Second Edition
Completely Updated

Spring
2012

New Qualitative Research
Methods & Tools

USER GUIDE:

Choosing among
today's qualitative options

Understand new qualitative research methods

DIRECTORY:

New qualitative research
PLATFORMS and PROVIDERS

www.NewQualitative.org

QRCA
QUALITATIVE RESEARCH
CONSULTANTS ASSOCIATION

GREENBOOK®

With the support of the **Qualitative Research Consultants Association (QRCA)**, we are pleased to present the second annual user guide and directory of new qualitative research tools and techniques.

While remote-access qualitative methods have been around for over ten years, expansion of their use beyond early adopters is a recent phenomenon that appears to be accelerating.

Measured by visitor traffic across the GreenBook platform, interest in online and mobile qualitative methodologies is growing at more than double the rate of other market research techniques. Additionally, results from the most recent GRIT Report show that two-thirds of researchers expect to use online communities in 2012 and over one third expect to employ mobile qual and webcam-based approaches.

Qualitative options continue to evolve rapidly, particularly those that allow researchers to capture behavior and emotions "in the moment." Our completely revised User Guide includes:

- An updated list of qualitative options – including mobile-enabled solutions, tablets, webcam/video options, and "do-it-yourself" vs. "full featured" approaches
- Practical tips for exploring new research options and staying current with the ongoing evolution of qualitative research
- An expanded checklist of factors to consider when choosing qualitative methods and providers

The **Platforms Directory** offers a detailed and current overview of qualitative research software tools, applications, and services while the **Providers Directory** profiles the researchers and firms who directly apply new qualitative research methods.

We also invite you to visit **NewQualitative.org**. Aside from the continuously updated user guide and directory, this companion website features a blog written by leading qualitative research experts, full of practical advice and valuable insights.

We would like to thank our co-authors, *Betsy Leichliter* and *Jay Zaltzman*, for creating a thoughtful and balanced overview of qualitative research approaches.

Qualitative research providers and their clients face the difficult task of choosing the best methods and the most appropriate tools to meet their research objectives. Our hope is that this publication will offer the guidance, resources, and inspiration to ease your way forward.

Enjoy!
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Publisher

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About QRCA

Qualitative Research Consultants Association (QRCA)
(www.QRCA.org) is a vibrant global organization of qualitative researchers immersed in the most exciting work being done in the field. Our nearly 1,000 global members apply their passion, creativity and experience to help clients tap into the power of qualitative marketing research.

QRCA is the premier organization for qualitative research, providing both buyers and practitioners with opportunities to connect and stay current. The award-winning Views magazine available online and in print; free monthly QCast webinars; multiple conferences and events are just some of the resources available. The annual Qually Award recognizes excellence in qualitative research and is open to submissions worldwide. Find out more through www.qrca.org.

GREENBOOK®

About GreenBook

GreenBook brings practical resources to market research professionals on both sides of the table. At the same time, GreenBook is an integrated marketing platform for the entire market research industry. It supports lead generation, content publication, search marketing, advertising, webinars, and events through a variety of media:

- **GreenBook Directory** of market research firms, consultants, and facilities | www.GreenBook.org
- **GreenBook Health** directory of healthcare market research providers | www.GBHealth.org
- **GreenBook Blog**, focusing on strategic issues facing the industry | www.GreenBookBlog.org
- **GreenBook MR e-Newsletter,** inspiration and information that cuts through the clutter
- **ResearchShare,** a popular Twitter feed with links to great articles and blogs | @ResearchShare
- **GreenBook Research Industry Trends** (GRIT), industry-leading survey and report
- **New Qualitative Research Methods & Tools,** a publication and a website featuring

  a user guide, directory, and a blog | www.NewQualitative.org

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Choosing Qualitative Options to Meet Your Research Objectives

By Jay Zaltzman and Betsy Leichliter

Once upon a time, long ago (think *"Mad Men"*), qualitative research users and providers had limited choices about what types of qualitative research to use. They wondered, *"Should we do individual or group sessions? In person, or on the phone? Which city or cities should we choose? Should we do qualitative research first, or quantitative?"* They also debated whether men and women could ever be included in the same group discussion, and other issues that may seem very quaint in 2012!

As new communications channels and habits evolve rapidly around the world, researchers continue to experiment with, adapt, and adopt new qualitative options – especially approaches that can help them get "up close" to their target audiences and experience their worlds through their eyes.

Along with this evolution, industry discussions about qualitative best practices are elevating a notch. In recent years, such discussions have focused largely on the "data collection" aspects of the process – especially when and how to use new internet and mobile-enabled methods. Now these discussions are broadening to include issues related to every aspect of qualitative research. – for example:

- How to source authentic participants and protect their privacy when using digital methods?
- How to manage the rich "information overload" that qualitative can generate, and streamline qualitative interpretation and output to deliver actionable information, insights, or inspiration to qualitative users more rapidly?
- How to define qualitative and quantitative research and make them work together well in a world where qualitative research might involve huge samples of participants or long-term engagement with them (as in some types of social media analysis or market research communities) – and classic notions of sampling and statistical projections are being being re-thought?

Qualitative providers and users now have a lot to think about when choosing the methods, tools, and talent that can best meet their research objectives. This Guide aims to help make these choices easier, by providing:

- Brief overviews of various qualitative approaches in use today, including ones that do or do not involve internet or mobile-based communications.
- Checklists of factors and tips to consider when choosing qualitative methods and providers to help you meet your research objectives.
- Tips for getting and staying up to date with new and emerging qualitative methods.

THE CHECKLIST: A place to start
when choosing qualitative methods

In last year's edition of this Guide, one of the most popular features was a checklist of things to consider when planning qualitative research. This year, we have expanded the checklist to reflect the more extensive options now available. As qualitative specialists who do not own or sell proprietary tools or platforms, we both think "agnostically" when it comes to choosing and recommending qualitative methods. We believe there is always more than one way to meet a client's qualitative research objectives, and in many cases, using multiple methods can provide much richer insights than just one approach. Thinking through the factors on this checklist has helped us and our clients make the best choices.

CHECKLIST: Things to Consider When Choosing Qualitative Methods

When choosing methods for qualitative research, consider these three questions first:

CLIENT CONFIDENTIALITY – *Is confidentiality of client information shared during the research absolutely essential?* There is no way to completely ensure confidentiality of information when conducting research remotely. A participant who is determined to "steal your secrets" can make a photo or recording of any information you share with them digitally or by phone (although most companies consider this type of espionage to be a very small risk). The safest way to conduct research involving critically confidential information is to get participants in a room and make sure they don't take anything with them when they leave!

INTERNET ACCESS – *Do the targets you're interested in have easy access to the internet through their computers, smartphones or other mobile devices?* If not, you may be limited to other remote or in-person methods that do not rely on the internet. Conversely, if you do not want participants to have access to the internet while your research is in progress because you do not want them to do their own "research" about the topics you're exploring, you may need to choose real-time methods (such as in-person or webcam sessions) so you can limit their access to the internet.

SENSORY – *Will your research involve sensory experiences such as foods, beverages, fabrics, fragrances, etc.?* Can this be done remotely, or will it require an in-person setting? In-person methods may also be required if your research includes biometrics/neuroscience techniques (eye tracking, skin responses, etc.) or devices such as dial meters.

Once these three questions have been answered, other factors to consider include:

OBJECTIVES – *What kinds of information, insights, or inspiration do you need to wind up with?* Clearly defining your objectives up front – the key issues that must be addressed, and any optional insights that would be "nice to know" – will give you the best guidance for making choices throughout your research.

TARGET PARTICIPANTS – *Who needs to be included or excluded from participating? Which communications methods are appropriate for your target – internet, mobile, telecom, in-person or a combination?* Will they need the flexibility to respond in different ways (such as a choice of texting or voicemail or email) depending on their circumstances? How will requirements for "completion" be defined to participants, and monitored? What are the best ways to identify, recruit and authenticate qualified participants?

PRIVACY/ANONYMITY – *Is it ok for participants to be identified or recognizable to each other or to clients, either during or after the research?* Or must you (by law or best practices) keep them fully anonymous? If any special permissions are required, how will they be obtained?

RECRUITING AND PARTICIPANT CARE – Do you need to recruit from client lists or other sample sources? Should recruiting be self-administered online, conducted by qualitative recruiting specialists, or some other way? Who will manage the "handshakes" between researchers, recruiters, facility/platform providers, and tech support from pre-checks through final payments?

REAL TIME OR EXTENDED TIME – *Should the research happen in real time/synchronously, or asynchronously, or both ways?* Security issues, participant or client availability – the need for discussions to evolve, and other factors can influence this decision.

IN-PERSON OR REMOTE – *Should in-person methods, remote methods, or some of each be used?* This decision may be driven by security, geography, and other factors on this list.

SHARING KEY LEARNING – *When, how, and with whom must key learning be shared – while the research is in progress, when it is complete, or over the long term?*

DEADLINES – *When do decision-makers need to act on key learning from the research?* When deadlines for deliverables are tight, the best choices may be methods that make client observation and rapid team debriefs easy. Longer timeframes open up more options.

RESEARCHER EXPERTISE – *What level of qualitative research expertise will you need to design, conduct, and/or interpret the research?* Do the researchers need experience with specific topics, targets, methods or techniques?

LEAD TIME – *Is there time to design, build, and ideally pilot a new method before the research launches?* Qualitative projects that depend on internet or mobile-based communications can initially take more time to set up, moderate, monitor, and analyze, compared to in-person methods where adjustments can be made quickly on the fly.

SPECIFIC TECHNIQUES – *Are there specific techniques you would like to include, such as image sorting, projectives, whiteboarding, game-like activities, role playing, etc.?* Many qualitative techniques can work well in person, with webcams, or via computers or mobile devices. A little experimentation can help you quickly decide which methods will be easiest and most effective for your purposes.

UNOBTRUSIVE/INTRUSIVE – *Will communications with participants need to be unobtrusive "fly on the wall") or intrusive ("in their face") or some of each?* Qualitative researchers are finding more and more ways to connect successfully with participants, occasionally or continuously, by combining different communications methods (such as alternating live one-on-one voice calls with online discussion board activities).

SPECIFIC TOOLS vs. MULTI-PURPOSE TOOLKITS – *Which type of tech solution is best suited to your project?* One designed for specific purposes (such as creating diaries) or one that you can use in various ways (such as "one-stop" platforms that combine discussion boards with mobile-enabled channels and other tools)? Simpler solutions may have shorter learning curves, but multi-purpose solutions offer more flexibility, and allow you to manage all participants "under one roof" when you combine online, phone, or mobile-enabled methods.

TECHNICAL GUIDANCE AND SUPPORT – *What types of human technical resources will you need?* 24/7 multi-country tech support? Tech checks or on-boarding for participants? Technical training or "co-piloting" for researchers? Guidance on how to design or build your project? Customized branding? Customized features or functions? Special activity reports? Special assistance with output or archiving? Tell your tech providers as much as you can about what you are trying to accomplish. Then listen and be prepared to re-think your vision if it is not yet easy, reliable, affordable, or feasible.

BUDGETING – *How much money can you invest in the research, and what expenses are essential or optional?* Users may assume that digital qualitative methods cost less than in-person methods, but that is not always the case. Qualitative research typically requires precise recruiting, so costs to recruit and incent participants are often similar for in-person and digital projects. Rent for online and mobile platforms is typically less than rent for physical facilities plus travel. However internet and mobile-enabled methods may require more time and expertise from qualitative researchers and technicians. When requesting cost estimates, ask researchers and tech providers to help you understand what their rates do and do not include, and if necessary, options for staying within your budget limits.

UNDERSTANDING THE OPTIONS

The many time-tested and newer qualitative options available today fall into one of two categories: Real-time (live, synchronous) and Not Real-time (asynchronous). Examples include...

Real-time (live) qualitative options

- 💬 Face-to-face one-on-one or group sessions, at research facilities or other locations
- 💬 Webcam/video one-on-ones or groups via computers or mobile devices
- 💬 Text chat, instant messaging, or SMS texting dialogues with individuals or groups, using computers or mobile devices
- 💬 Landline or mobile phone one-on-one or group discussions – with or without web support for showing multi-media information or concepts, collaborating with markup tools, sharing computer screens remotely, and more

Non-real-time (asynchronous) qualitative options

- 💬 Online discussion boards, forums, or collaboration platforms for one-on-one or group interactions that may include Q&A dialogues, projective or immersive activities, journaling/diaries,/blogs or other multi-media activities accessed via computers and/or mobile devices
- 💬 Longer-term insight communities, co-creation networks, or other longitudinal approaches
- 💬 Social media listening/observing, or engaging social media users in market research

Infinite combinations of these options are possible, and multi-method qualitative designs are becoming increasingly popular as researchers experiment with different ways to achieve their qualitative research objectives.

With so many new options, qualitative research providers and users are asking, "How do we choose the best qualitative methods to meet our research objectives?" In this article, we will:

- 💬 Provide a range of factors to consider when defining your qualitative objectives and considering which methods and tools to consider
- 💬 Discuss the strengths and challenges of various qualitative methods and tools and propose some parameters for choosing among them.

The following sections briefly explain a variety of methods and tools that can be used – alone or in combinations – for qualitative research.

The three best ways to keep up with new qualitative options

LEARN FROM EXPERTS – Take advantage of the many free educational resources provided by market research associations such as QRCA (the Qualitative Research Consultants Association at www.qrca.org). QRCA Views magazine, QCast webinars and on-demand archives, and the public LinkedIn QRCA Discussion Group are free to non-members as well as members. The Association also produces global, national, and regional in-person conferences and events to educate qualitative research providers and users. Experienced qualitative researchers are often available to serve as trainers, coaches, or "shadow" moderators for researchers who are using new methods for the first time.

SEE FOR YOURSELF – It is difficult to envision what you can do with qualitative options you have not tried before, until

you see how they work in case examples. Companies that provide qualitative platforms and tools offer many free webcasts and self-education materials online, including case examples shared by their clients. Exploring just a few providers per week will quickly expand your awareness of the possibilities.

JUST DO IT! – To truly understand whether qualitative options that are new to you are right for your needs, commit a little time and money to explore them in low-risk ways. For example, to see how mobile-enabled input might enrich home-based research, include a few mobile-enabled participants and activities in your next home-based project. If you wonder whether webcam interviews are a good fit with your target, try a few during your next in-depth interview project. Consider running your

own "research on research" experiments. A tiny pilot, using a handful of "friendly users" is a great way to learn what it's like to design, conduct, and interpret a new qualitative approach. Some providers will make their platforms available for limited use, at little or no cost, to researchers who volunteer their services to not-for-profit clients. Some providers will give researchers free access to run small "research-on-research" projects once they have used a platform for at least one paid project.

To truly understand whether qualitative options that are new to you are right for your needs, commit a little time and money to explore them in low-risk ways.

Online Discussion Boards
(groups or individuals)

Discussion Boards (also called forums or bulletin boards) continue to be a popular qualitative method worldwide due to their versatility and the rich results they can generate.

Discussion Board participants typically commit to log in once or a few times per day over the course of a few days or longer, to participate in an online experience moderated by one or more skilled qualitative researchers. Participants can be from a mix of geographic locations.

Researchers can set up different sections of a board in various ways:

- 💬 **One-on-one mode** – where each participant communicates with the moderator, but does not see or respond to comments from other participants
- 💬 **Blinded or masked mode** – where participants must post their own comments before they can see and reply to what other participants have posted
- 💬 **Group mode** – where all participants can see and reply to each others' comments in a threaded discussion

Moderators can give each participant access to an entire board, or just certain sections.

Clients can log in to watch a board unfold, and confer by posting comments that are visible only to the client/research team. Teams can also have their own private work area within a Discussion Board platform for planning, collaboration, and debriefs.

Discussion Boards continue to be popular worldwide due to their versatility and the rich results they can generate.

Boards often involve 15-20 pre-recruited participants, but the optimal number depends on the circumstances. For example, if participants have a great deal of expertise with a topic, it may be more productive to work with fewer participants. Boards offer the flexibility to start with a large number, break them into subgroups, or invite selected participants to engage in further activities online or offline. Decisions about size should consider the time required to actively moderate and interpret the input from all participants, since it can be extensive.

In the past, Discussion Board participants communicated primarily by typing and posting their thoughts. Observers did not have any way to see the facial expressions and body language cues evident in face-to-face sessions. However expert moderators developed ways to utilize analogies, projectives, and other techniques that can help board participants express their hearts and minds through "digital body language" with a remarkable degree of personality and affect. Now Discussion Board platforms often include webcam/video capture, audio/voicemail capture, and mobile input tools that can incorporate even more facial expressions and body language into the discussions.

Overall costs for Discussion Board projects are often similar to costs (excluding travel) for face-to-face projects involving the same number of participants. Recruiting and incentive costs tend to be similar for both methods, renting platforms may be cheaper than renting physical facilities, but boards can be much more labor-intensive for qualitative researchers and sometimes require expert tech support.

A follow-up comment often heard after successful Discussion Boards is, 'I really enjoyed this. Having a great moderator makes all the difference'.

Online Boards – Strengths:

- 🗨 Skilled qualitative researchers can obtain great depth from boards, since participants can take their time to provide thoughtful responses. In contrast to real-time sessions, board participants have the opportunity to complete every question or activity at their own pace, and moderators can follow-up on the fly with any or all participants.

- 🗨 We find that boards can provide the "best of both worlds" in terms of individual perceptions and group interaction. Participants are less likely to defer to others since...
  - 🗨 They can participate from the psychological security of their home or workplace
  - 🗨 It's easy to let them share thoughts individually with the moderator before or after they interact with others
  - 🗨 They can remain fully anonymously (with usernames and avatars rather than personal names or photos)

- 🗨 Boards can be labor-intensive yet efficient. One board often generates more qualitative data than a few real-time sessions involving the same total number of participants. So for some projects, one board per segment may be sufficient, which can save time for busy client observers.

- 🗨 Since boards can be set up on a project-by-project basis, they do not require high up-front investments or long-term commitments. Companies that need frequent access to specific target groups may find it more cost-effective to set up longer-term proprietary online "convenience panels" or "communities" (discussed in a later section).

Online Boards – Challenges:

- 🗨 When researchers or clients are disappointed by Discussion Boards, it is often because they were not able to achieve the level of group interaction they hoped for.

- 🗨 Sometimes this stems from using the wrong recruiting sources or methods. With Discussion Boards (and most other qualitative methods) it is typically necessary to use qualitative recruiting specialists to find people who truly fit your target specifications. Online panels designed for sourcing survey participants may not be appropriate, if their panel members are accustomed to taking quick short surveys rather than engaging in activities and conversations, or if they cannot provide expert human recruiters to help evaluate and authenticate recruits.

- 🗨 Sometimes disappointment happens when researchers try to write a Discussion Board as if it were a Q&A-style survey instrument, rather than designing an engaging, evolving qualitative research experience. If the issues you need to address can be covered well in a survey, by all means conduct a survey – that may be a much simpler way to go!

- 🗨 When using boards, it's never safe to assume that "if you build it, they will engage." Success will hinge on skilled qualitative researchers who can boost interaction by: 1) helping participants quickly understand how to engage with each other, 2) focusing and re-focusing the discussion as it unfolds, and 3) using online and offline communications to keep participants engaged and help them feel valued. A follow-up comment often heard after successful Discussion Boards is, "I really enjoyed this. Having a great moderator makes all the difference!"

Online Communities (MROCs)

Market Research Online Communities (MROCs), Insights Communities, Co-Creation Networks, and Advisory Panels are all ways to interact, with, collaborate with, and conduct qualitative (and sometimes quantitative) research among selected targets over time.

These methods may involve dozens or hundreds of customers, brand lovers, thought leaders, "creative/innovative" types, early adopters, or other targets recruited to participate in various activities. Often these methods are used in conjunction with innovation and new product development efforts.

Some companies use these resources primarily for research or co-creation on an ad hoc, project-by-project basis. Others prefer to cultivate a "community" environment that includes continuous interaction among participants, market research activities, and in some cases marketing activities such as promotional events or contests.

Online Communities – Strengths:

- These methods can be great for longitudinal issues, such as understanding the whole course of a decision-making process, or how new product usage evolves over time.
- Research can be turned around quickly, since participants are pre-recruited. For example, once a community, network, or panel has been established, it may be possible to start an online board the next day by simply emailing 100 or so members and taking the first 20 who respond.

Online Communities – Challenges:

- Communities can be very cost-efficient over time, but the initial investment can be significant, since a large number of people need to be recruited and incentivized.
- They can require a great deal of staffing resources to keep participants and clients engaged, to analyze input, and to coordinate how the community will be utilized by various stakeholder teams within a company.

Diaries, Journals, Blogs

Video Diaries, Online Journals, and Blogs can be used as stand-alone methods, as components within Discussion Boards or Communities, or as a prelude to in-person research.

With Online Journaling, pre-recruited participants write their own chronological "blogs" about certain activities they experience naturally, or are asked to experience during a journaling project – such as planning a holiday, choosing a college, etc. They are encouraged to provide detailed, thoughtful entries, which often include photos, video, or audio, as well as text.

With Video Diaries, participants speak to a webcam connected to their computer, a video camera in their smartphone, or a digital video camera, then email or upload their clips to be posted into an online platform. Participants can show and share what they are thinking and doing in real-time or "take us on a tour" – for example, showing items in their closet or refrigerator, how they do everyday activities in their home, or what they experience while shopping.

When deciding whether to use either or both of these approaches, consider two things:

- Some participants are more comfortable expressing themselves in writing, while others are most comfortable speaking spontaneously.
- Some experiences are easier to share in writing, while others are easier to share via video.

Both methods are well suited for learning about behavior, perceptions, and emotions as they occur ("a day in the life") and both can provide visual or multi-media materials to enrich reports. Analyzing and interpreting these user-generated materials can take a great deal of time, however. For this reason, some providers have been upgrading their platforms with new features to make it easier for researchers to tag, organize, clip, edit, or archive the media they collect.

Webcam/Video sessions (groups or individuals)

Webcam/Video conferencing has been available for more than a decade, but has had slow adoption for qualitative research until recently, when high-speed internet penetration increased and tight economic conditions limited travel for in-person research. Now that participants and clients are becoming familiar with mobile videoconferencing in their personal and professional lives, we expect Webcam/Video conferencing for qualitative research to expand more rapidly than ever.

During live Webcam/Video group sessions, pre-recruited participants in various locations use webcams with their computers, or smartphone video cameras and apps, to see and interact with the research moderator and each other in individual video windows on their screens ("Brady Bunch" style). The moderator can make available discussion materials, websites, whiteboards, and collaboration tools as needed. This method can also be used for one-on-one sessions. If a participant is not able to use a video connection they can still participate in voice mode.

Clients can observe sessions in real time from a computer or smartphone app, communicate privately with each other and the moderator via Text Chat, IM or phone, and watch recordings of the sessions later from a private online archive. Some clients like to gather in one room with the moderator to view the live sessions on a large screen and confer first-hand as a team.

Some researchers are comfortable conducting Webcam/Video sessions with little or no tech support – especially simple one-on-ones. But for group sessions, it is often necessary to work with a dedicated technical "co-pilot" so the moderator can focus fully on the participants. Expert technical partners can also provide guidance about how many participants to include per session, how to prepare them to participate, best ways to share videos or other materials during the sessions, and how to avoid or recover from glitches. Some also offer video editing, archiving, and transcription services.

Free or low cost Webcam/Video conferencing (such as Skype and other platforms designed for general or business use, or mobile-based solutions like Apple's Face Time) may be adequate for simple qualitative sessions. But critical projects tend to require platforms (typically based on Adobe Connect Pro) that have been adapted specifically for qualitative research, and provide more reliable voice/audio support and video-management tools. action among participants, market research activities, and in some cases marketing activities such as promotional events or contests.

Now that participants and clients are becoming familiar with mobile video conferencing in their personal and professional lives, we expect webcam/video conferencing for qualitative research to expand more rapidly than ever.

Webcam Sessions – Strengths:

- Webcam/Video sessions can be especially valuable with targets who are difficult to recruit for in-person sessions – such as new mothers and their babies, affluent working couples, people with difficult health conditions, busy professionals, etc.
- As with Online Discussion Boards, Webcam/Video groups offer a great balance: group participants are less likely to feel pressure to "conform" since they're participating from the psychological security of their home or workplace, but they are still interacting in real-time as they would in an in-person group.
- Researchers and clients are often pleasantly surprised to find that the "connections" that occur between participants and researchers during Webcam/Video sessions can be every bit as good as, and sometimes better than, face-to-face sessions. They also appreciate how client observers can see exactly what the moderator sees online – with no mirror-window in between.

Webcam Sessions – Challenges:

- Not everyone in your target may be comfortable appearing on live video. For example, teens can be hyper-conscious of how they appear to others, or they may have been trained for security reasons to avoid communicating via webcams with anyone but family and close friends. It may be necessary to take extra steps to assure participants that webcam/video conferencing is legitimate research, and their privacy will be protected.
- As with Online Discussion Boards, it's never safe to assume that group webcam participants will interact with each other spontaneously. Moderators need to find engaging ways to encourage group interaction.

Online Text Chat and Instant Messaging (groups or Individuals)

When the internet and "chat rooms" were new, Online Text Chat sessions were one of the first types of online qualitative research introduced as an alternative to in-person or telephone groups. During Text Chat sessions, pre-recruited participants use internet-connected computers in any location to type their responses in real-time. The moderator can introduce discussion topics from a pre-loaded list, type in questions or probes on the fly, and show concepts, videos, websites, or other information to participants. A transcript of the text can be generated as soon as each session is complete. Clients can watch the live text chat streams from any internet-enabled computer, and confer with each other and the moderator privately via Text Chat, IM or phone. Some clients prefer to gather together in the same room with the moderator during these live sessions, so they can confer as a team.

With Text Chat platforms designed specifically for real-time qualitative discussions, sessions can be conducted in group mode (participants see each other's responses as they are entered), or blinded mode (participants must respond before they can see others' responses). Individual interviews can also be conducted concurrently or sequentially, using one-on-one mode.

💬 When simplicity and immediacy are high priorities, Text Chat groups or concurrent interviews may be good choices to consider. Technical requirements are relative simple. Total time required from participants is often 60 to 90 minutes or less. Analysis can be quite rapid if the primary goal is to understand top-of-mind responses.

💬 Participants can interact well in Text Chat groups with skilled moderating and relevant topics – especially topics that they might naturally chat about online such as choosing a vacation cruise, sports or political news, etc. It is difficult for a participant to "dominate" in this format – and easy to manage them if they do.

💬 However, many clients and researchers feel that Text Chat groups cannot fully replace in-person or webcam sessions, for two reasons: they lack visual and voice cues, and can feel more like concurrent interviews than group discussions – especially if participants get so focused on writing their own thoughts that they don't read what others are saying.

💬 Some participants (especially frequent texters) can express their thoughts quickly and easily by typing, but some cannot. To accommodate those who are more comfortable talking, or to boost group interaction, some researchers add voice conferencing to Text Chat sessions. They periodically put the chat flow on hold to moderate quick oral discussions.

Other types of text chat platforms exist that are designed for specific purposes, such as getting rapid qualitative and quantitative responses to a range of concepts. They may partner with online recruiting panels to provide quick access to participants. Some researchers use these methods the same way they might conduct quick, low-cost "reality checks" among "friends and family" before proceeding to more in-depth research.

Now that many clients and participants use chat/IM in their everyday business or personal lives, it is finding more uses in qualitative research. Moderators can enable participants in Webcam/Video or in-person groups to type messages into a chat/IM stream while other participants are speaking – the sort of constructive multi-tasking often seen during online classes and business meetings. Clients and researchers also use chat/IM to confer while groups or interviews are in progress . Multi-function qualitative platforms often include chat/IM tools, with the option to save and export the text streams along with other types of participant input.

Now that many clients and participants use Text Chat or Instant Messaging in their everyday personal or business lives, it is finding more uses in qualitative research.

Telephone sessions (groups or individuals)

Telephone one-on-one and group discussions can be conducted using one of the many voice/audio conferencing systems available that give clients the ability to listen in to live discussions, or log in later to listen to recordings from a private online audio archive. Some systems also provide translation, transcription, support for dial-outs and participant care, the ability to put participants into sub-conferences and other call management tools, webcam conferencing, online discussion boards or collaboration whiteboards for use during or between phone conferences, or special services such as voicemail/audio capture systems designed specifically for shop-alongs or other qualitative research uses.

With skilled moderating, Telephone groups can provide a great deal of interactivity and spontaneity. Due to visual and time constraints, they don't provide the same degree of non-verbal communication as in-person or Webcam/Video sessions, but a great deal is communicated via tone of voice, inflexion, pauses, etc.

Interestingly, during telephone one-on-ones (with or without internet support for sharing information) participants can be even more forthcoming than in face-to-face interviews – because they are getting the moderator's full attention, and because they tend to "fill the void" rather than let moments of silence occur during a phone conversation.

Telephone Sessions – Strengths:
- From a technical perspective, Telephone-only sessions are quick and easy to set up and relatively low cost, since participants don't need any special equipment, can participate from various locations including places where internet access is unavailable, unreliable, or unaffordable.
- If your target is experienced with voice conferencing (as many business people are) it can work quite well for research discussions, since participants already know how to "share the air time". If they are comfortable using Text Chat or Instant Messaging, enabling them to do so during calls (through a stream that is visible to the moderator and other participants) can build engagement and generate more input from the group.
- Telephone groups often generate more interaction and depth when participants are already acquainted (such as professional colleagues) or have strong common interests in the topic. Asking group participants to review or share some information in advance can help establish a productive environment.
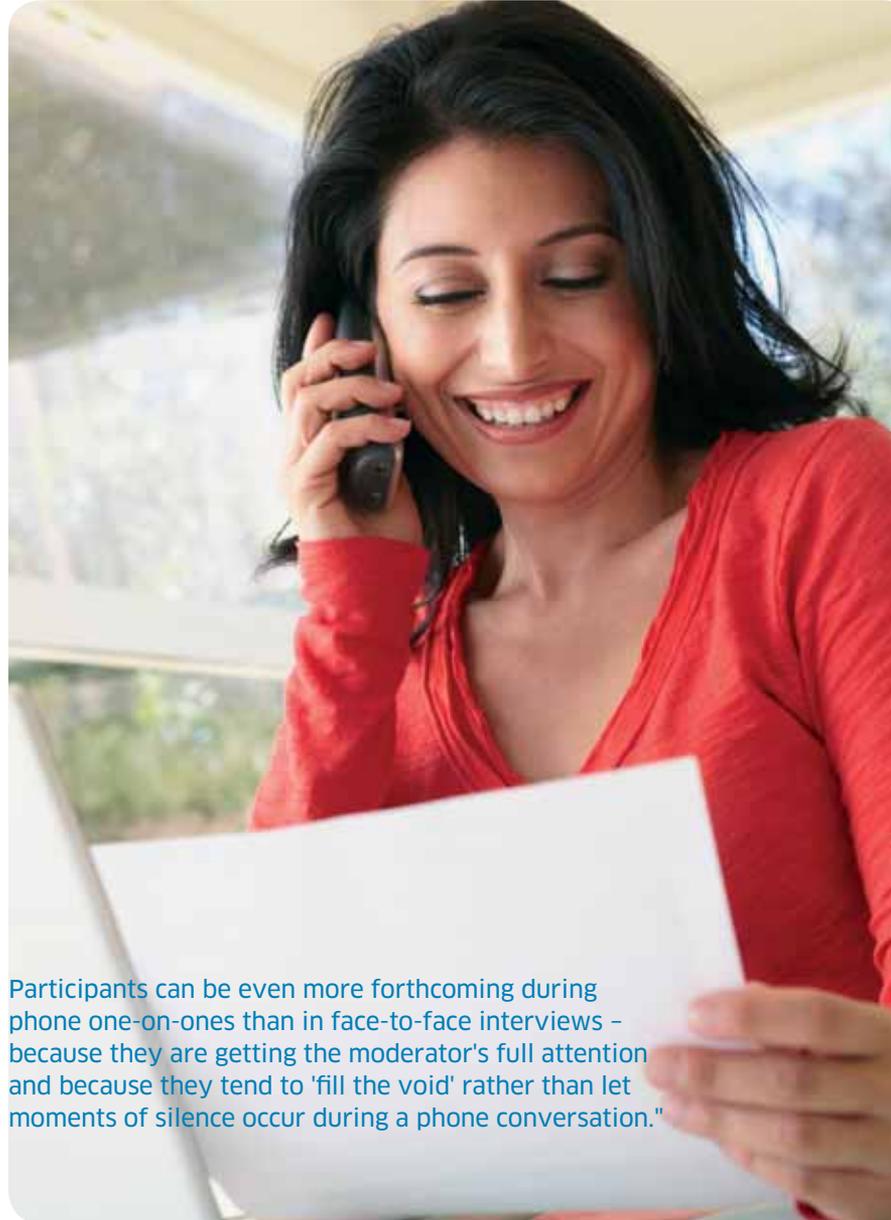
Participants can be even more forthcoming during phone one-on-ones than in face-to-face interviews – because they are getting the moderator's full attention and because they tend to 'fill the void' rather than let moments of silence occur during a phone conversation."

Telephone Sessions – Challenges:
- As more people make mobile phones their primary or only phones, Telephone groups sometimes suffer from weak mobile connections, sound quality, or battery life. These risks can be reduced by encouraging the use of landlines, and having backup plans if mobiles fail.
- It is important to consider whether clients will feel more or less comfortable with a "faceless" call vs. in-person or webcam sessions, and what it will take to keep them engaged – not multi-tasking!

Mobile Qualitative

As access to broadband and wifi expands, and adoption of mobile devices – especially internet-enabled smartphones and tablets – continues to climb worldwide, researchers are finding more and more ways to use mobile-enabled qualitative research.

Mobile devices can be used many ways for qualitative research:

- They can enable quick messaging back and forth between participants and moderators, using SMS texting, instant messaging, or email. Such exchanges can take the form of Q & A dialogues, more free-flowing conversations, notes, diary/journal entries, attachments, or moderator instructions, probes, reminders, and affirmations.
- Mobile devices can also be used for more in-depth one-on-one dialogues using voice, voicemail, IM or email – including the types of mobile conversations people have naturally in their everyday work or personal lives.
- Participants can use smartphones or tablets to access mobile apps or the mobile web to see and respond to on-screen questions or activities, and submit files easily.
- Participants can also use their mobile devices to input information to an online forum or other central place, then log in later to engage in more activities or conversations, individually or as a group. Compared to handheld cameras or recorders, mobile devices make it much easier for participants to quickly capture and share photos, video clips, or voice recordings, by emailing them directly from their mobile device without the need to transfer them to a computer first.
- For many qualitative projects, participants use their mobile device in multiple ways – just as they do in their everyday lives.

Qualitative researchers are busily exploring how new multi-purpose qualitative platforms and apps can be used to share participants' experiences and perceptions in more ways than ever.

Some mobile-enabled projects use just one or two types of communication such as SMS or voice capture. This may be the best or only option in situations where target participants cannot access the internet easily or affordably, but can access mobile networks with their feature phones.

- Voice capture can be done with any phone. Participants are given small printed cards with instructions for how to share what they do during a shopping trip or other activity. They dial in periodically to a private line where they are asked to record their spoken responses. Recordings are assembled in a central location online, where researchers or clients can log in to listen or request transcripts.
- SMS/texting was among the first methods adopted for qualitative research because many people use it in their daily lives on their feature phones or smartphones. SMS can work well for situations where quick top-of-mind short messaging (160 characters per message) is a natural way to communicate. Managing the flow of text messages and special phone numbers or 5-digit short codes ("text to 99999") typically requires an online research platform specifically designed for use with SMS, or a multi-purpose qualitative platform that can accommodate SMS, plus technical support. Some of these solutions can display the SMS flows almost instantly for researchers or clients to view online, while others must process them in batches or overnight, and export them in spreadsheets. When using SMS, it is important to be aware that even though texting typically "feels" instantaneous, the actual timing of SMS messages can vary as they move between mobile carriers. Also, participants cannot always reply quickly and may lose track of text messages. If your project topics or activities must be completed in a specific order or in more depth, then voice, email or online might be better choices.

Multi-purpose "one stop" qualitative platforms now make it possible to use multiple types of mobile and online communications within the same project – including online or mobile-enabled voice capture, video capture, texting, IM, posting online, and inputting or uploading photos, video clips, or other files. One multi-media approach that is becoming popular is to ask participants to use their mobile devices to share thoughts and photos/videos while they are engaged in an activity (such as baby care or paying bills), then log

in later to an online forum to provide more individual reflections or engage in group discussions. Moderators use the platform's online dashboard to manage these communications, and client observers can log in to view the flow and interact with each other and the moderator without being visible to participants. These multi-purpose qualitative platforms make it possible to...

- Manage mobile and online participants in one place (assigning usernames/avatars, assigning user characteristics (demographics, product/brand usage, attitudes, etc.) for filtering or subgroups, monitoring their progress, provide reminders/prompts/ encouragement/support via email or SMS
- Manage mobile and online input in one place for analysis, including content searching, tagging, and filtering by user characteristics; converting, editing, and archiving photos and videos; exporting transcripts
- Accommodate multi-country or multi-language projects "under one roof" enabling easier access and collaboration among global researchers and client observers

Some multi-purpose qualitative solutions also offer app-based versions.

Qualitative researchers are busily exploring how these new multi-purpose qualitative platforms and apps can be used to share participants' experiences and perceptions in more ways than ever. Here are some recent examples:

- Sharing time-sensitive experiences with participants as they occur, such as holiday celebrations and sports and entertainment events.
- Monitoring a "day in the life" of media experienced by busy office and home-based workers, using mobile email with photos/videos, and postings online. Connecting via mobile voice and photos with business travelers as they encounter advertising while crossing borders through busy airport terminals.
- Sharing key steps taken in major decisions over the course of weeks or months, such as choosing a car or a college.
- Having professional women take their smartphones to their closets to narrate short video clips about outfits they like to wear to work, and take their smartphone to work to capture what they and their colleagues actually wear to work.

Over time, it would not be surprising to see qualitative platforms move in two directions:

Some will focus on being the best tool for a specific situation with high demand – such as capturing and analyzing diaries and journals for remote shop-alongs. These solutions will promise high efficiency with a low learning curve.

Some will aim to be seamless "one-stop" toolkits where researchers can choose or combine whatever tools and techniques they need for each qualitative project. Their promise will be maximum versatility and flexibility for many situations.

Some researchers have hesitated to try mobile-enabled qualitative methods because "not everyone in our target uses smartphones or tablets". But for many targets today, smartphone and tablet penetration is high and continues to grow. Rather than limiting yourself to the lowest common denominator when it comes to communications channels, consider giving participants some choices about how to communicate during your research – for example via computer, or mobile device, or voicemail.

When planning and conducting mobile-enabled research for the first time, make no assumptions about what you can or cannot do. Communicating via computers and the internet has become quite standardized worldwide over the past two decades – Mac/Windows/Linux users can communicate with each other, over different browsers, with few difficulties. Unfortunately the same is not yet true for mobile communications. The mobile world is full of many different devices, plans, carriers, and browsers that are not yet compatible with each other or with computer browsers. Capabilities and costs can vary greatly from one country to another. Over time, standards will evolve, but until then, keep an open mind about methods and seek advice from researchers and technicians with mobile qualitative experience.
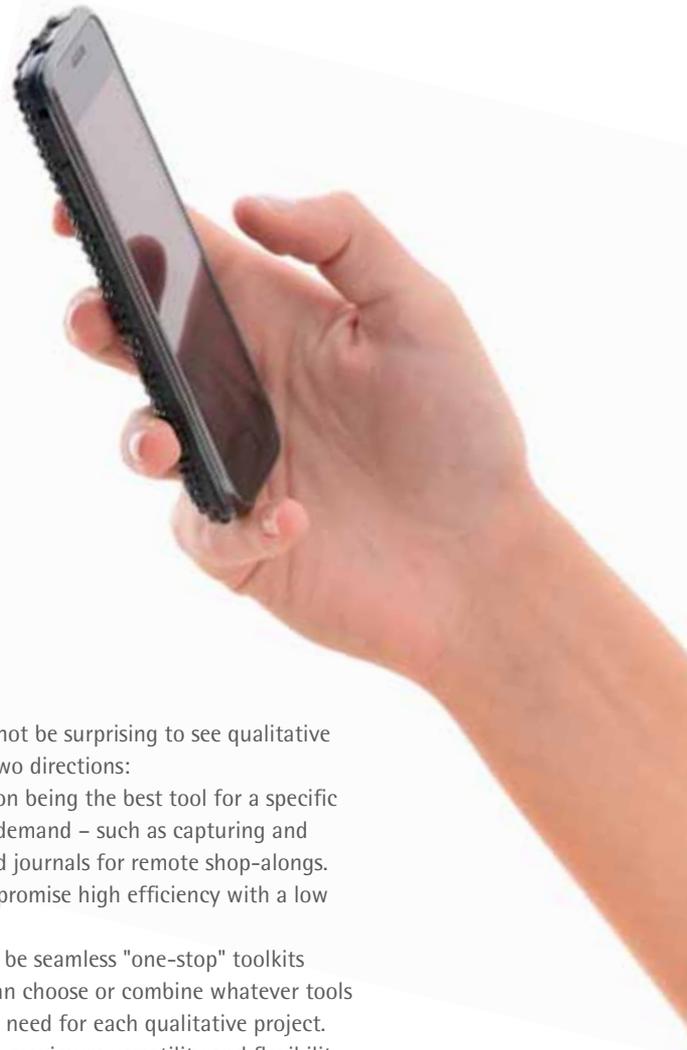
Social Media-related qualitative research

A number of the qualitative research solutions discussed in earlier sections have been strongly influenced by the popularity of social media. In particular, some qualitative research tools and platforms now offer the ability to create interfaces or environments that convey a look or feel similar to Facebook, Twitter or other popular social media, in addition to more "neutral" or custom branded environments.

Social media such as Facebook, LinkedIn, blogs, Twitter, fan groups, peer advice forums, etc. have become a popular resource for secondary research, prior to investing in primary qualitative research. Researchers often find social media to be a helpful starting point for identifying trends and understanding how consumers express ideas.

As social media evolve, a variety of "listening" methods, such as text analytics and discourse analysis, are being used to glean insights and inspiration. Qualitative researchers are often tapped to apply their analytical and interpretive skills to these efforts.

Information shared through social media can be quite rich, since the people who contribute to it are often highly engaged, interested, and in some cases "influencers." However, social media content may be skewed by people with very strong opinions. It can also be quite challenging to determine whether users of specific social media represent your targets, since social media can involve hundreds or even millions of participants and little is known about them beyond what they communicate via the social media they use. In contrast, primary qualitative research tends to involve smaller numbers of participants, recruited to fit precise specifications based on your research objectives.

It can be tempting to try to engage users of "natural" social media in market research activities – either within the social media they use, or by recruiting them into research conducted elsewhere. Some qualitative researchers have had good results recruiting business people from LinkedIn or other social media that cater to people with professional interests. However we recommend that recruiting via social media be done with caution, since many people consider Facebook or other social media to be very personal spaces. It is also important to be aware that it can be difficult or impossible to authenticate people from sources like Craigslist or "get paid to do research" sites.

If you are considering "stepping in" to social media to conduct research, we recommend that you first review the guidance that major market research associations offer concerning best practices for researchers working in a world of rapidly–changing privacy regulation.

Qualitative and Quantitative market research

Now that research can be conducted so many ways, researchers seem to be re-thinking some long-term habits and guidelines concerning when and how to use qualitative and quantitative research. In the past, qualitative and quantitative research were typically segregated into separate projects, managed by separate research specialists, and conducted sequentially (qual first then quant, or vice versa, depending on the research objectives). Qualitative usually involved small samples (not statistically projectable to entire targets), while quant used larger samples to attain the desired level of statistical projection.

But now "big qual" has become a reality – especially in the form of qualitative analysis across huge numbers of social media users, or qualitative research conducted across multiple countries or over long time spans where the total number of participants or data points can be quite large.

Quantitative researchers are borrowing qualitative techniques (such as projective exercises) to make survey research more engaging, and qualitative researchers are adapting quantitative techniques for qualitative purposes (such as using instant polling tools to fuel online discussions). And today's multi-purpose research platforms make it easier than ever to combine qual and quant into the same project (for example, by seamlessly connecting an online discussion board to an online survey or other quantitative application).

Some researchers have turned to online or mobile panels – typically designed to provide participants for online survey research) – for qualitative recruiting too, because they assume they need to use such panels to find internet or mobile-enabled participants (not true!) or because they are trying to reduce recruiting time or costs.

So it is not surprising that recent discussions in the MR industry have focused on the potential benefits and risks of "blurring the boundaries between qualitative and quantitative research." Some even challenge whether traditional notions of statistical projection from small samples to entire target populations are still valid or even feasible in today's world.

The old rule of thumb that "quant means big and qual means small" can be too simplistic for today's world, where it is not safe to assume that all research buyers understand when and how to use qualitative or quantitative research, or combine them intelligently into one project. So it has become more important than ever for researchers to clearly spell out up front:

💬 Will the research they recommend to meet a client's objective use qualitative and/or quantitative methods and techniques?

💬 Will results be interpreted qualitatively and/or analyzed quantitatively?

The old rule of thumb that 'quant means big and qual means small' can be too simplistic for today's world.

THE TIPLIST – Experience-based tips to help keep your qualitative project on track

TIP #1 – *Before you choose methods and design your research and analysis plan, make your objectives as clear as they can be.* They will be your best guide for choosing methods and techniques, before and during your qualitative research.

TIP #2 – *Just because your research will be online or mobile-enabled, don't assume you must recruit people online, via mobiles, or from panels.* Qualitative research participants typically must be fully "on spec" since they are so visible to the researchers and client observers. So experienced researchers tend to rely on trusted qualitative recruiting specialists to screen and authenticate participants, regardless of which methods or communications channels they choose for their research.

TIP #3 – *Before you use a qualitative method that is new to you, do a tiny pilot version if possible.* Then start your project small and slow, and give yourself the chance to course-correct.

TIP #4 – *Have more than one way to get the job done.* Just as a bad storm or strike can disrupt plans for in-person research, "bad things can happen" at any time when your research relies on internet or mobile communications. Think through all the links in your process chain, so if one of them breaks, you can easily switch to Plan B.

TIP #5 – *Don't confuse input that is interesting with insights that inform or inspire.* Before you ask participants to share photos, videos, etc., with you, ask yourself, "How will we make this material meaningful to the research users?"

TIP #6 – *Just because participants can share experiences with you "in the moment" don't assume their input will be more honest, objective, or authentic than it would be in other contexts.* Often people can engage in an experience and communicate about it at the same time, but not always. Consider asking them to also share expectations in advance, or reflections afterward.

TIP #7 – *Digital and mobile-based qualitative methods may be faster, better, OR cheaper* for achieving your objectives compared to classic in-person or telephone-based methods – but not necessarily faster, better, AND cheaper.

TIP #8 – *When choosing qualitative platform or tool providers, don't just ask about specific features or functions, tell them what you need to accomplish during and after your research.* Terminology is not yet consistent across many of the newer qualitative methods, and providers upgrade their capabilities often. So tell them in plain words what you need to accomplish and find out what can or cannot be done with their solutions.

TIP #9 – *Set clear expectations with participants about what they can count on from you and what you will expect from them* in terms of their time and involvement. If you need group interaction during remote or asynchronous projects, address this during recruiting and build into the on-boarding process easy ways for participants to interact with each other right from the start.

TIP #10 – *Don't make assumptions about support from platform providers – spell it out.* Some solutions offer minimal or no support. Others can provide extensive training, design advice, customization, hands-on management of participants or materials, and more – but not all services are free. Ask questions, be realistic, and budget for whatever help you may need from tech providers, coaches/shadow moderators, or multi-media reporting experts.

TIP #11 – *If you don't have the time to learn and implement a new online or mobile qualitative method, consider using in-person or telephone methods if feasible.* Often these methods are the most flexible, efficient, easiest for authenticating participants, and most conducive to researcher/client collaboration.

Summary

Since each of the qualitative methods discussed here have different strengths and limitations, using a combination of familiar and new methods can be a great strategy for achieving your research goals. You will often come away with greater confidence about the insights and actionability of your research when you approach the issues from different angles, using different communications channels and techniques. This is also an efficient, low-risk way to expand your research toolkit.

Above all, we encourage qualitative users to partner with expert qualitative researchers who have experience with a variety of qualitative methods, and can help you find the best ones to meet your objectives.

Some of the newer qualitative platforms and tools are being targeted to "do-it-yourself" users seeking rapid low-cost solutions for certain types of qualitative data-gathering and analysis. This disintermediation trend is similar to the way quant survey users have adopted low-cost do-it-yourself survey tools to implement some of their survey research. Qualitative users who have the internal resources to design, manage, and interpret their qualitative research may find that DIY approaches are a good choice for some situations.

However, there are still no magic platforms, templates, instruments, or analysis programs that can do all of the thinking for you. Qualitative research continues to be a dynamic blend of art and science that relies heavily on human interaction, topic expertise, creativity, and flexibility to yield rich results. Partnering with experts to help design, conduct, and/or interpret your qualitative research continues to be the best way to boost your ability to achieve your goals.

No qualitative platform, template, instrument, or analysis program can do all of the thinking for you. Just as every plane needs a pilot, most qualitative projects need expert researchers to help get them where they need to go.

> No qualitative platform, template, instrument, or analysis program can do all of the thinking for you. Just as every plane needs a pilot, most qualitative projects need expert researchers to help get them where they need to go.

As shown in the chart below, whatever your timing, design, and location needs may be, you will generally have more than one qualitative method to choose from to meet your research objectives – and this list continues to grow!

Method	Timing		Design		Location		Time Period Covered	
	Real Time	Asyn-chronous	Group	Individual	In Person/ Face to Face	Remote	In the Moment	Retro-spective
In-Person Discussions	✔		✔	✔	✔		✔	✔
Online Discussion Boards		✔	✔	✔		✔	✔	✔
Diaries, Journals, Blogs		✔		✔		✔	✔	✔
Online Communities (MROCs)	✔	✔	✔	✔		✔	✔	✔
Webcam/Video Sessions	✔		✔	✔		✔	✔	✔
Online Text Chat and IM	✔		✔	✔		✔	✔	✔
Telephone Sessions	✔		✔	✔		✔	✔	✔
Mobile Qualitative	✔	✔	✔	✔		✔	✔	✔

About the authors

Jay Zaltzman has been a qualitative research consultant since 1994. He conducts research for clients in a wide range of fields, including website-related research, as well as high tech, healthcare, financial services, consumer packaged goods and others.

In 2010, Jay gave presentations on the topic of choosing among new research methods at the AQR/QRCA conference and the QRCA annual conference.

Jay has made it a point to keep abreast with online and remote research methods as they develop, starting as early as 1999. However, he tries to be "agnostic" when it comes to the research method: the main goal is to find answers to research questions. The most appropriate research method may be a newer one, a more traditional one, or a combination of both.

Jay was born in New York and moved to Israel as a child. He received his first qualitative research training in the Israel Defense Forces, where he trained as an interviewer of recruitment candidates. After his military service, he completed a Bachelor's degree in Psychology at Tel-Aviv University. He began his career in market research after returning to the U.S.

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Betsy Leichliter is Qualitative Advisor at NYC & Chicago-based Leichliter Associates Market Research / Idea Development, which provides US and global clients with custom qualitative and interactive research for new products, services, environments, and experiences.

In keeping with her company motto – Open Minds Open Minds® – Betsy is recognized as an early adopter/adapter of new communications technologies for qualitative research. Her top area of interest for 2011 is developing new ways to use mobile devices and online platforms to sustain rich, multimedia qualitative interactions with people in situations where research has been difficult or impossible to do until now.

Betsy holds BA and MBA degrees from Stanford, and teaches Marketing Research and Qualitative Workshops to international students at NYU's School for Continuing and Professional Studies. She is an active peer coach and knowledge contributor via QRCA, social media, and other professional channels.

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Additional resources

Here are some resources to help users and providers of qualitative research become more knowledgeable about the options available today or in development:

QRCA.org (Qualitative Research Consultants Association) offers buyers and practitioners multiple opportunities to learn and connect. The QRCA website is a content hub where you can access the archives of free monthly QCast webinars, read the award-winning QRCA Views magazine, download podcasts with thought-leaders; find conferences, events and discussion forums.

GreenBook.org (GreenBook Directory of Marketing Research Companies and Focus Group Facilities) GreenBook directory is the most detailed and accurate online guide for buyers of market research services of any kind, including the entire spectrum of qualitative services: permanent research facilities, recruiting services, moderators, transcription services, and more.

NewQualitative.org (companion website to the New Qualitative Research Methods & Tools publication) Aside from the continuously updated user guide and directories, this new website features a blog written by leading qualitative research experts, full of practical advice, thought-provoking opinions, and valuable insights.

Fieldwork Webwork (cont'd)

Included with our Virtual Facility rental you will receive:
- An "onsite" tech/host who will help log in respondents, trouble shoot any technical questions, start and end recordings and conclude all interviews
- Moderator/client training
- Digital video recording available for viewing/download 24 hours after interviews
- Respondent test calls prior to interviews to limit technical issues during interviews
- Integrated audio through a telephone line to avoid feedback and other audio difficulties
- Virtual rooms available to be programmed in English, German, Spanish, French, Italian, Dutch, Portuguese, Turkish, Russian, Japanese and Chinese

Webwork Discussion Boards / Online Bulletin Boards, Journals, Diaries and Blogs

Our Bulletin Board is a terrific tool that allows our clients to connect to respondents over a select period of time at the respondents leisure.

Notice Only questions

Clients can post notices for respondents to view that do not need any action taken by the respondents.

Text Response questions

Clients can post questions where the respondents reply using a text only responses.

Multiple Choice questions

Clients can post questions giving respondents multiple choices to choose from as answers. Respondents can leave an optional text response or clients can require a text response.

Multiple Answer questions

Clients can post questions giving respondents multiple answers they can choose as answers. Respondents can leave an optional text response or clients can require a text response.

Media Response questions

Clients can post questions where the respondents reply using an image or video file they upload. Respondents can leave an optional text response or clients can require a text response.

Add Attachment feature

Clients can add an attachment to a question so the respondents can download the attachment and save it to their local machine.

Video and Image feature

Clients can add a video or image to questions allowing respondents to view the stimuli and answer with either text or multi choice/answer responses.

Charting Responses

Clients can view a pie chart of multi choice or a bar chart of multi answer responses on the fly.

Backroom Notes

Clients can leave "backroom" notes posted to the overall board or to specific questions/responses that only other clients/moderators can see.

Canned Responses

Clients can save canned responses or emails allowing them to communicate frequently used text at the click of a button.

Question Masking

Masking can be Full Masking, Partial Masking or None. Full Masking means respondents will never see anyone else's answers. Partial Masking means respondents will see others answers but only after providing their own response.

Mandatory Questions

Questions can be Mandatory or not. Questions that are Mandatory must be answered before a respondent can move on to a new question.

Group Tags

Group Tags can be assigned to respondents based on any criteria. Questions can be programmed so only specific group tags can view those questions or certain response options within a question.

Full Transcripts

Transcripts can be drilled down per question, per respondent, per date etc. Transcripts can be exported into: HTML, Word, PDF, Text or Excel.

Included with our Discussion Board you will receive:
- Up to 30 participants
- Moderator/client training
- Unlimited clients/moderators
- Unlimited sections/questions
- Bulletin Boards available to be programmed in English, Finnish, German, Spanish, French, Italian, Polish, Indonesian, Dutch, Portuguese, Turkish, Russian, Japanese and Chinese

Webwork Online Concept Markup Tool / Concept Markup Capabilities

Our Online Concept Markup tool allows our clients to receive detailed feedback on images of their concepts.

Markup Tool can be utilized within our Virtual Facility or Bulletin Boards. Respondents can use features within markup tool to communicate likes, dislikes, positive findings or negative findings and neutral feelings. Respondents can give feedback on a single image or several images. Clients receive screen shots of the actual markup as well as heat maps that include just a single respondent's feedback or all of the respondents who participated feedback in a single image.

Webwork Online Surveys / Online Surveys, Website Exit Interviews, Panels

Our online surveys allow our clients to reach just a few or several hundred respondents to collect qualitative and quantitate data.

Consumer / Business / Medical Panels

Respondents are screened and qualified and then asked to participate in a panel for a predetermined amount of time. Respondents will then be sent regular surveys throughout the length of the panel.

Online Surveys

Respondents are sent a single survey without being screened. The survey continues to go out to respondents until we reach the desired number of completes.

Website Exit Interviews

Working with your web developers Fieldwork can program a survey that asks those who visit your website to share their feedback before they leave the site.

Distinctive Features

Having experience in the virtual research world as well as with traditional face-to-face research, Fieldwork can truly be your partner in tailoring each of your projects to get the information you need. Our online toolbox, in combination with our national respondent database and recruiting expertise offers the chance to accomplish what can be difficult or impossible to do in traditional focus groups. We have recruited and hosted virtual groups of limited mobility patients, road warriors, hard-to-find medical specialists and others that would be impossible to gather physically. Webwork offers an experienced team that will discuss your overall project and suggest the best solution based on your needs. We can then manage all aspects of your research starting with a single point of contact and ending with a single invoice.

Training and Support

Webwork works hard to be your partner in online research therefore training on all our platforms is personalized, one on one, and always free. We always provide a Webwork host who is expertly trained on our platforms and who will attend all interviews, assist with the technology, start and stop recordings, introduce your moderator and welcome respondents, as well as help with anything else you may need!

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Online tools and applications

Here are examples of a wide range of tools and applications developed for general purposes that are often used in conjunction with qualitative research. Most of these were suggested by qualitative researchers who share tips and best practices on the members-only online QRCA Forum on www.qrca.org - one of the most popular benefits of being a member of the Qualitative Research Consultants Association.

CAMTASIA - used primarily to make training videos - records onscreen activity and provides editing tools - useful for capturing any on-screen video - www.techsmith.com/camtasia.html

CLONEZILLA - free - creates a backup image of any drive to restore in case of failure - works on any platform/OS - may require software skills - www.clonezilla.org

DOODLE - free - efficient tool for arranging meetings based on their availabilities across various time ranges - www.doodle.com

DROPBOX - for file transfers - multi-platform - installs as a directory/folder on your computer and acts like a local folder but files are actually saved remotely - synch folders across multiple computers and share folders for large file transfers - www.dropbox.com

ECHOSIGN - makes it possible to quickly sign and return docs (such as non-disclosure agreements or participant agreements) without scanning - www.echosign.com

EFAX - basic service free for receiving faxes, free trial for send/receive service - allows you to receive faxes in your email and print from there - www.efax.com

EVERNOTE app - for sharing notes across Mac, iPad, iPhone - www.evernote.com

FILEZILLA - free - open source FTP (file transfer protocol) software to upload to web servers - www.filezilla-project.org

FREECONFERENCE - free - get your own conference number for free - each party pays the long distance charge - www.freeconference.com

GIMP - free - open source software for cropping/resizing/manipulating files and saving them to various formats - can grab sections of a screen - www.gimp.org

GRAB - included in MAC OS - captures and saves screen shots

INQSCRIBE - view and transcribe video in the same window, insert time codes into transcripts and jump to the same spot in a video, add subtitles to movies - www.inqscribe.com

INSTAPAPER - free - saves any web page/article to your custom newspaper - www.instapaper.com

KLOK - free - time tracking software www.getklok.com

MINDMAPPING software
• Mindjet MindManager – www.mindjet.com
• Inspiration - www.inspiration.com
• NovaMind - www.novamind.com
• MindMeister - free - www.mindmeister.com
• Freemind - free - www.freemind.sourceforge.net

NOTABILITY iPad app - for taking notes on a PDF - www.gingerlabs.com/cont/notability.php

PERSONAL BACKUP - free - helps you create backups on Windows systems - http://personal-backup.rathlev-home.de/index-e.html

PICASA - free - photo management software from Google - set up albums to share with others - picasa.google.com

PINTEREST - free - create (or let participants create) online collages ("pinboards") with images from the internet and post comments - great way to visualize stories/reports - www.pinterest.com

PREVIEW - free - included in Mac OS - crop/resize/manipulate files and save them to various formats

SKYPE - free - Voice Over IP for voice calls, conference calls, chat/Instant Messaging, and file transfers over the internet - also paid features for calling phone numbers worldwide - www.skype.com

SNAGIT - captures screens including long windows as well as online video - includes simple editing and tagging tools - www.techsmith.com/snagit.html

SNIPPING TOOL - in Windows Vista OS under Programs>Accessories - capture screen shots and save as JPGs

SONGBIRD - a music player (similar to iTunes) that works on Windows, Mac and Linux - www.getsongbird.com

SPERRY SOFTWARE add-ins - for sending mass emails individually, scheduling emails automatically with Outlook, etc. – www.sperrysoftware.com

SUPER© - free - convert (encode) and play any multimedia file - www.erightsoft.com/SUPER.html

TUNGLE – free – calendar tool that permits others to book appointments in your calendar – syncs with most calendars – useful for booking individual interviews – www.tungle.me

VIDEO DOWNLOAD HELPER - free - a Firefox add-on that can capture a video from the Internet and save it to your local computer - www.downloadhelper.net

VIDEO EDITING
• VEGAS PRO (for Windows) -
    www.sonycreativesoftware.com/vegaspro
• FINAL CUT PRO (Mac) -
    www.apple.com/finalcutpro

VLC Media Player - free - open source and available for all platforms - www.videolan.org/vlc

WORDLE - free - create word cloud pictures - users can edit or consolidate text from transcripts, online forums, blogs, etc., and generate word clouds - www.wordle.net

YOUSENDIT - basic service free - upload large files and notify recipients to download them - overcomes email attachment size limits - www.yousendit.com

ZAPD iPhone app - free - create websites from templates right from your iPhone - participants can use it to create websites of their experiences - www.zapd.com

ZOHO - some tools are free for small users - offers a large suite of online project management tools - www.zoho.com