Ten Keys to Defusing Political Land Mines in the Back Room

By Bruce Crandall

Focus groups are rarely predictable. Sometimes groups know embarrassingly little about a given topic. Some groups talk too much. Others hardly talk at all. Some respondents dominate the discussion. Others can barely put sentences together.

Experienced moderators know the scenarios well. They also know that the discussion taking place by clients behind the one-way mirror can often spell success or failure. Very often a moderator's success may have less to do with how well he or she covers an assigned topic or controls the flow of a discussion than with intrigue and misconceptions in the observation room. How a moderator prepares for political contingencies in the back room is a critical, though often overlooked, variable in his or her success.

Political skirmishes in the back room are most likely to occur when client observers are:

A. Not adequately briefed or consulted before a group begins.

B. Large in number (including observers from competing divisions within the client's company).

C. Made up of executives from competing research companies or advertising agencies .

D. Inexperienced focus group viewers.

One experience is a case in point: Some time ago, an associate had been given the assignment to observe two focus groups. The moderator would conduct both groups, while the associate would sit in the back room with the client and other observers to answer questions and take notes. Since the moderator had reviewed the project with her client several times (including the study objectives, discussion guide, and the expected outcomes of the project), she anticipated that the groups would be similar to others her firm had conducted for them. This time was different, however.

For one thing, the client wasn't certain as to which other observers would show up, exactly how many to expect, or when to expect them. After the first group had begun, the client and the other observers trickled into the back room: marketing managers, sales and promotion directors, product-line managers, and advertising executives. As they finally settled in to observe the group, the back room formed several factions, each reacting independently of the others. Many seemed to be hearing news from respondents that did not go over well. The client took the last available seat next to an agency executive.

Halfway through the group, after huddling with the agency executive, the client suddenly became impatient with the flow of the discussion and requested that the research firm change moderators. This seemed like a curious request, especially since the moderator had apparently been covering all of the assigned topics. Over the moderator's objections, the client demanded a new moderator for the next session.

The second group turned out surprisingly well from a research perspective, given the circumstances. However, the research was secondary. The experience was more about survival, about contingencies. The moral is: Back room politics can not only damage your credibility as a researcher, but can seriously undermine your relationship with your client as well.

The question is, "how can a moderator not only survive in similar situations, but prevent back room land mines from exploding in the first place?" Although there are no foolproof methods, here are a few simple suggestions to help moderators better prepare for intrigue in the observation room.

Find Out Who Will Observe the Focus Groups

Confirm with your client as early as possible who will attend the group. Sometimes clients themselves don't know which observers will attend until the last minute, but usually they at least have an idea. If possible, limit the number of observers. The larger the group of observers, the more difficult it is to manage them. Also find out the role of the observers within their companies, and review the study objectives again to assess which departments might be impacted the most by the research results.

Arrange for an Associate to Manage the Back Room

Whenever possible, the moderator should arrange to have at least one associate (depending on the number of observers attending) in the observation room. The associate should be well briefed on the study objectives, discussion topics, and the key observers or "power brokers" attending the group. The associate should also have experience moderating focus groups. After all, you never know (as in the case related earlier) when an observer will be called on to moderate.

Meet With the Client in Advance

During the initial planning stages of a qualitative project, the moderator should have already developed the discussion guide and reviewed the focus group mechanics with his or her client by phone or in person. Before the start of the first focus group, the moderator should schedule a meeting with the client. The moderator should meet with the client, ideally, several days before the first group is scheduled, to confirm the most important points to cover in the discussion guide, as well as those points of secondary interest (i.e., discussion topics that can be eliminated if time runs out). The moderator should tell the client that she plans to conduct the groups and should inform the client about the group mechanics like introduction, discussion rules, open-ended discussion flow, the moderator's final return to the back room before the discussion's end, and so forth. No matter how many times a client has observed focus groups, it's important to review the role that the moderator will play before each group or series of groups. Most good moderators strive to be nonthreatening and nondirective during the first half of the group. If the client is accustomed to a more aggressive style, he may become impatient with the group's pace and the wandering discussion early in the session.

Additionally, a meeting the night before (perhaps over dinner) or an early morning meeting the day of the groups is a good way to review again with the client how you plan to conduct the groups. A dinner or breakfast meeting between a moderator and client can also help solidify their working relationship. This can be invaluable later on when back room politicos are jockeying for position.

Frequently, however, it's not possible to schedule an early meeting. The next best arrangement is to meet with the client and other observers (if possible) at least two hours before the start of the first group to go over the same types of details. This is also the time to answer any last-minute questions, so that there will be no surprises once the group has begun. Such consultation will instill a sense of confidence in the client (and the moderator), since the client and other observers have the opportunity to provide input. Despite the need to be flexible, the moderator should not stray too far from the latest draft of the discussion guide, agreed upon prior to the group. Some executives are prone to last-minute suggestions that can wreck the planned flow of a group discussion.

Sometimes, however, despite the moderator's best efforts, observers will simply arrive late. When a client and other observers arrive late, it then becomes the associate's responsibility to brief the back room before they settle down to watch.

Arrive Early at the Facility

Always call ahead for directions, so that you don't waste time hunting for the focus group facility. Plan to arrive at least two hours before the start of the first group. This way, the moderator and associate can go over last-minute details to ensure that they have all the materials needed before the client and other observers arrive. An early arrival also gives the moderator time to review notes and the discussion guide, to mentally prepare, and to instill confidence that things are in order.

Have All Presentation Materials Finalized and Ready

The moderator should always provide the client and other observers with copies of the discussion guide, so that everyone can follow the discussion on paper. If the moderator is presenting concepts or bringing materials to show respondents, he or she should have all creative (i.e., storyboards, videos, mock-ups, etc.) in his or her possession and should clearly understand how to present the materials before arriving at the focus group facility.

Check Screening Questionnaires and Weed Out Unqualified Respondents

Review the respondent lists with the client prior to the start of a group to verify the number of respondents who have arrived and to check the demographic makeup of the group. Screen out respondents when there's an overabundance of a particular type of attendee (e.g., too many seniors or too many females) and retain those who can "balance" the group. Sometimes, however, a "qualified" respondent survives the initial screening process, but is later discovered to be "unqualified" (e.g., a current or former employee of the client's company or industry) after the focus group has begun. Unfortunately, some respondents fall through the cracks, while others simply don't tell the truth.

If possible, it's better to let the unqualified respondent remain in the group, so that the discussion won't be disrupted. The expulsion of an unqualified respondent can inhibit the other respondents from freely voicing their opinions. Sometimes, however, when a moderator believes that an unqualified respondent's remarks are damaging to the overall results of the group, the respondent should be discreetly removed, so that the balance of the discussion will be as unbiased as possible. For example, the moderator may, under some pretense, excuse himself from the group and return to the back room to consult with the client. If it is agreed that the respondent should be removed, a facility staff member might be asked to enter the focus group room and tell the respondent that they've "received a phone call" to remove the unqualified respondent. This method also works well for removing unruly or particularly untamable respondents. Although it's still the best policy to keep an errant respondent in the group if possible, retaining especially troublesome or unqualified respondents can sometimes raise questions about a moderator's ability to supervise recruiting or to manage the respondents.

Sit by or Near Power Brokers

Once the moderator has left the back room to start the group, the moderator's associate becomes responsible for managing the back room. This assignment is critical. The associate must understand who the power brokers will be and should sit close enough to answer their questions, squelch damaging comments, and foster a positive relationship with them. In fact, the associate's presence alone will usually help to deter observer criticism. When the associate manages a back room well, he or she often builds relationships with the other observers, sometimes leading to additional work from other divisions in the client company or from the visiting agency. In short, an associate's help in the back room can be an indispensable part of successful focus group moderation.

Discourage Back Room Contact During Groups

Make clear during your pregroup briefing with the client and other observers that the moderator will come back before the group's end to see if the topics have been covered sufficiently, or if there are additional questions to ask. This step usually discourages note passing from the back room to the moderator during a group. Frequent note passing to the moderator can disrupt the flow of the discussion, waste time, and undermine the moderator's leadership of the group.

Review Results Briefly With the Client Between Groups

After finishing a group, the moderator should ask clients for feedback and suggestions about the group just completed, and solicit suggestions to improve future groups. If adjustments are needed, the moderator can then change his moderating approach or make slight revisions to the discussion guide. Such client input usually strengthens the moderator's position with the client.

The Formal Debriefing

Arrange to meet with the client after the last group of the day (or, if multiple groups, after the series of groups) to evaluate the results of the groups and to clearly define the next steps to be taken. During the meeting, be sure that the client understands what he or she should expect regarding deliverables, deadlines, subsequent quantitative research, etc. If subsequent quantitative research will take place, the formal debriefing can be used to set up the quantitative methodology (i.e., product testing; attitude, trial and usage survey; etc.). In short, the formal debriefing is a good time to brainstorm with the client and to tie up any loose ends.

While these suggestions require planning and effort, they will greatly improve a qualitative project's execution, strengthen a moderator's relationship with the client, and help to defuse political land mines in the back room.

About the Author

Bruce Crandall is a Senior Vice President at Decision Analyst. The author may be reached by email at *bcranda@decisionanalyst.com* or by phone at ***1-800-262-5974*** or ***1-817-640-6166***.

Decision Analyst is a global marketing research and analytical consulting firm. The company specializes in advertising testing, strategy research, new products research, and advanced modeling for marketing-decision optimization.

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604 Avenue H East ▪ Arlington, TX 76011-3100, USA
1.817.640.6166 or 1.800. ANALYSIS ▪ www.decisionanalyst.com