Online Focus Groups Training Module

We conduct online focus groups in our virtual focus facility (VFF). Online focus groups typically require a lead-time of 14 days. This includes developing and programming the screener, recruiting, sending invitations, and holding the groups. It may take more time, depending on where the sample originates and how difficult it is to find qualified participants. Refer to the Task List on the next page to see what should be done on each day of the schedule

The Process

The process for setting up online focus groups includes programming, screening, recruiting, developing the guide, Moderating, and writing a report. At the end of this manual (and in the users\Focus Groups folder) are the following examples for your reference:

- *Invitation to the screener*
- *List of rooms, usernames, and passwords*
- *Email invitation to the focus group*
- *Sample merge files spreadsheet*
- *Sample approval form*
- *Invite Spreadsheet example*
- *Reminder call script*
- *Participant Spreadsheet example*
- *List of Phrases (.lop) example*
- *List of URLs (.lou) example*

Read The Bid

Before starting any study, READ THE BID. The bid details the scope of the project. If the client requests something that is not included in the bid, please tell them that you will need to consult your manager. Your manager will consult with the Research Director to determine if additional charges are necessary. (If so, the client will need to sign off on the additional costs before you can proceed.)

Identify The Research Objectives

The first thing you need to do before you can begin to design the screening questionnaire is understand the client's research objectives, which should be outlined in the bid. Contact the client to confirm and clarify the specifications before you begin. This information also will help you write the first draft of the Discussion Guide.

Focus Group Task List

			Day #	
	Task#		Start	End
MR Director	**1**	Receive signed bid. Project Director assigned	1	
Accounting	**2**	Log new project and note revenue to be recognized	1	
Exec. Admin	**3**	Create a job folder	1	
Accounting	**4**	Ensure client is billed for 25% of project + incentives	1	
(Proj. Dir.)	**5**	Conference call with client to confirm screener specs & study objectives	1	
(Proj. Dir.)	**6**	Write screener on paper and review with Manager	1	
(Proj. Dir.)	**7**	Email client the project schedule and written screener	1	
(Proj. Dir.)	**8**	Client approves written screener. Begin programming	2	3
(Proj. Dir.)	**9**	Identify sample source and order/place request	2	3
(Proj. Dir.)	**10**	Program online screener	2	3
(Proj. Dir.)	**11**	Test online screener	3	4
(Proj. Dir.)	**12**	Client approves online screener (*Signature required)	5	6
(Proj. Dir.)	**13**	Start recruiting (Send email invitations)		
(Mod)	**14**	Write Discussion Guide	5	7
(Proj. Dir.)	**15**	Write screener invitation and send out emails	7	
(Mod)	**16**	Get final approval of the Discussion Guide	7	10
(Proj. Dir.)	**17**	Client reviews Discussion Guide and makes changes	10	12
(Proj. Dir.)	**18**	Confirm with Accounting that 25% of payment + incentives received	10	
(Proj. Dir.)	**19**	Schedule the groups & confirm admin available	10	
(Proj. Dir.)	**20**	Send out instructions to qualified participants	11	0
(Proj. Dir.)	**21**	Create the "Invitation Spreadsheets" for internal tracking	8	10
(Proj. Dir.)	**22**	Create "Participant Spreadsheets" for the client	11	
(Proj. Dir.)	**23**	Email the schedule, instructions, & Participant Spreadsheets to client	11	
(Proj. Dir.)	**24**	Remove screener from the Web (post "Recruiting is Over")	11	
(Proj. Dir.)	**25**	Track responses, exit sheets, etc. - Keep manager informed.	11	14
(Proj. Dir.)	**26**	Final Discussion Guide approved by client	12	
(Proj. Dir.)	**27**	Create Discussion Guide .lop file, upload to Web, and *TEST*	12	
(Proj. Dir.)	**28**	Receive images from client. Setup, upload, and *TEST*	12	
(Proj. Dir.)	**29**	Create URL .lou file, upload to Web, and test	12	
(Proj. Dir.)	**30**	Make reminder calls to all participants (min. 5 hours before group)	14	
Mod/Admin	**31**	Hold groups		
(Proj. Dir.)	**32**	Download and clean transcripts. Send to client	15	
(Proj. Dir.)	**33**	Give updated copy of Invitation Spreadsheet to Panel Admin.	15	
Panel Adm.	**34**	Note in the panel database who participated in the focus groups	15	
(Proj. Dir.)	**35**	Notify Accounting who to pay and how much	15	
(Proj. Dir.)	**36**	Update the Discussion Guide	15	
(Proj. Dir.)	**37**	Update Participant Spreadsheets to reflect just those who participated	15	16
(Proj. Dir.)	**38**	Notify Accounting when project ends	15	

Accounting	**39**	Final bill to client	15	
(Mod)	**40**	Draft Topline Report (if requested) and give to Manager for review	15	17
(Mod)	**41**	Final changes made to Topline. Send via email to client	18	19
(Mod)	**42**	Draft Full Report and give to Manager for review	15	19
(Mod)	**43**	Final changes made to Full Report. Send via email to client	20	25
Accounting	**44**	Incentive checks mailed	20	

The Screening Questionnaire

SAMPLE SCREENING QUESTIONNAIRE

Welcome to our online screening questionnaire!

Tell us what you think and you could be eligible to participate in an online focus group. Eligible respondents who are selected and participate in the focus group will receive $75! This brief questionnaire takes less than 5 minutes to complete. All answers will be kept strictly confidential.

1. Please give us your primary e-mail address. (Please use your full address - e.g., chris@rci.com.)
Please make sure it is typed correctly so we can contact you if you are eligible to participate in the online focus group. ______________________

2. When was the last time you participated in a focus group?
Within the last 3 months **--->Terminate**
3 - 6 months ago
More than 6 months ago
Never

3. Are you or any member of your family employed in any of the following businesses?
(SELECT ALL THAT APPLY)
Marketing Research **→Terminate**
Advertising or Public Relations **→ Terminate**
Finance or Investment management **→Terminate**
None of the above

4. Are you
Male
Female

5. How old are you?
_______ years **→ Terminate if under 25 or over 54**

You may qualify to participate in our online focus group. The focus group will be scheduled for one of the following days. Please indicate what days and times you will be available to participate. ALL TIMES ARE EASTERN STANDARD TIME (EST) PLEASE SELECT ALL THE DAYS AND TIMES THAT YOU ARE AVAILABLE

(List possible group dates)
I am not available any of these days and times.

If you are available at any of the above times please give us your name, daytime phone number and evening phone number, in case we need to contact you on the day of the group.

Name ______________________

Daytime phone number (Including Area Code) (tab between fields) ___ ___ ____

Evening phone number (tab between fields) ___ ___ ____

Programming the Online Screener

Once the screener has been written and approved by the client, it needs to be programmed. When programming, please remember the following:

- Name the study something generic and unrelated to the client's name, the topic, or the brand;
- Write the screener introduction as: "Welcome to our online screening questionnaire! You may be eligible to participate in an online focus group on ______, 2002. Qualified respondents who are selected and participate in the focus group will receive $___!"
- Catch people who disqualify. Always set up a hidden question to catch people who disqualify, back up, and change their answer to continue.
- Allow for flexibility with the requirements. When developing a screener questionnaire, you should be aware of any requirements that are potentially flexible. If the client wants 35-45 year olds, for example, don't automatically disqualify someone if they enter a different age (e.g. 34). Tag them in a hidden question that assigns a value of "x", and allow them to continue through the survey. Also take all disqualified respondents through a hidden question just before the end of the survey to "tag" them as disqualified (this makes it easier to sort fully eligible respondents from the disqualified ones in the data file). When reviewing the final data file, delete everyone who did not qualify. If you are short a few people, you can ask the client is s/he wants to consider including some of those people.
- Reiterate to respondents that they MAY qualify before asking for day/time availability: "We will be holding an online discussion and you <u>may</u> be eligible to participate. If you are selected to participate, we will contact you via email. If you receive an email notifying you that you qualify, and you participate in the group, we will pay you $__ for your time! The group will last 1-1/2 hours. On which of the following days and times would you be available to participate?"
- Ask each respondent for his/her <u>name</u> and <u>phone numbers</u>. Both the day *and* evening phone numbers of respondents should always be requested after they indicate what times they are available. It is a requirement for participation that each person provides at least one phone number, and his/her name.
- Always thank the respondent. The last page of the screener should state: "Thank you for your participation. Your input is greatly appreciated. We will notify you by email if you qualify to participate in the online discussion. To exit this questionnaire, please close your browser."