts groups, and will end up having to include a key expert who is off to another country at the time of the session. They are surprisingly willing to participate with their peers at odd hours, just to make sure that they are not left out.

More commonly, nationwide groups are able to include people from all of the major regions of the country. In that way, four nationwide phone groups can often do the work of six face-to-face groups, and go into far greater depth. Since you've achieved the geographical representation in each of the four phone groups, you can concentrate on going into greater depth. You can keep getting in deeper, developing the material that turns out to be important, and leaving out material that you no longer need to hear. With six city-wide face-to-face groups, you often have to keep asking the same questions to see if there are any regional differences.

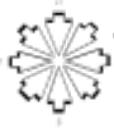
Of course you can also narrow the beam. You can zero in on a broad region (the "North" vs. the "South"), or specific states, cities, or even the same building. Not only can you go as broadly or narrowly as you want, you can also zero in on different segments nationally: For instance, you can conduct separate or mixed groups of rural, suburban and urban respondents.

Just as people are not used to thinking about the possibility of researching the high-level people that telephone focus groups make possible, people are not used to thinking about these geographical options. So you need to encourage your clients to broaden their thinking.

The surprising ability to mix participants you wouldn't mix face to face.

Mixing natural "enemies"

People are less intimidated in telephone focus groups, because they can't see each others' looks of disapproval and because they are from different parts of the country, so they are not competitive. You can mix people in telephone groups that you wouldn't ordinarily mix face to face.



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For instance: physicians/nurses, surgeons/nutritionists, bosses/employees, men/women, children/parents, etc. can be (and have been) mixed with very productive results.

Example: A nutritionist can vent her feelings about how ignorant surgeons are about parenteral nutrition without having to confront someone with whom she will be working next week. The surgeon can then talk about his feelings about the unrealistic expectations of the nutritionists, without insulting someone upon whom he will have to depend. In this way, we eventually discovered common ground upon which our client could get both segments to support their product.

How to run heterogeneous groups. Some tips.

Tell people *why* the group is mixed or heterogeneous. It may be bipolar, like the surgeons/nutritionists example above. Or, it may be heterogeneous groups of all different medical specialties (to research attitudes toward a national health care plan, for instance). Tell people why you have invited such a diverse group. For instance, you might say that you need to get the widest range of opinions from the perspective of the most diverse possible group of people. This will encourage them to express their differences openly.

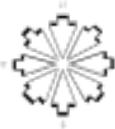
This ability to mix people who you might want to mix — keeping in mind that it's not always desirable from a research point of view to get interaction between different kinds of people — can further cut down on the number of groups that is necessary. So, instead of automatically thinking about running separate groups for different types of people, help you clients think about combining different kinds of people when the combination is likely to yield richer ideas.

New research designs which are impossible or difficult to conduct face to face.

Split/merge design. You can conduct a mixed group of satisfied users of a product and interested prospects. Then, at some point, split the group, giving the satisfied users the assignment to develop the most compelling argument for use of the product, and the interested prospects the assignment to refine their questions and objections to the product. You then merge the sessions, asking the users to convince the prospects, and the prospects to resist reasonably. In this way, you can simulate the word of mouth process and refine the most persuasive set of reasons to use the product.

Electronically, we can split and merge the groups at will, and in any configuration. We can even split the groups into dyads or triads.

Emergency focus groups. Your client has an emergency: a product recall, adverse publicity, an appearance on 60 Minutes. You need to conduct four focus groups tomorrow. We can farm out the recruiting to a company that has subsidiaries in ten



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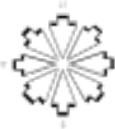
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cities. Each city only has to recruit four participants. Far less difficult than ten participants in four cities! You can do them tomorrow, since you don't have to travel! (What was the motto of the RAF? "The difficult we do right away, the impossible takes a little longer.")

Example: Two days after Nixon announced his "wage/price freeze," I conducted a group of the country's leading economists (four of them (so far) were present or eventual Nobel Prize winners).

Experts groups: You can conduct groups of the leading experts in the world, on almost any topic. It turns out that experts are extremely willing to participate in telephone focus groups. For more on this, see the material starting on page 9.



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Other support that I can offer you in selling telephone groups

Articles

Most of the chapters of the “Introduction to Telephone Focus Groups” are available in individual article form, as are some of the chapters in this course. If you have a particular client who would greatly benefit from telephone focus groups, but you still can’t sell them on conducting telephone focus groups, give me a call. I may be able to help you out by providing articles or other written material.

Phone-in demos

Likewise, I’m happy to set up demos for you and your client in which several people (from your client or from our staff) can participate. This will give them a sense of the quality of our conference system, and how easy it is to get a sense of what the participants are thinking and feeling.

Demo tapes of actual groups

You have been provided with a demonstration tape with this course. Feel free to loan it out to prospective clients. If you need another copy, let me know.



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How to set up telephone groups **Frequent questions**

I have a client that is interested in running several telephone focus groups, what do I do?

First of all, I'll be glad to give you the benefit of my experience in research design of phone groups. So, you may want to call me to serve as a sounding board on such issues as number of groups, mix, whether the client should be revealed, advance materials, special techniques, etc.

Call us to determine available dates and times. If you have a date in mind, we will try to accommodate you. Try to book dates at least 3-4 weeks in advance allowing enough time for inviting and availability. On several occasions, we have conducted groups less than 48 hours after they were requested.

How much will it cost more to run a telephone focus group?

Please see our latest price sheet. Prices may vary for different research specifications.

I may want you to do the inviting, can you tell me what is involved?

You can use your own recruiters (we call them "inviters"). We will be glad to brief them on the pitfalls to avoid in inviting for telephone groups (such as time zones, how to describe the session, etc.).

If you would like us to handle the inviting, we would like to set up a client briefing to go over the specifications of the research objectives. We accomplish this by setting up a convenient time for you and your client to dial into our conferencing equipment for a briefing. This also allows you and your client to hear our teleconferencing equipment firsthand. On occasion, our in-house inviting department is booked, so we may work with other proven vendors that specialize in the area of your research. We handle all the administrative work, whether we invite in-house or work with an outside vendor.

I've never moderated a telephone focus group before, how does this work if I can't see the participant's faces?

We will send you our remote viewing program and instructions, which will allow you to see participant names on a PC* screen. An asterisk blinks next to the name

* IBM PC compatible only. Sorry, we don't yet have an Apple Version. If you have an Apple, you can use a communications program that will allow terminal emulation of the Wyse 60 terminal. I don't which program(s) will do this, so if you find one, please let me know.



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of the person who is speaking. It allows you to see who is speaking, or even clearing his/her throat prior to speaking! This program will be mailed to you prior to your telephone conference. We will set up a time for you and our technician to test this before your session date.

After I've booked the dates and times with you, done the research briefing, given you the go-ahead to invite, what happens next?

We will keep in touch with you on the status of the inviting as often as necessary. On the day of the session, you will receive a session sheet with participant names, and any other relevant information you requested. We will also need the telephone number for the moderator and a list of any clients that may be calling in to listen.

When will the moderator and participants be contacted?

The participants will receive a confirming call **the day before** each session. The participants will receive a reminder call approximately **one half hour** prior to the start of the conference. The technician will arrange for the moderator to dial in remotely.

How do my clients listen in to the session?

We will provide a phone number for your clients to call us. They can listen in to the group, but their lines are muted, so that they can't be heard. They can signal the technical assistant for any help they need. (See the attached *Dialing Into Your Telephone Focus Group*).

If there are several clients listening in, how can all the clients pass messages to the moderator without interrupting the group?

This can be set up ahead of time. If the moderator is using the remote viewing program, the technician passes messages on the PC screen. We recommend **one** person be able to pass messages to the moderator via our technician. The client can press * 0 (Asterisk followed by Zero) on a touch tone phone. This which will alert the technician. The technician will go onto the client's line privately to get the message. We suggest that the client keep the message **brief**, so that the assistant can write it quickly and the moderator can read it with minimum distraction. (see *Dialing Into Your Telephone Focus Group*). The client can also pass messages from a fax machine. If the moderator is not using the remote viewing program, we cannot pass messages without interrupting the group. Another method sometimes used is to keep an separate, open line between the moderator and the client, with an assistant on that line. The assistant can then write notes and hand them directly to the moderator.



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How many audio tapes will I receive? When will I receive the audio tapes from the sessions?

We send you two audio tapes via regular mail or for an additional charge we can overnight them to you. This is usually set up ahead of time.



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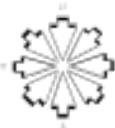
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Quick Reference Checklist For Telephone Focus Group Facility Rental

- Call us to reserve dates and times for your sessions. We will then send you a confirming letter stating all of our arrangements for your sessions and a facilities rental checklist.
- Establish who will be doing the inviting.
 - If The Teleconference Network is doing the inviting,**
 - We need to set up a telephone briefing time to review inviting specifications.
 - If we will be inviting from client-provided lists, set up time frame for receipt of these lists.
 - Please remind your client that nothing can happen before the lists are received.
 - Also remind your client that changes in specs due to what we find out from calling the lists will usually result in additional charges and can effect time-sensitive scheduling.
- We will send the moderator the remote viewing program and set up a date and time for your remote test.
- The day of the session, we will provide to the moderator a session sheet with participant names.
 - If we are not inviting, we need the list of participant names and phone numbers the day of the session, also the phone number for the moderator.
 - We need the names of your listeners.
- One half hour prior to your session, our technician will place reminder calls to all participants and the moderator. The moderator and our technician will establish a time for the moderator to dial in remotely. (Please make sure the moderator has the remote instructions with him/her.)
- At the scheduled time, we will dial out to all participants and the moderator.
- Prior to the start of the session, the technician will go into the moderator's line privately and let him/her know who is not on-line before the start of your session. (The moderator will see who is on-line from remote viewing)
- When the technician stops the music, the moderator may begin the session.
- If the moderator or the client needs to speak with the technician, please press * then 0 on your touch tone phone.
- Inform your clients to stay on the line after the session.



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Recruiting

Who does the recruiting?

Your own, our own internal people or our outside suppliers. If we go outsource, we use only our network of proven, professional people who have done work for us repeatedly in the past. We'll be glad to discuss who we use for different kinds of projects.

How many do you recruit?

It varies. I like to have 7-8 in most of my groups. To reach that number, we usually recruit 9-10. The show-up rate is much higher for telephone focus groups than with face-to-face groups. I strongly believe that for the business-to-business and professional groups that constitute most of our business, over-recruited participants should not be turned away. They are not coming for the incentive fee, they are coming to learn from their peers, and are looking forward to the experience. I consider it unprofessional to turn them away, and won't do it. Regardless of whether we have done the recruiting or you have used an outside supplier, please don't ask us to turn people away, even if you have to go with a group of 11 or 12. You can have more participants in telephone groups, since they are more orderly and people can't break into side conversations.

Incentive fees ("Co-ops," "Honoraria")

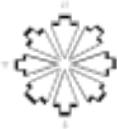
As of this writing (1994), fees tend to be around the same to a little less than face to face fees: about \$25-50 for consumers, \$75 for pharmacists and nurses, \$100 for general practitioners and business executives, \$125 for medical specialists and \$150-600 (or even more with publishing rights) for the nations' leading experts.

These may vary according to how many people are on your list, how much notice until the session, the length of the session, the topic of the session and any homework the participants may need to do before the session.

The highest incentive fee that I have ever paid is \$1000 per participant to medical specialists who had to write up cases, review each other's cases, participate for three hours and sign a release for publishing rights.

Pitfalls to avoid in recruiting

Make sure you tell the participants what's in it for them. They don't care why you are doing the research. They want to know what they will learn, or why they will have fun, etc. See the inviting script in the Appendix. Take it seriously. I consider it a major piece of proprietary information and an important competitive edge. I kept my



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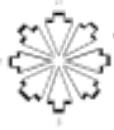
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inviting script secret for years, but in the spirit of full disclosure, I'm including it in the appendix. It comes from over 25 years of refinement. It works. Generally, when you get too far from it, it will not work. In fact, if you want to depart from it radically, we'd prefer that you use your own recruiters.



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Working with a telephone conferencing service

Why you should never use a long distance carrier (AT&T, MCI, Sprint, etc.) to set up the telephone conferencing for your focus groups

These services are long distance carriers. They are not set up to provide the high degree of service needed to conduct telephone focus groups professionally. You need a very intelligent, highly motivated person to monitor your sessions, and to handle the participants. The person has to convey a high degree of enthusiasm, informality and professionalism during the pre-calls and the actual setting up of the session. Participants have to be told what to expect and be kept informed. If there is a problem, such as noise on a line, the technical assistant has to detect the problem and fix it with a minimum of disruption. All sorts of minor problems can happen, such as a participant accidentally disconnecting himself, to a participant's dog barking in the background, and many others. If they are not handled promptly, they can become disruptive.

Private conference call services

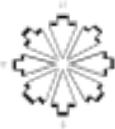
There are several private conference call services which are much better than the phone companies. The main difference between them and us is that all of our facilities and procedures have been designed around telephone focus groups. I'm my own biggest client. My staff can help you design the right procedures that you need for your particular projects. We can handle you recruiting, or advise your recruiters about how to design the recruiting for your more demanding projects. I'm available to give you advice on the more difficult research issues. No service provides the kind of support that we give.

Features you should require in a private conference calling service

Find out exactly what they are saying in the pre-calls and the greeting. Make sure that it is said enthusiastically, or you will have more last-minute drop-offs. Make sure they are playing professional-sounding music, not elevator music (Ours is specially selected exciting orchestral overtures, designed to convey the anticipation of an exciting happening.) Make sure that the technical assistant will get anyone who has been disconnected back on the line. Make sure that they attend to all the little points that are important to focus groups.

You also must have the ability to split and merge conferences, to have full duplex talk, to operate on high quality fiber optic computer lines, and a remote viewing option.

Or just leave the details to us.



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Pitfalls to avoid

The worst thing that an outside facility can do is convey to your respondents a sense of bored indifference. You need intelligent people who know how to leave messages with secretaries and spouses, who know how to strike the right balance between informality and seriousness, and who know how to handle all of the possible variations and problems. The remark that we want to hear — and *do* hear — most often is, “It was handled very professionally.”

The equipment has to be such that every line is crystal clear, without static. We’re on a completely digital fiber optic network, with higher-than-normal bandwidth computer lines. Any problems are generally at the telephone of the participant, and our people know how to help you fix any problem. This is important because lower-volume participants are perceived as not as bright as the others.



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How to prepare the client

Managing their expectations

Have them listen for non-visual cues

Suggest to the client that they write down the names of the participants. Some like to put the names around an imaginary conference table. Remind the clients that they will not be able to see participants, so they need to be particularly attentive to non-visual non-verbal cues, such as enthusiasm (or lack of it), hesitations, and other emotional cues.

The “only a few participated” illusion

Warn them about what I call the “only a few participated” illusion. Often people listening to a telephone group think that fewer people participated more often, and that several people did not participate at all. I don’t know why this is, but it is sometimes a very strong illusion, even when you have been scrupulous about making sure that the participants use their names. Mention this to clients and encourage them to get into the habit of making a small tick mark next to each participant as they talk. Of course, it is also important to point out that it is not important that everyone talk exactly the same amount. Some clients make the assumption that it is important that every respondent get “equal time.” There is no sound research basis for this that I know of.

The “they only talked with the moderator illusion”

Since the participants can’t see each other, they often direct their remarks to no one in particular, or to the moderator, even when they are reacting to someone else. This can set up the illusion that they are only talking to the moderator. They don’t and they aren’t.

“I couldn’t tell who was talking”

Make sure that you have the participants use their names when they talk. It’s very easy to forget this (I’m the worst offender), but if you do, your clients will be upset, especially if they don’t have much experience with telephone focus groups.

“I don’t believe them.”

People are more likely to be frank on the phone than face to face. If you are using techniques which probe beyond the superficial rationalizations that people offer



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when asked why they do what they do, your client should take the respondents' remarks seriously.

“What did they really think? They seemed to be all over the place. We didn't reach consensus.”

Warn your clients and the participants that you are not necessarily looking for consensus. You're looking for the broad range of opinion, when it's there, and for consensus in the rare situations where everyone agrees.

“It was too interactive, wild.” “It wasn't lively enough.”

Groups differ tremendously in their degree of interaction. Telephone groups tend to be a little more interactive. I can't encourage you enough to listen to tapes of your groups, and even to get other moderators to listen (on a confidential basis) to you groups to see if you are doing anything that is cutting down interaction. I've rarely heard a focus group (mine or anyone else's) that doesn't have some room for improvement.

Over enthusiasm: “This was so great that I want to do all my groups this way.”

Believe it or not, I have had many clients say, after the groups, that the telephone is the only way that they would do groups in the future. This is as ridiculous as saying that “I don't believe in telephone groups” (as if they are a religion). While I have no doubt that telephone focus groups are superior to face-to-face groups (See Special Report *Introduction to Telephone Focus Groups*) even my enthusiasm has some bounds. There are a lot of factors that go into the decision between telephone vs. face-to-face groups.

How to set up client interaction with you during the groups

Most likely, you will be moderating from your home or office. Clients can communicate with you by a variety of means:

- They can fax you notes. This is the best way, since it most closely resembles a note passed to you during a face-to-face session. It has the advantages of being in writing and in their exact words, so you can refer to it when you have a moment.
- You can also have an assistant with either an open line to the client, or a line on which the client calls when he/she has a comment. Your assistant can then write down the comment and pass it to you (or whisper in your ear).



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- You can have the clients press * 0 (Asterisk followed within 2 seconds by zero) on their telephone tone pad. Our assistant will then go onto the client line privately and send you a short note via your viewing screen. It should be less than about eight words, e.g., “Probe more on price.”

Setting up the post-session debriefing.

Unless asked to do otherwise, we will inform your clients as they call in that they should hang on at the end of the session for a debriefing. After the participants hang up, we will open up the lines of the clients and let you have a discussion with them. You are charged for these lines, so advise the clients to keep it short, and mainly concentrate on immediate issues of emphasis for the next group. You might want to suggest that interpretive issues be postponed unless they have a direct bearing on how you will conduct the next group, particularly if the next group is coming up in a few minutes, or later that same night.

Other issues

Confirming letters or faxes

As soon as someone agrees to participate, a confirming letter should go out from the recruiter by mail, overnight delivery or fax. See appendix for a sample confirming letter.

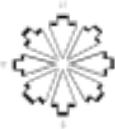
Confirming calls

Confirming calls should be placed a day before the session. If we recruit, we will do the recruiting, we will place the confirming calls. It's important how they are worded. See the appendix for an example. The important thing, in both confirming and pre-calls (see below) is that they be assumptive: they should assume that the participant is participating and that this is just to conform some details. They should also convey the idea that the respondent will enjoy the discussion. If you have someone else do the confirming calls, make sure that there is no wording like “I'm calling to remind you about your conference call on -----. Will you be participating.” (Don't call it a conference call and don't imply that it's OK that the person possibly won't be participating.)

If we didn't recruit, the people who recruited should do the confirming calls, following the above guidelines.

Pre-calls

We prefer to do the pre-call. This is a call about 15 minutes to a half hour before the session. It takes about 15 seconds to tell people about what they can expect when



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we call them, and to remind them to tell anyone who may be answering their phones to expect the call at the time of the session. We find that these calls increase the show-up rate, and prevent delay of the start of the session (often people have left a message for us to call at a different number).

It may seem like a confirming letter, confirming call the day before and a pre-call right before the session is too much and might be regarded as annoying by the participants. If done right, they are usually regarded as a sign of professionalism. Years of experience have taught us that these three contacts are necessary and well worth the rare complaint.

Setting up viewing screen with your computer, so that you can know who is talking during your session.

See the Appendix page 59 for directions for setting up the remote viewing screen.



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Setting up the teleconference.

Who calls whom

Usually, we will dial *out* to you and your **participants**.

Usually, your clients *dial us*. Usually, it's better to *have the clients call us* because it can be difficult to track them down due to traveling or last minute changes.

As the **clients** call in, they hear a recorded message greeting them. Then the technical assistant goes onto each line and greets the clients personally. Usually, the technical assistant reminds the client to stay on line at the end of the group for a debriefing session with you. The technical assistant then mutes the client's line so no sound can be heard. The client is put on hold, and hears music until the start of the conference.

Our technical assistant gets the moderator and the participants on line.

The same procedure as above is followed.

Each line is then individually checked prior to the group start up to make sure everything is OK and the participant is in fact on line with us.

It is possible for the clients and the moderator to have a pre conference discussion as the technical assistant gets the other participants on line. Just tell us you want this.

Signaling the technical assistant or moderator

The client is able to signal our technical assistant by pressing * 0 (asterisk then zero) on their telephones. They can use this function if they are having a problem, or to pass messages to the moderator. They can do this throughout the focus group. We generally advise clients to keep messages passed to the moderator short. Our technical assistant can pass the moderator a note from the client.

Of course, if the moderator is not on our premises, we cannot pass a note. The best way to handle this is to set up a communication channel between you and the client beforehand: a separate open line (you'll have to have an assistant monitoring the line), or have the client fax you notes.

We generally do not recommend that you moderate from our premises. There is a lot going on behind the scenes here, and you will be distracted. It also removes one of the main advantages of doing telephone focus groups: not having to travel.

On the other hand, you might want to consider going to the client's offices. You can then watch their faces during the group, and let them give you notes directly. It's like doing a group from the viewing room!



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Remote Viewing

The moderator can then dial into our conference system via a modem and see the screen of participants.

Setting this up requires a PC compatible computer, not a Mac.

A minimum baud rate of 2400 (9600 preferred) baud modem is also required.

We will send a simple software program to you free of charge and arrange a pre conference test. You can also use Crosstalk for Windows (highly recommended) or any other communication program that has terminal emulation for a Wyse 60 terminal. With Crosstalk for Windows, you can even put our conference system screen in a window and take notes in a word processor in another window!

The names of the participants appear on the screen and a little asterisk goes off in front of each name whenever that person speaks or even clears his/her throat.

This way, if two or three people start talking at the same time, the moderator can instantly know who it is and can sort them out.

When somebody clears their throat, the moderator knows that person is about to speak. The moderator might say, "John, you were about to say something?"

Also, a participant may call your name, and you can instantly reply by using their name. It's very personal. It gives the moderator an edge since participants think that he is really tuned into them.

Sometimes, the moderator may orient participants by telling them he/she is viewing a screen which indicates who is talking. Otherwise, they might get a little paranoid and wonder how you knew who was about to speak.

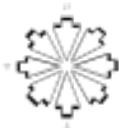
Pre conference check-in with the moderator

Immediately prior to starting the focus group the technical assistant talks to the moderator privately.

We'll tell you who is on line. The most efficient way is to tell you who is *missing* from your participant list. That way we only have to tell you one or two names instead of eight.

The technical assistant will continue to try to reach any latecomers even after the group starts, and then announce them into the group as he gets them. *If you don't want people introduced late, tell us, or give us a time beyond which you don't want latecomers.*

We can do a roll call when we start the group, but I strongly suggest that you do the roll call with the introductions. This establishes the relationship directly with you, rather than the participants having to engage in relating to an additional person.



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Headsets

I strongly recommend using a headset. Get a binaural (both ears) headset. Try it out before buying it (call us and we'll be happy to tell you how it sounds), and get a money back guarantee. Call us and we'll be glad to make arrangements for you to purchase the best headset.



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Starting the session

Note: An un-annotated version of the moderator's introduction follows this section.

Beginning the telephone focus group.

The **music is turned off** by the technician.

The music stopping is the signal for the moderator to **begin speaking**.

It's important to start by using a **good, loud, assertive voice**.

Usually I say *“Good evening, this is George Silverman from the Teleconference Network, can everybody hear me clearly?”*

Then I pause and I hear “yes, yes, yes.”

If someone says “no,” say that the technical assistant will talk to you privately and get you a better line.

Why I ask this seemingly stupid question

Participants need to get an immediate sense that they are a part of a group of other people on the telephone line. This is the reason I ask them if they hear me clearly. It gets them to respond immediately with a yes or no and to hear a bunch of other people.

It also establishes a comfort level. Everybody experiences firsthand that they can jump in and speak over the phone en mass and it will not cause chaos.

It also immediately expresses my concern for their comfort and that I am taking care of them.

It is important to keep your participants continually oriented.

They cannot see what is happening since they are on a telephone line.

They don't know whether there are fifty people or two people.

A moderator can use our remote viewing operation to keep themselves oriented. The technical assistant can also name prompt to assist the moderator who does use our remote viewing operation. This means that when a participant speaks without using his/her name, the assistant says, “That's -----.”

Again, it's important to use an assertive, confident voice to relay that you are hearing the participants and they are hearing you.



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Moderator's Introduction — Annotated

Here is a sample introduction that I use, with comments and explanations.

¹“Good evening, this is George Silverman from the Teleconference Network, can everybody hear me clearly? Let me introduce everyone who is on the line, to get you oriented. Then, I’ll introduce myself more fully and talk a bit more about the nature and purpose of the discussion. Then, we’ll get right into the fun, interactive discussion part of your session as quickly as possible. Forgive me for rushing, but let’s get through the introductions quickly. When I call off your name, why don’t you tell me the first name that you like to go by. The telephone’s a very informal medium, so let’s keep things very informal and go by first names. Also, please tell us the city and state that you’re in (geographical state, not psychological state).”

Always use first names, even if you are doing a session with very high level people.

I always use first names with physicians, even if they are famous. I also used first names with Fortune 100 presidents, Nobel Prize winning economists and US Congressmen. I’d probably ask God if she had a more familiar, less imposing name to go by.

In case...

You need to get some other pieces of information from your participants during the introduction, such as the size of their business, or number of patients they treat etc.

Try to keep it short

You can get this during the introduction, call on each of them in turn, or cycle back once they have given their names.

If somebody is not there, don’t panic,

The technical assistant will hear that.

He/she may already be trying to get somebody a better line, or trying to get them on line.

¹ See Page 42 for the complete opening, beginning to end, unannotated. It’s always good to have it with you in case you get distracted or thrown off during your opening.



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The participant may have gotten disconnected, and the assistant is in the process of calling them back.

Just say that your assistant is handling that and hopefully he'll be back on soon.

If somebody hangs up or is disconnected, the technical assistant will know that.

It is very rare.

Your assistant will immediately call that person back.

In the case that a participant has left intentionally, either the moderator or the technical assistant can say there is a problem with the line or the participant had to leave early.

After the participant introductions, the moderator introduces him/herself more fully.

Say who you are, and what name the participants use for you. First names create an informal and free atmosphere.

If you are able to reveal who the research is for, you can tell the participants who the sponsor is.

In any case, it's important to let them know that you are an independent third party and they can be frank with you.

This is also a good time to talk about what the purpose and flow of the discussion is.

Giving the participants tips and suggestions for participating

“For those of you who have never done this before, let me give you some tips and suggestions for getting the most out of the session. Whenever you have something to say, just jump right in and say it. Don't wait for me to call on you. You know when you have something to say, I don't. I can't see you sitting there with your mouth open, so please don't wait for me to call on you.”

Using first names

“When you do speak, whether it's a question or a comment, please say your name in the first sentence, so that people can respond to you. And I want to encourage you all to respond to each other as well as to me. Feel free to talk to each other: agree, disagree, expand on what other people say, and so forth, just as if we are in the same room together. That's why we're talking in a group instead of me interviewing you indi-



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vidually: to get your reactions to each other's comments and for you to build on each other's ideas.

I'd like to hear from as many people as possible on every topic we discuss, but no sense just repeating what someone else has said, so chorus's of "I agree" or "disagree", or "uh-huh", or "yeah", or "that's been my experience too", or "same here" are all helpful verbal cues, like a 'verbal head nod', since I can't see the you all nodding or shaking your heads."

I specifically ask participants to do this for me even though it occurs spontaneously. Asking tends to increase the interaction.

If somebody makes a comment and I don't hear anything, I usually refer back and say, *"Remember those verbal head nods? I don't hear anything, I don't know what the silence means. Are you are sitting there in stunned disbelief and total disagreement or are you sitting there with nothing to say, or does what was said jibe with your experience — so where are you?"*

This gives me the excuse to get them to verbalize things that they wouldn't ordinarily verbalize.

I like to turn the fact that I can't see their faces into an advantage.

There is a big advantage in their not seeing each other, since participants are much less intimidated. So what you lose in not being able to read facial expressions, you gain in the participants not worrying about *each other's* facial expressions.

I flaunt the fact that I can't see them. I use it as an excuse to probe, and to get them to verbalize.

Managing the interaction

To prevent any one person from dominating the discussion early on I give the ground rule about letting other participants speak.

I ask participants who find themselves speaking more than everyone else to hold back and give other people a chance.

An example of what I say is...

"If you notice that you're always the first person to answer my questions, then at the point at which you begin to notice that, hold back and don't be the first to answer my next question, so somebody else can be first so we can mix it up in different order and all that. If not my client



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and I don't know whether that one person's leading the whole group and everybody else is agreeing with them."

Playing Devil's Advocate

Sometimes I warn the participants that, **"I will from time to time play Devil's Advocate. Please understand that it is just one way of hearing your reactions, and I'm not being argumentative or contentious."**

Saying this up front can often allow you to get their reactions to controversial views, or objections to what they are saying without them taking offense.

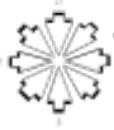
You can be much more confrontational or probe much deeper in telephone groups than you would dare in face-to-face groups, especially if you've warned participants beforehand. I will sometimes say, especially near the end of the session, things like, ***"Remember I said that I might play Devil's Advocate. This is one of those times. How would you answer someone who said that you are not a very informed physician if you are doing ... instead of ..., for these reasons...?"***

I don't do it often, and I try to avoid a confrontational style. My point here is that you should give yourself the possibility by setting it up in the introduction in case you want to do it. Remember, with the safety of the telephone, you might want to ask that question that is sticking in your throat because you are afraid to offend anyone by asking it. I've been pretty direct, and no one has hung up on me yet.

Call-waiting and other procedural issues

"If you have call-waiting or another line you have to answer, by all means do so. We'll all hear some clicks, but we'll ignore them. Please get back to us as soon as you can. If you're not sure what we are talking about when you get back, I'd rather that you interrupted the discussion and let me take 5 seconds to summarize for you, so that you are not sitting there scratching your head wondering about what we're talking about and depriving us of your participation."

I'm telling them that their participation is so important that I'd rather interrupt the discussion to bring them into it. Actually, they rarely interrupt, and even more rarely answer call-waiting. But they need to be told what to do when they get the call-waiting signal, the other participants need to know what the occasional clicks are all about, and they should be told that their participation is important.



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Expressing opinions even if there is disagreement.

I reassure the participants that they do not need to agree, that I'm after a full range of opinion, and as many perspectives on the different issues that I can get.

“As I said, I'd like to hear from everybody on all issues. It's important for you to express your views, especially if you are the only one who holds a particular view or has a particular set of experiences. I need the full range of opinions and experiences, not consensus.”

Calling for questions after the introduction and the groundrules have been set.

It's a good idea to stop here and call for questions.

I usually say, *“Are there any questions about what we are doing, why we are doing it, or how we are doing it?”*

Very rarely is there one, but if there is, it needs to be brought out and handled.

Tape recording

Toward the end of the introduction I inform the participants that the session is being taped.

An example of how I say it is, [as if I've forgotten] *“Oh, one last thing, a legal technicality. We will be recording tonight's discussion. It will not be used for any kind of promotional purposes, it is strictly to allow me to re-listen to the tape and take notes later, rather than during the group, so I can pay attention to you.”*



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The Entire Moderator's Introduction — Unannotated

The script

Note: Here's the entire moderator's opening. It's good to have it with you in case you are distracted or otherwise thrown off. However, as you've no doubt discovered in face to face groups, it's better not to memorize it, or read it, because it will sound rote and, therefore, not genuine. I re-create it each time, with hesitations and even comments like, "Let's see now, did I cover everything? Oh, I forgot about call waiting ..."

"Good evening, this George Silverman from the Teleconference Network, can everybody hear me clearly?... Let me introduce everyone who's on the line, to get you oriented . Then, I'll introduce myself more fully and talk a bit more about the nature and purpose of the discussion. Then, we'll get right into the fun, interactive discussion part of your session as quickly as possible. Forgive me for rushing, but let's get through the introductions quickly . When I call off your name, why don't you tell me the first name that you like to go by. The telephone's a very informal medium, so let's keep things very informal and go by first names. Also, please tell us the city and state that you're in (geographical state, not psychological state).

"Joseph Jones?..."

"For those of you who have never done this before, let me give you some tips and suggestions for getting the most out of the session. Whenever you have something to say, just jump right in and say it, don't wait for me to call on you. You know when you have something to say, I don't. I can't see you sitting there with your mouth open, so please don't wait for me to call on you.

"When you do speak, whether it's a question or a comment, please say your name in the first sentence, so that people can respond to you. And I want to encourage you all to respond to each other as well as to me. Feel free to talk to each other: agree, disagree, expand on what other people say, and so forth, just as if we are in the same room together. That's why we're talking in a group instead of me interviewing you individually: to get your reactions to each other's comments and for you to build in each other's ideas.

"I'd like to hear from as many people as possible on every topic we discuss, but no sense just repeating what someone else has said, so chorus's of "I agree" or



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“disagree”, or “uh-huh”, or “yeah”, or “that’s been my experience too”, or “same here” are all helpful verbal cues, especially since I can’t see the you all nodding or shaking your heads.

“If you notice that you’re always the first person to answer my questions, then at the point at which you begin to notice that, hold back and don’t be the first to answer my next question, so somebody else can be first so we can mix it up in different order and all that. If not, my client and I don’t know whether that one person’s leading the whole group and everybody else is agreeing with him or her.

“I will from time to time play Devils Advocate. Please understand that it is just one way of hearing your reactions, and I’m not being argumentative or contentious.

“If you have Call Waiting or another line you have to answer, by all means do so. We’ll all hear some clicks, but we’ll ignore them. Please get back to us as soon as you can. If you’re not sure what we are talking about when you get back, I’d rather that you interrupted the discussion and let me take 5 seconds to summarize for you, so that you are not sitting there scratching your head wondering about what we’re talking about and depriving us of your participation.

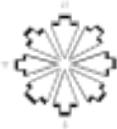
“As I said, I’d like to hear from everybody on all issues. It’s important for you to express your views, especially if you are the only one who holds a particular view or has a particular set of experiences. I need the full range of opinions and experiences, not consensus.

“Are there any questions about what we are doing, why we are doing it, or how we are doing it?”

“Oh, one last thing, a legal technicality. We will be recording tonight’s discussion. It will not be used for any kind of promotional purposes, it is strictly to allow me to re-listen to the tape and take notes later, rather than during the group, so I can pay attention to you.”

“OK, let’s get to the INTERACTIVE part of the discussion. I’ll will ask you some rather general questions first, and then I’ll focus in a little bit more specifically later on.”

“The first question that I want to ask you and then I’m going to sit back and listen to you folks discuss it among yourselves is...”



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Comments

OK, I know it's long. I used to give a very short intro. I have found over the years that, while the phone is a familiar instrument that makes respondents feel comfortable, they are unsure about what is going to happen. They need a short period of time to hear what is expected of them, and to size up the moderator. Every once in a while, a client forces me to use a shorter intro, and invariably the interaction suffers.

Feel free to change anything, but I have included my thinking about each section so that you can make changes with full knowledge of why the words are in there in the first place.

Please share with me any improvements that you discover that would make the intro shorter, more friendlier, clearer, seamless, etc.



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The dynamics of telephone focus groups

Getting into the interactive part of the discussion.

At this point, I want to flag that we are changing modes, so I'll say something like, ***“OK, let's get to the INTERACTIVE part of the discussion. I'll will ask you some rather general questions first, and then I'll focus in a little bit more specifically later on.”***

For example... “The first question that I want to ask you and then I'm going to sit back and listen to you folks discuss it among yourselves is...”

It's important to note that I have told the participants in three or four different ways in that brief amount of time, that there is going to be a discussion, they shouldn't wait for me to call on them, I'm not running it anymore, I'm just going to toss out a question, and they are going to take over. Then I ask the first question.

The first question

I generally do not believe in warm-up questions on the phone. People open up so fast in the phone that it's really unnecessary.

Ask the question that is psychologically first. It may or may not be logically first. Ask the thing you need to ask first.

So ask your first question, and again say, “Let me sit back while you discuss it, jump right in whenever you want to, use your first name.”

Then sit back, take a deep breath.

Several things may happen. You may get a long pause.

Believe me, that pause is longer to you than it is to them. They are thinking, you are sweating.

Though the pause is interminable to you, the participants don't even notice it.

A long, ongoing pause happens very rarely, about one out of one hundred times.

Most of the time the participants will instantly jump in.

In a face to face group, you sometimes get a bunch of people sitting around looking at each other saying, “Who's going to go first?”

This almost never happens on the telephone because sitting on a quiet telephone line is an extremely aversive experience. Most people will not tolerate silence for more than a second or two without talking.

The telephone is like a magnet. It will draw people out.



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Also, it sounds very personal because the voice is coming directly into their ear, they think you are talking directly to them. So, they will jump in.

In the case they don't, just slowly take a few deep breaths, realize that it's way longer to you than it is to them, and then somebody will jump in. (Back in the days when I smoked a pipe, I used to light it immediately after asking the first question. Sometimes I would even tell them that I was lighting my pipe and was going to sit back for a few minutes. If it ever went out, I knew I was talking too much!)

I can wait out anybody, they will definitely jump in.

If the silence is ABSOLUTELY INTOLERABLE, then simply say, *“Again, I'm going to sit back and give you chance to think, don't forget to use your first name when you speak.”* That is all it takes. Somebody will speak.

The most critical part in the group is what happens after the first person speaks.

The big mistake made by most moderators is they jump right in after the first person has spoken. The worst thing to say is, “That was great” or something like that, because it implies that it was great and the next remark may not be so great.

Any acknowledgment, or anything else at that point has the same negative effect on the dynamics.

I just wait, since I've already established that I was going to do that.

Somebody will jump in, and then you have a discussion going. You've broken the pattern of you, them, you, them.

In a face to face group, I look around the room expectantly for the next person to talk. I don't say thank you for talking or that was great or how interesting, or anything like that. I may nod in acknowledgment.

On the phone I may say, “uh-huh.”

It is best to stay silent, and then somebody else will jump in. Then you can do almost anything because they will have established the pattern of talking to one another and being heard.

Remember to get the panel to use their names in the beginning.

They tend to forget.

Just break in and say, *“Who is that? Let me remind you again to use your first name.”* They'll say “Oh, this is Joe.”

If you don't want to track who said what or don't care, it doesn't matter. However, it is better for the interaction, so I enforce it.

Calling on participants.

I usually reserve the option to call on participants.



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I may say something like, “Let’s hear from several people on this.”

After ten minutes or so, if somebody still hasn’t talked, then I nail them. I say, “Joe, we haven’t heard from you yet.”

I have a theory that the person who hasn’t talked in the group or the person who talks last is either the smartest person in the group or the dumbest person in the group and you better find out which it is. If it is the smartest person, or the most informed person in the group, and they are waiting for a personal invitation, then you had better give them one, because you want their participation.



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Troubleshooting

If you can't hear somebody well, **our technical assistant also knows it and has turned up the person's volume.**

So you can assume that the person is at the maximum volume from our end.

So if the volume is low, the person is almost certainly dropping their phone below their chin or they are not speaking loudly enough.

The best thing to do is simply say, "**Louder, Joe.**"

No preliminaries, no "Excuse me, Joe, may I ask you to speak a little louder?" Just say "**Louder.**"

If you have to say it repeatedly, say, "John, can you speak a little louder, or a little more directly into your phone."

The important thing from a group dynamics perspective, though, is to make sure that you don't let a problem go on too long.

If you can't hear somebody, say "Louder, Joe."

If you don't, each person will think it is their line and then you will have everybody saying "I can't hear, I can't hear, there is a problem on my line."

It is not them, it is the person speaking. When you find out which line it is (the one where the voice is soft, or words are dropping out) tell the person, "I'm really sorry, I may have to ask the assistant to go in on your line privately and get you a better line." The assistant will take care of it.

Instantly it will sound better.

You may have to remind that person a few times especially if they have a very soft voice.

If you are hearing a buzz or a hum, it's almost certainly a cordless phone.

You can ask the participant if they can switch onto a regular phone.

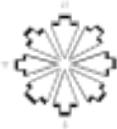
It's better for the moderator not to use a cordless phone or a speaker phone.

Sometimes, the assistant may have to go on that line privately and ask the participant to switch phones

Call on the technical assistant anytime. He/she will be monitoring the session.

If he/she doesn't respond to you right away, it means they are working technically behind the scenes or getting someone a better line.

But they will hear you on a speaker in our control room, they will know who it is.



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Or, you can just call them by name or ask for the technical assistant to come on line. As a last resort, dial * 0 (Asterisk then zero on a touch-tone phone).

If there is a problem, the assistant knows who's line it is and may take them off to get them a better line.

He will try to keep you informed about what is happening, but if he has to grab somebody off the line fast, he might not have time to get into your conference to tell you what is happening.

These are all very rare occurrences.



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Conducting the sessions: Other issues

Projective techniques on the phone

Obviously you can't have the participants draw pictures, or do other projective techniques that require visuals. But you can often do guided fantasies, role playing, and other techniques that aren't visually dependent *better* on the phone than face to face, because people aren't as threatened.

People will close their eyes comfortably on the phone, and they are a little uncomfortable doing that together with other people in a room. It's a kind of primitive fear closing their eyes in the presence of other people. But on the phone it's great. Some things work a little better on the phone and some things don't work as well.

Stimulus materials

You can mail, fax or "overnight" materials, as appropriate. In addition to written materials, you can send audio or videotapes, photos, etc. I often ask people to show them to colleagues, and get their opinions also. Just like the real world. Of course, if you want people to react to concept statements without deliberation, you can put them in separate numbered envelopes with a label on each, "Please do not open until asked to do so by the moderator during your discussion group."

We have had pizzas delivered to respondents and asked them to serve them to their families for dinner. The homemakers then got on a telephone group and critiqued the pizza. We even had them put their husbands on, then their children.

We have sent other prototypes and/or actual products. Before the launch of the Trac II razor, at a time when there were only nine in existence, they were sent out to men all over the country. They were inarticulate about how to describe the razor when they were called for individual interviews. We put them on a telephone focus group and were able to bring out a coherent description through the interaction.

We have sent high-level executives materials in a small metal box with a combination lock. They were told that they would be given the combination during the session and they were free to keep the box. The show-up rate was very high.

Using the invisibility to your advantage to draw people out and interpret their reactions.

Obviously, you can't see the participants. Don't hide this fact or gloss over it. Emphasize it to your advantage. Sometimes, I say, "I can't see you all nodding or shaking your heads. Do you agree or disagree with what Harry just said?" Or, I'll take an electronic poll. Or, I might say, "I can't see you, so I can't see the expressions on your faces and can't tell why the energy level just went down. What happened?"



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Ask people direct emotional questions, like “How do you feel about that? What’s the expression on your face?” Or, “I seem to be hearing [emotion]. If that [feeling] were to talk to me, what would it say?”

There are many ways to draw people out that you use already. Most of them can be translated into telephone focus groups. The important thing to remember is to acknowledge what is happening, rather than ignore it.

Listening for non-verbals

As you become more adept at telephone focus groups, you will find yourself listening more and more for the non-visual non-verbals. Instead of facial expressions, gestures and body language, you will listen more for nuances in tone of voice, choice of vocabulary, pitch level, number and kind of hesitations, rate of speed, trailing off or picking up of volume, and many other speech subtleties. Also listen for what I call “verbal gestures,” such as “Uh-huh,” “Nah,” and the like. Also, beyond the voices, you will listen for changes in the pace of the session, how fast people jump in spontaneously, how much they ask questions and react to each other, laughter, sarcasm, jokes (“Many a true word were said in jest” may be a cliché, but it’s true), silences and pregnant pauses.

On your screen, you will be able to see the asterisks next to people’s names go off when they sigh, grunt, groan, or even clear their throats. You can often pick up things that you would never be able to hear of you were in the same room with them, because their microphones are less than an inch from their mouths.

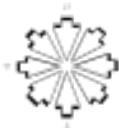
Of course, it helps to ask them for non-verbals. Tell them that you want to hear a chorus of grunts, groans or “Yep,” “I agree” and so on.

Telephone tricks that you can’t do in a face-to-face group

You can be more secure in the knowledge that the technical assistant can remove any participant from the group without the group knowing it at the time. I’ve only had to do this twice in 25+ years, both with physicians who were so incoherent and irrational that they could not be handled any other way.

The technical assistant can also remove a dominator and say, “We notice that you seem more knowledgeable about the subject under discussion, and the moderator has asked me to ask you to hold back and let other people be the first to answer the questions (or have more of a chance to talk), since we need the full range of opinions.” Our assistants are trained to do this, although it is very rarely needed, since the moderator can usually handle these situations.

You can break the group up temporarily into dyads, triads or into two groups such as users and non-users. You can let them discuss their positions, or generate ideas, then instantly merge them into the full group again. I often ask users to try to convince non-users to try the product, thereby researching real-life word of mouth.



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Electronic Polling

You can take an electronic poll. If you are using the remote viewing screen, we can teach you to set the conference system so that you can ask the participants to rate something on a scale of 1-9. They push their touch-tone buttons on their phones to indicate their choice. You instantly see the votes of each participant. You can then ask people to explain their preferences.



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After the groups

Tapes

You will receive 2 copies of tapes of each group via regular mail or overnight delivery (for an additional charge) either next day or two business days after the session. If you need more, or need one sent directly to the client, let us know. If you need the tape right away, tape from your phone also. That way you will have it right after each session. (Don't use suction-cup microphone. Go to any electronics store, such as Radio Shack, and get a hard wire telephone recording jack that plugs into your telephone between the handset and the body of the phone. It will even work on multi-line phones.)

I strongly recommend that you purchase a VSC (Variable Speech Control) tape recorder. They are available from Radio Shack, or the same model is available in the GE brand from Service Merchandise and similar stores. It allows you to speed up the tape continuously up to twice the speed, *without a correspondingly higher pitch*. After a while you will be able to listen to your groups at least at 1.5 speed and even 2.0 speed with slower-talking people. It's the best \$100 you will ever spend. The VSC tape recorder has nothing to do with telephone groups per se, but I thought I'd throw it in because it's so valuable.

What *does* have to do with telephone focus groups, however, is the quality of the tape. You'll be amazed at how clear they are. The microphones are right at everyone's mouths, so you don't hear the kind of extraneous noise that you hear in face-to-face group tapes. They are very suitable for making excerpt tapes for presentations.

If you have enforced the rule that participants use their names when they speak, you will have a tape on which you can identify who has said what, in contrast to face-to-face tapes. This makes tracking opinion change easier.

Some additional considerations about transcripts and tapes

Problems about transcripts and some suggestions about how to avoid them.

Transcripts tend to be misleading, since almost all non-verbals are left out. It helps if you boldface important comments, and even insert your own editorial comments, such as, "Said with irony. Participant actually meant the opposite of the words spoken."

How to get clients to actually read transcripts and listen to tapes.

Since the tapes of telephone groups are much more clear, the transcripts tend to be better. We use outside transcript services, and get them back via computer modem.



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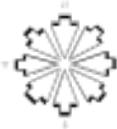
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We then set them in three column, single-spaced, 10 point Times Roman type, much like a newspaper. We'll even sometimes put in a masthead, like a newspaper. Usually, people make the mistake of typing transcripts in 12 point Courier, double spaced. The way we do it reduces it from 50 pages to about 10-15. This makes it much more likely to be read by busy executives.

Transcripts are great for people who have already heard the groups. But encourage clients who have not heard the group to listen to the tapes. Be sure to point out that the tapes of telephone groups are very easy to listen to (dramatically higher audio quality) and easy to follow (because of the use of names). Face-to-face tapes are torture unless you mike every respondent.



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Appendix



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Invitation Guide (not script)

Note: this is a general guide only. The people doing our inviting have years of experience inviting high level people to focus groups. It must be done interactively, so only a general indication can be given of the wording.

I'm calling to invite you to participate in a nationwide group discussion of -----
----- . It will take place by *telephone conference*, so that you don't
have to travel anywhere. You'll have the opportunity to exchange ideas with other ----
----- people from ----- across the country. We'll be discussing such
topics as:

The research is being sponsored by ----- . They want to learn about
what improvements you want in the industry, how they can serve customers better,
etc (list things that are beneficial to the respondent). From your point of view, you'll
have an opportunity to compare experiences, share ideas and listen to other people's
ideas in this area. The discussion will take a little over an hour and will be very in-
formal. [Enthusiastically] I'm sure that you'll get a lot out of the discussion, and have
a lot of fun doing it. Can you make it on [date] at [their local time]?



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Example of Salesperson Memo/Voice Mail Invitation For Telephone Focus Group

[Note: this is a sample of an invitation that can be sent to salespeople, product managers, or other employees to invite them to participate in a focus group]

We are very eager to get feedback on how we can better support your sales efforts. In order to do this, we will be conducting several *telephone group discussions* among [salespeople]. You are one of the people who are being invited to participate in the discussion. Your participation is entirely voluntary.

We'll talk about the present situation, suggestions, current problems, specific concerns, how the home office can better support your efforts, etc.

We'll have a very informal discussion. You can participate from **any** phone, and you will be in a group discussion with about 9 other people from several [countries, regions, etc.]. The discussion will last for a little over an hour.

The discussion will be moderated by -----, who is an independent, third party — not an employee of ----- . [He, she] will be writing a report which will include your criticisms and suggestions. Management will not be listening in either live or by tape. The report will respect your confidentiality and will not attribute remarks to any particular individual or geographical location.

Your discussion will take place on: (Give dates) specify Eastern Time

Day, Date, Time **PM**

Please call ----- at [800 #] (leave a message on the machine if you are calling out of ordinary business hours) **today** between 9:00 am and 5:00 PM Eastern Time (US) to confirm your participation and for details on participating.

On your scheduled date and time, please promptly place a **credit card call** or a **standard direct dial** telephone call to The Teleconference Network. The number is **914-365-5000**.

We greatly appreciate your cooperation.



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Sample Confirming Letter

Dear :

This letter will confirm your participation in your session on (put in the topic name here). Your session will take place on: **Monday, February 7th, 199- at 8:00 PM ET(or 9:30 PM ET) Eastern Time (Please adjust for your local time zone.) Our records indicate that this is (put in their time zone) AM your time.**

The session will last a little over an hour and will take the form of an informal, interactive discussion group with approximately seven other participants. You will be called at the above time at the following phone number: _____ (insert their telephone number of where they will be taking the call).

Please be sure this day and time are in your appointment book. If there is a change in the phone number that you would like us to call, please call us at (put in your phone number.)

At the time of the session, you will receive a phone call with a recorded message, which will ask you to press "1" on your touch-tone phone (or wait if you do not have a touch-tone phone.). The technical assistant will welcome you and check your phone line, then turn the discussion over to the moderator. The moderator will have everyone introduce himself/herself, and start the discussion. (If for some reason you do not hear from us by five minutes past the scheduled conference time, please telephone us at 800-669-8255.)

The enclosed materials will further explain what to expect and what you will get out of participating.

There will be a completely open exchange of information between the participants. While we will be making a recording of the discussion, the tape is for note-taking and quality control purposes only and will not be used for promotional purposes.

I'm sure that you will enjoy this interactive discussion with your colleagues across the country. (If sending honorarium) In addition, we will be sending you an honorarium of \$--.00 as an expression of our appreciation.

Cordially,



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Remote Viewing Instructions for Moderator

The remote viewing screen allows you to dial into our conference system through an IBM PC (not Apple) compatible computer with a modem (minimum 2400 baud). You will need separate computer and audio phone lines. Here are the directions to do this.

1. Create the directory c:\linxemu
2. Copy files from the diskette onto your hard drive, **linxemu** subdirectory (please return diskette to us.)
3. Go to directory linxemu by typing: **cd linxemu**
4. Then type: **linxemu**

This will open the Main Menu (see next page)

If you have to change the current settings, use your arrow keys to highlight SETUP and hit return. Use your arrow keys to change settings and hit return when completed. Hit Y for save settings. If you have a 9600 baud modem, definitely change the settings to 9600.



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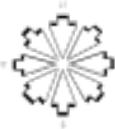
EMULATE RECORD PLAYBACK SETUP HELP

Current Settings

Terminal - WYSE 60
Communications Port - Com 1
Interrupt Request - IRQ 4
Baud Rate - 2400
Printer Output - None

Control C - Returns to DOS

5. The word Emulate is highlighted - hit return
6. You will see a blank screen.
7. Type ATDT (space) 19143650169 and hit return
8. When you see **Connect 2400 (or 9600)**. Hit return.
9. Wait for a second and you should see the word: **Password**
10. Type in the password: **(To be given at the time of your remote test)** and hit return (No need for caps.)
11. Wait a second or two and hit the #1 key.
12. You will then be able to see the remote screen.



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Dialing into your Telephone Focus Group

(For your clients)

[Note: this is sent to clients prior to dialing into their groups. Feel free to adapt it to your situations.]

For dates and times of your session(s), please see separate schedule. Please make sure that you take into account the differences in time zones between Eastern time and whatever time zone you are calling from.

- 1 Place a call to 914-365-5000**, about three minutes before the time of the session. Use whatever standard method you usually use for long distance calls (direct dial, credit card, etc. depending on the policy of your company). If you are dialing from home, you may have to submit the bill to your company.

A technical assistant will be on your line privately at the earliest possible time to greet you and make sure your line is OK. Please understand that we are getting the respondents on the line, checking line quality and tracking people down who have decided to take the call at another location. Our technical assistants may be handling as many as 15 or more calls at the same time (participants plus insiders), so please be patient.

- 2** You will then hear either music or the focus group itself (if it has already started. The **participants and your colleagues will not be able to hear you** (we call it an “audio one-way mirror”.) Your dogs, children, or **spouses** cannot be heard. Feel free to chop wood, do the dishes, or cheer at the wonderful job the moderator is doing.
- 3 If you want to summon the assistant**, to get a note passed to the moderator, or if you have to leave early, press * **0** (Asterisk then Zero, not letter O, within 2 seconds of each other) on your touch tone phone. As soon as the assistant is able, he or she will remove you from the conference and talk with you privately. If you don't have a touch tone phone, or if your phone is set to dial pulse, you will have to hang up and dial back in. If you want a note passed to the moderator, **please be brief and clear**, so that the assistant (who is probably unfamiliar with the content of your conference) can write it quickly and the moderator can read it with minimum distraction. If you prefer, you can make arrangements with your client to fax them directly, or fax to us at 914-365-0122. The moderator might not ask your question immediately, or may approach your issue in a roundabout way.
- 4 If you want to talk privately with one or more of your colleagues**, summon the assistant by pressing * **0** (Asterisk then Zero, not letter O) and request a private conference with your colleague(s). Keep in mind, of course, that you will be missing part of the respondents' discussion. If absolutely necessary, you can also request that the



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moderator join your private conference. The moderator will have to excuse himself/herself from the respondents and join you.

- 5 It is possible to take polls.** The moderator can ask the participants to rate or rank something on a scale off 1-9 or answer a question yes or no. They do so by using the touch tone pads on their phones, so that they are unaware of each others' answers. Please keep in mind that these numbers are not projectable to larger populations, but are being used by the moderator to assess people's opinions before they have a chance to influence each other during the discussion. You can request a poll by summoning the assistant (* 0), but try to keep requests to a minimum, since it can disturb the group dynamics. Usually, this should be set up ahead of time with your moderator.

For those of you more technically oriented, or just curious: you will be participating over what is probably the highest quality telephone conference system in the world. As many as 5 people can be heard at once (duplex), so that you can hear the ambiance - the "uh-huh's," throat clearing, etc. You can also sometimes hear a little more background noise than a voice-blocked system (where only one person can be heard at a time), but it is a small price to pay to hear whether the group is agreeing or not, or whether another participant is trying to break in. The moderator is sitting in front of a computer terminal. Any time a participant speaks, or even clears his/her throat to speak, the moderator can see an asterisk blink next to that participant's name. If several people try to talk at once, the moderator can see who they are, and sort it out with a statement like, "Bob, Carol, Ted and Alice were all trying to talk at once. Ted was first, so go ahead and we'll hear from the others in a moment."

The unusually high fidelity and loudness you experience is because we do not use ordinary telephone lines. We use broad bandwidth digital fiber optic lines (usually used only by high-speed computer modems) from our offices to the participant's central office. You will notice an unusual lack of noise, and an ease of listening that is better than regular phone calls, and certainly better than your usual business conference calls. (We have clients run conference calls during the day, so if you're interested, let us know. You can even dial a code to make your conference calls completely confidential, so that our operators cannot listen in! Just ask about our security conference calls.)

If you can't hear a participant, please be patient. The assistant hears the problem too and will be making all possible adjustments.

At the end of the session, you have the option to stay on the line, so that you can hold a debriefing.



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Tips for getting the most out of your upcoming telephone discussion group (Tips for participants)

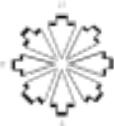
[Note: this is sent to participants before their group. Feel free to adapt it to your situations.]

The purpose of market research discussion groups is to understand your needs, satisfactions, dissatisfactions and considerations when you are deciding whether to use — and how to use — various products and services. By participating in market research, you are helping yourself by helping manufacturers meet your needs better. Everyone wins. Many of the most useful medications, devices and educational materials have been designed and/or improved as a direct result of inputs from people like yourself in group sessions.

Interaction is the key to getting the most out of the session. The reason that these sessions take the form of a group discussion, rather than an individual interview, is that the interaction between participants will stimulate ideas and remind you of thoughts that you would not have had in direct response to an interviewer. In fact, participants often ask each other key questions which an interviewer would not think to ask. Participants also get a chance to learn from each others' experience, and to confirm how others are facing the same situations and challenges that they are.

The following guidelines will make the interaction more productive:

1. **Talk with the other participants**, not just the moderator. Don't hesitate to ask questions of each other, share ideas, build on each other's ideas or disagree with each other.
2. **Don't wait for the moderator to call on you.** He or she does not know whether you have something to say. You do. So just jump right in and say it.
3. When you do speak, please use your name -- first name is suggested for informality and anonymity. If you are responding to someone else's remark, it is helpful to acknowledge that person, so that it is easier to follow what you are saying. For instance, "I just want to build on Harry's idea, this is Joe." Or, "This is Mary, and I haven't had the same experience as Bill."



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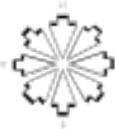
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4. We do not have to reach consensus. **If you disagree, please express that disagreement**, even if you are the only one in the group who feels that way. Chances are that you represent a much larger number of people in the marketplace who feel the same way, but who just don't happen to be in your session. It is crucial for the moderator to understand your position, so that he does not mislead the client into thinking that there is consensus on a given point. Some people mistakenly think that they will be "spoiling things" if they are the one person expressing a divergent opinion. If there is disagreement, the moderator's job will be to clarify the nature of the differences, and what might resolve them, but usually there isn't time to resolve them in the session.
5. Since no one can see you nodding or shaking your head, no one knows whether you agree with the last speaker or disagree. So, a short chorus of "I agree," "I disagree," "Nah," "Yeah," "Uuh huh," will be helpful in understanding whether or not someone is speaking for the whole group.
6. Sometime before the session starts, **tap the mouthpiece of your phone two or three times on a hard surface** like a table to loosen the carbon granules in the microphone. This will usually double your volume. Please speak loudly and directly into your phone. If you can't hear, tell the moderator so that we can turn your volume up or get you a better line.
7. Sometimes people are reluctant to offer unrefined opinions, hunches, speculations, feelings or wild ideas. Yet, these often prove to be the most valuable, because at their root are important, unexpressed, new ideas which can be developed into new insights and feasible product ideas. So, please offer it, and label it a hunch, speculation or a wild idea, etc. No one will then press you to justify it.



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