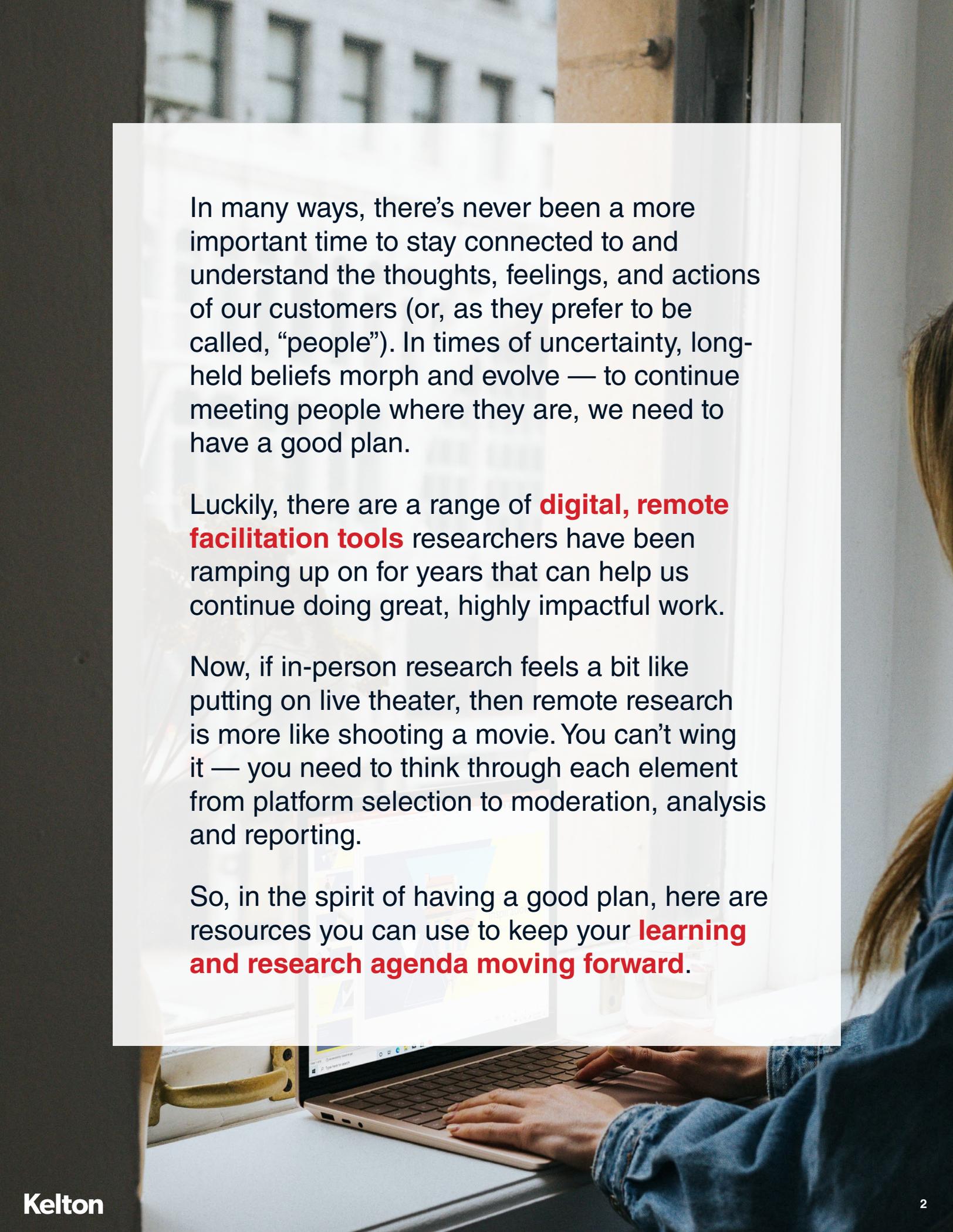


# A Step-By-Step Guide to **Qualitative Research & Remote Workshops** During a Pandemic



**Kelton**



In many ways, there's never been a more important time to stay connected to and understand the thoughts, feelings, and actions of our customers (or, as they prefer to be called, "people"). In times of uncertainty, long-held beliefs morph and evolve — to continue meeting people where they are, we need to have a good plan.

Luckily, there are a range of **digital, remote facilitation tools** researchers have been ramping up on for years that can help us continue doing great, highly impactful work.

Now, if in-person research feels a bit like putting on live theater, then remote research is more like shooting a movie. You can't wing it — you need to think through each element from platform selection to moderation, analysis and reporting.

So, in the spirit of having a good plan, here are resources you can use to keep your **learning and research agenda moving forward.**

# The Basics: They Stay the Same

**While a lot has changed, plenty hasn't.** The basics of good qualitative research remain the same:

- **Logistics:** Well thought-out discussion and facilitation guides are crucial for moderating and leading conversations in real life and in digital environments — as are smart recruits that get you in front of the right people.
- **Moderation & Facilitation:** Digital environments, like real life, also require great moderators and facilitators. Putting people at ease, building rapport, being sensitive to very real emotions, and getting at deep insights remains both an art and science.
- **Collaboration & Smart Synthesis:** To make sense of what we learn from participants, you can't do it alone. Thanks to a range of technologies and tools like **Mural**, where we collaborate is shifting but the outcomes remain the same.
- **Compelling Reporting:** To do right by consumers, we still need rock-solid, evocative, narrative-rich reporting to mobilize our teams and colleagues to take action. This is a time to be creative. Experiment with new mediums for insights storytelling — like videos, photos, microsites, and even **animated gifs**.

Some remote research methods even offer advantages over in-person research, as long as they are approached with thoughtful planning and execution.



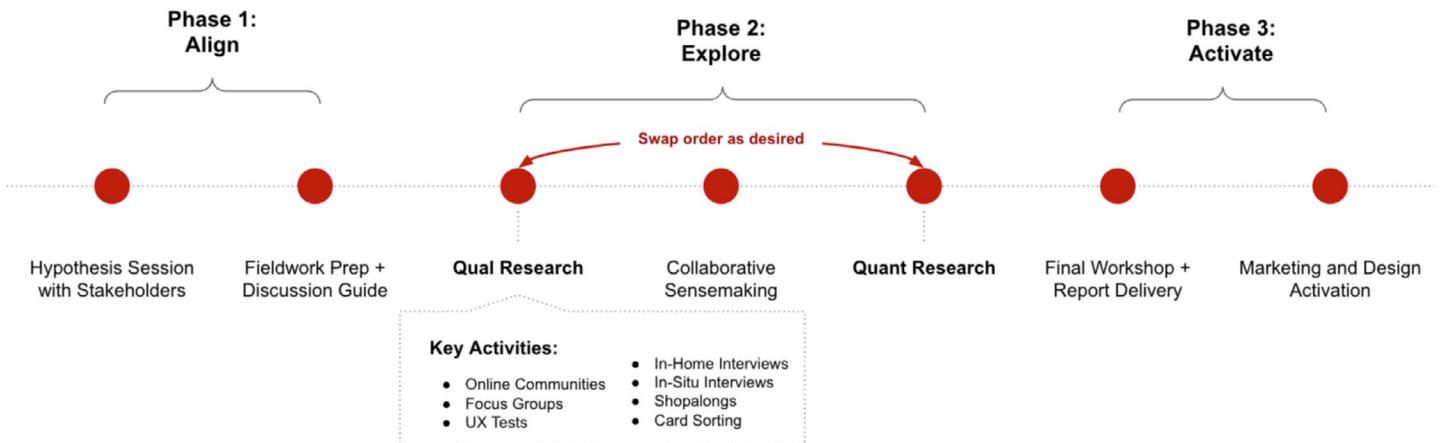
# The Pivot: What Changes in the Shift to Digital

While you still need all of the above, how we execute research does require **new tools, workflows, and creative thinking:**

- **Technology:** The big one. Despite all the digital tools out there, nobody designed the perfect research platform for a pandemic. You need to work with your partners to think creatively about stitching different tools together to accomplish research tasks.
- **Logistics:** As you take research online, be ready to manage things like technical difficulties, ensure creative research activities are articulated clearly in your guide, and that everyone knows their role while facilitating, participating, or listening in.
- **Methods:** What worked a month ago may no longer be appropriate. There are a lot of approaches we recommend, and quite a few we'll tell you just aren't appropriate or safe right now. But that doesn't mean they're off the table forever — we'll cover a range of creative workarounds below.
- **Accessibility & Usability:** As we go digital, we need to have a UX mindset. Is the platform easy to use for my participants? Are my questions and instructions clear? Test your plans and platforms with your partners and consider doing dry runs to pressure test bandwidth and system nuances. If you're working with participants with different physical or cognitive abilities, make sure your activities adhere to **[Section 508 web design compliance](#)** so all can participate from afar.

# Digital Approaches: Designing Remote Qual Research for Rich Insights

Where we conduct research has changed, but the process remains the same. Below is a simplified overview of a typical mixed methods project Kelton runs. From here, we'll map out tools you can use to maintain your process but evolve your qualitative methods and activities to match the moment:





# PHASE 1: ALIGN

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Alignment is where you, your team, and your partners all get on the same page about the goals of a research initiative. You generate hypotheses, cataloging what you know, what you think you know, and what you hope to learn through the work — and then you move into recruiting, prep, and guide development. In the current context, there's some great news: very little here needs to change!

# PHASE 1: ALIGN

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You may have found yourself working through new challenges while struggling to establish new norms for collaborating with teams as effectively as you used to.

So have we – here are three lessons we’ve learned for how to run more collaborative work sessions from home (sweatpants optional...):



## Tips

- You'll want two things: a web conferencing platform + a collaborative whiteboarding platform. This allows everyone to be heard — and you can whiteboard takeaways in real-time together.
- Setup a template for your hypothesis session activity on your whiteboarding platform beforehand.
- Establish ground rules for how to participate and share thinking.
- Assign roles so you know who is facilitating and who is capturing the conversation on the whiteboard.

## Tools We Love

- **Web Conferencing:** Anything reliable will do — we use **BlueJeans**.
- **Collaborative Whiteboarding:** We love **Mural** (more on that on the next page).

# PHASE 1: ALIGN

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## 1. Over Prepare

We said it once so we'll say it again: If in-person facilitation feels like putting on live theater (or improv in some cases!), **then remote facilitation is like shooting a movie**. Preparation is everything.

**Write a guide for the key topics you'll discuss.** Running an effective remote workshop is like moderating a focus group. Write a simple guide, know how you'll transition between topics, and have some questions in your back pocket to generate new discussion.

### Tip

**For each topic, think of having both an open-ended and more directive framing to fall back on.** If you're asking, "What stood out to you from that presentation?" have another question ready that is more provocative, such as, "What is the one thing that mattered to you in that presentation?"

**Create templates.** Whether you're using a Google Doc or a complex **Mural** board, create a template that mirrors your plan. Keep these activities simple and flexible, yet focused and structured.

### Tip

**Take a look at the template we start from for our Ignition Sessions.** These sessions align our goals and objectives with those of our clients, capture stakeholders' visions for success, and surface hypotheses going into the work.

**Structure stakeholder input.** If you are leading with a presentation, structure your participant input through a worksheet, survey, or **polling platform** to capture reactions and get participants thinking before the discussion begins.

### Tip

**Build a framework for capturing notes that is parallel to your digital workspace** – this way everyone's thoughts naturally slot in to structure you've already built.

## 2. Thoughtful facilitation is more important than snazzy tools...

Facilitating an effective remote meeting or workshop takes small adjustments to your facilitation style. Making the right adjustments keeps remote sessions productive and engaging.

**Provide rules of engagement.** It helps to remind participants of the hurdles in remote work. Outline a recovery plan for any technical issues (which are bound to happen!), and give guidelines for sharing airtime in a remote conversation, where there are greater delays and pauses in the conversation.

### Tip

**Include a slide with a note on technical issues and a plan for recovery,** encourage a constructive “Yes, And” mindset, and remind remote participants to be mindful of speaking over each other and letting one another finish their thoughts.

**Be directive.** Like a focus group, if needed, call on people. As a remote facilitator, you’ll need to actively manage the conversation. Be ready to actively make sure everyone is being heard and everyone has the space to contribute.

### Tip

**Say things like “who haven’t we heard from yet?”** or “Let’s hear some new voices on this next one.”

**At the same time, embrace silence.** Because we can’t read each other’s body language over webcam as well as we can in person, it can be tricky to know when it’s your turn to talk. If you ask a question or give participants something to react to, just wait. Resist the urge to fill silence. Someone will fill the dead air.

### Tip

**The old “10 Second” rule for facilitation applies here.** If you ask a question, stay silent for 10 seconds. Give participants time to think and work up the courage to jump in.

# PHASE 1: ALIGN

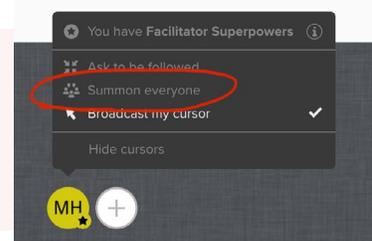
## 3. ...but the right tools do matter.

To run an effective remote meeting or workshop you need two tools at minimum: a communication tool (we encourage video!) and a shared workspace. Here are some tips and tricks for getting the most out of your remote collaboration space.

**Know when to share your screen vs. invite everyone in.** One important question to answer when using Mural, Google Docs, or any other collaboration tool is how necessary is it that everyone be in the tool working together? It's often more effective to share your screen to capture the conversation and ideas. Other times, it might be necessary to open the floodgates and let everyone add their thoughts in together.

**Tip**

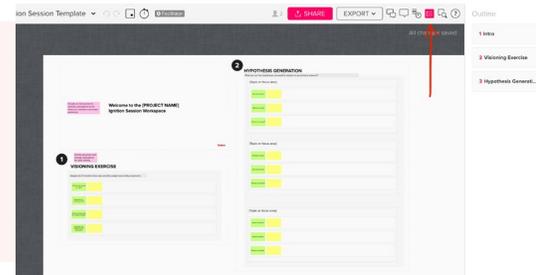
If everyone is an active contributor, in Mural, use the “**summon everyone**” feature to bring everyone to the same viewport. With everyone in the same place you can command everyone’s attention when you shift between topics.



**Assign a scribe.** When you're facilitating using a digital collaboration space it helps to have a teammate who is the dedicated scribe. It's a lot for one person to both facilitate and capture the conversation.

**Tip**

Mural's outline feature is a great way to make managing the flow of the conversation easier. By pre-setting views, and using the outline to jump between them, you can focus even less on the tool, and give more attention to the conversation.



**Learn the right Hotkeys.** Mural has a ton of simple hotkeys you can use to make facilitating easier. For instance, by double clicking or hitting the “tab” key, you can quickly generate new digital sticky notes. By pressing “d” you can enter or exit draw mode to turn your cursor into a digital dry erase pen.

**Tip**

Getting started with Mural is easy, and by playing with the tool you can get the basics down very quickly. To master Mural, [their video tutorials](#) do a great job educating on use of more advanced tools for facilitation.



# PHASE 2: EXPLORE

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Here's where things get tricky. There are a LOT of tools out there — many of which promise they'll solve all your research challenges. Some will, most won't.

But, with the right creative thinking, you have a lot of options you can stitch together in creative ways to get truly impactful insights. You don't plant a garden with one tool, you need a few to get the job done.

# PHASE 2: EXPLORE

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Here are the tools we use and a few others to consider:

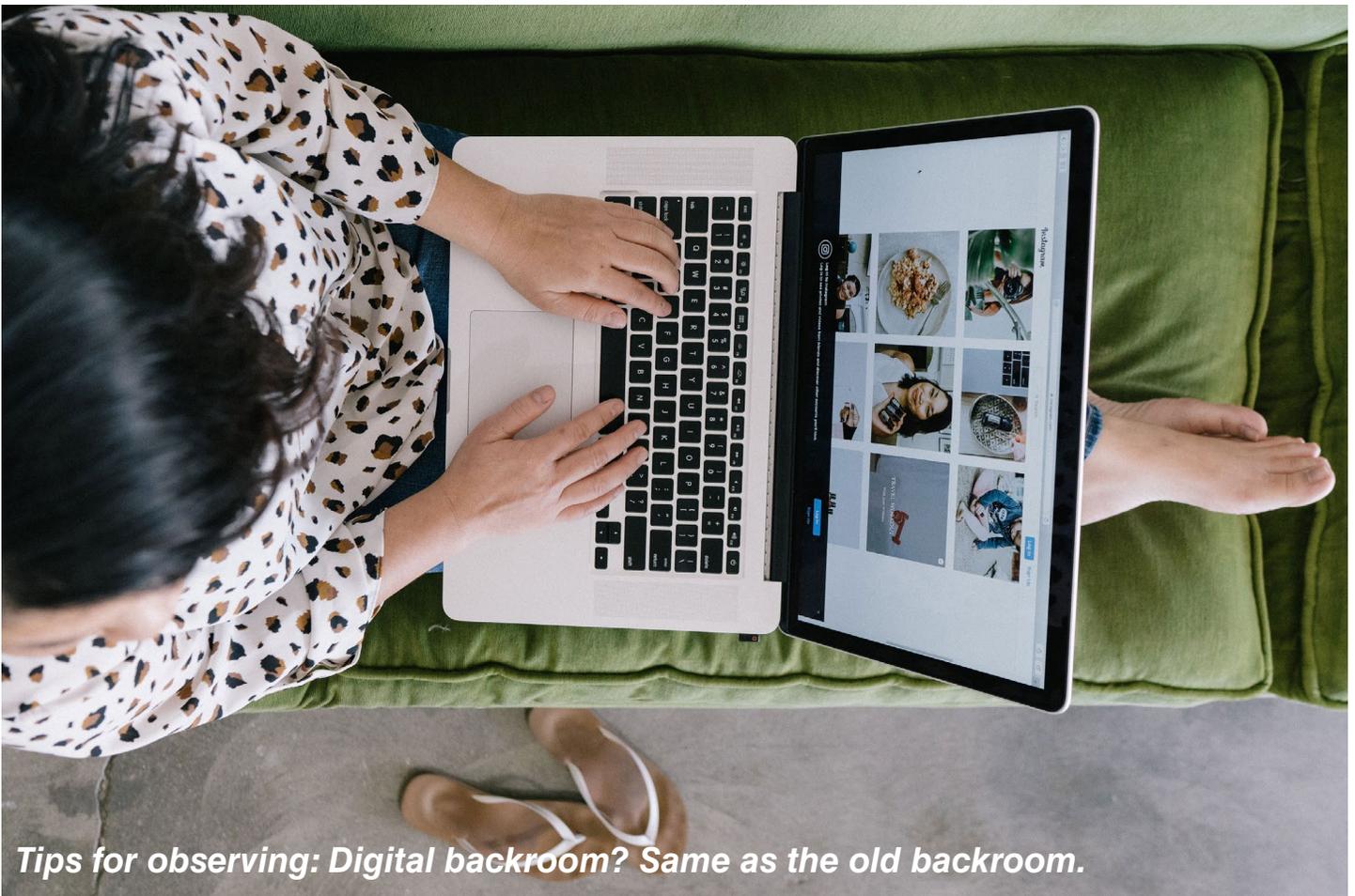
- **Online SmartCommunities:** SmartCommunities are great for getting incredibly deep insights and talking to many participants over a length of time (we do anything from 2-day to 2-month long studies). Each day can be a mix of journaling, photo/video share-outs, and creative exercises — many of which can be done easily and safely from home. [Recollective](#) is our go-to platform for these.
- **In-depth Interviews & Focus Groups:** For having live conversations with one participant or many (think digital dyads, triads, or full-on focus groups), you have a few options. Depending on the topic, there's the path of least resistance (i.e. use any web conferencing platform) or there are options that give you everything you need to run polished, highly professional groups — complete with digital back rooms for your team, card sorting, whiteboarding, and polling. [Discuss.io](#) is our go-to platforms for these.
- **In-Situ & Shopalongs:** There's a time and a place for research, and in a moment of social distancing we'd encourage you to find a range of creative exercises that can approximate in-situational interviews, without asking participants to venture outside until their local governments recommend it. BUT, when it's safe to start sending folks out, Mobile Missions are the way to go. For now, you can do a lot of in-context observational work in-home. Whether at home or out-and-about, [d.Scout](#) is our go-to platform for these.
- **UX Testing:** Ahh, UX testing. Here's the good news: Now might be one of the *best* times to **focus on UX testing and optimizing key digital touchpoints**. There are two routes you can go: (1) Remote, live moderated (great for getting rich context) or (2) Remote, unmoderated (great for doing high-volume tasks analyses). Whether moderated or unmoderated, [Validately](#) is our go-to platform for UX testing. Depending on your needs, also consider [UserZoom](#), [UserTesting.com](#), [Lookback](#), or [Maze](#).
- **Card Sorting:** Card sorting is an incredibly powerful tool in the researchers' toolkit. It's not right for every project, but where you need to have participants rank options, categorize ideas into themes, or go deep on the information architecture of an experience, card sorting is ideal. For card sorting, our go-to tools are [FocusVision's Intervu](#), [Mural](#), [Miro](#), or [OptimalSort](#).
- **Creative Co-Creation Activities:** Finally, none of the above are substitutes for creative thinking. Some research methods you know and love, simply, are not appropriate in the current context. Even so, we believe with a good narrative, strong facilitation, and creative preparation there's very little we can't test, explore, or unpack with consumers and users.

*Planning a remote focus group? Here's what works, what doesn't, and what to expect when conducting remote research.*

# Planning, Preparing, and Conducting Focus Groups

What we're learning in a COVID-19 world via remote focus groups is as powerful — if not more so — than groups conducted at a facility or out in the field. With this format, we have a unique chance to see a close-up, in-context view of our consumers. **By losing the sterile environment of a focus group**, we can engage in rich conversations with consumers where they're most comfortable — their own home.

As you prepare to moderate or observe a digital focus group, here are some of our tips for making sure it feels just as good — or better — than an IRL focus group.



*Tips for observing: Digital backroom? Same as the old backroom.*

# PHASE 2: EXPLORE

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## 1. Set expectations

The same rules apply — everyone, from the moderator to the backroom observers, needs to be on the same page. But there are some important differences in setting expectations for a remote focus group.

For instance, make sure your team is familiar with the platform before go-time. Provide everyone with step-by-step instructions to get set up and situated so the tech isn't a distraction and they can focus on the conversation. Consider also providing a document that simplifies log-in, essential feature use, and communication options so everyone's on the same page heading into groups.

### Tips

- **Practice makes perfect:** Set up a dry run with your focus group platform provider prior to your first group, to make sure everyone is comfortable logging in and using the software.
- **Leave no stakeholder behind:** Give your team clear direction on how to log onto and get acclimated with the platform. Use screenshots and captions when possible to help explain.
- **The future is here:** Point out useful features that clients can utilize like a backroom chat box or the ability to time-stamp videos. No more knocking on the door and handing sticky notes to the moderator — from asking questions to capturing video clips, a lot is streamlined during digital focus groups.



# PHASE 2: EXPLORE

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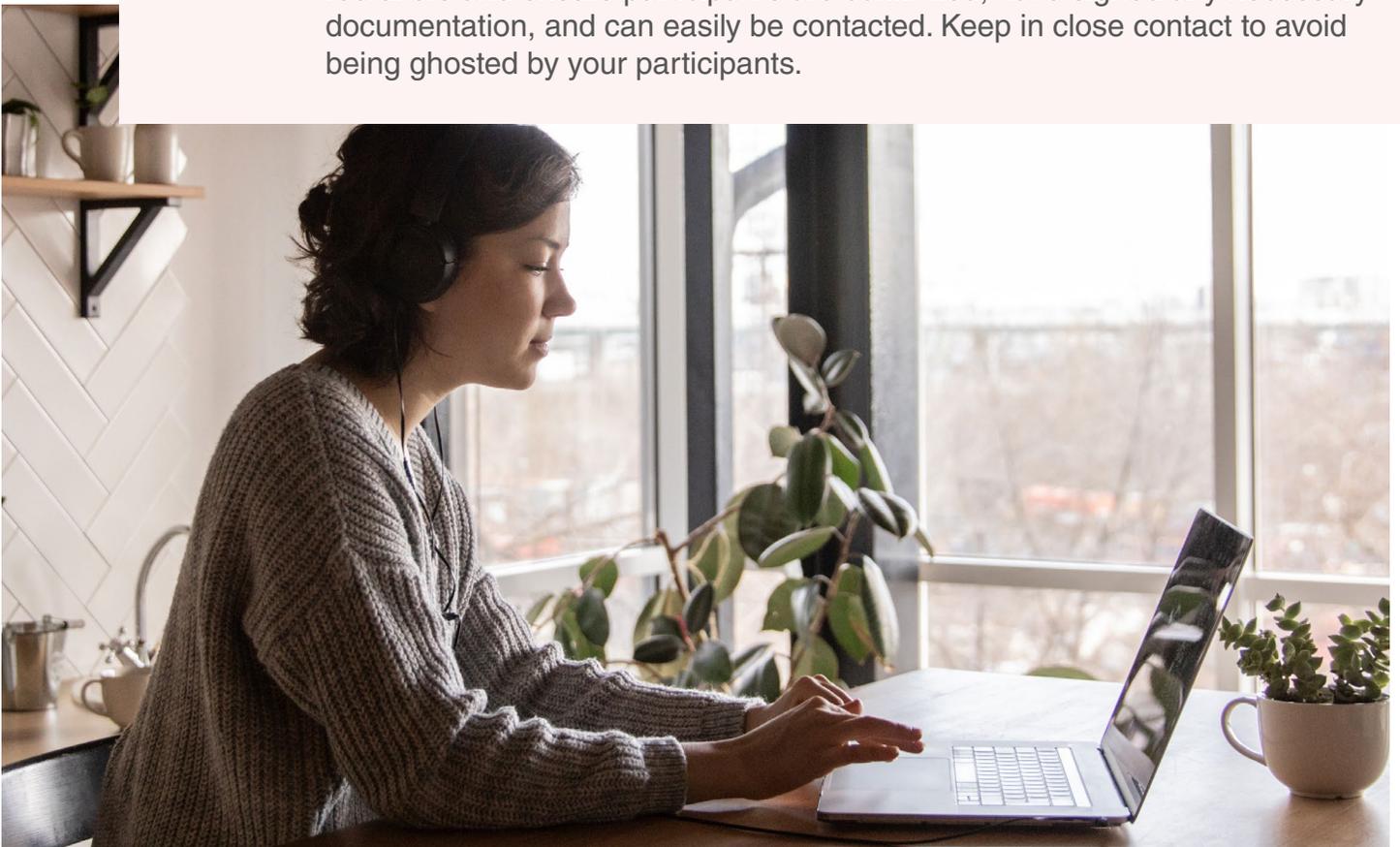
## 2. Over-communicate

With in-person focus groups, it's easy to have side conversations in the backroom and start identifying key themes together. Online, it's a bit trickier.

It's crucial that you build-in prep and debrief time before, during, and after digital sessions. These team debriefs offer critical time to reflect on conversation, identify initial takeaways, and make tweaks to guide flow.

### Tips

- **Schedule your debriefs:** Set intentional 10-15 minute debrief meetings with stakeholders after each focus group to discuss and iterate. If you don't, it's way too easy for everyone to log off and disappear until the next group starts.
- **Structure your “listen for” ahead of time:** Share an observational worksheet with your team — make sure it spells out important things to listen for, which will aid in keeping debrief sessions productive.
- **Manage the details:** It's also critical to maintain constant communication with recruiters and ensure participants are confirmed, have signed any necessary documentation, and can easily be contacted. Keep in close contact to avoid being ghosted by your participants.



### 3. Roll with the (tech) punches

As with in-person focus groups, there will inevitably be small hurdles that come up — with remote groups, it's just more likely your hiccups will be due to technical difficulties (don't panic, you anticipated this!).

Remote focus group providers know these things happen and are there to help you troubleshoot. Reassure your stakeholders that small issues will pop up from time to time but that you'll get them smoothed out as quickly as possible.

#### Tips

- **Follow a tech troubleshooting checklist:** Do your homework — ask your focus group support team questions beforehand, so you can go in as prepared as possible. Here are some helpful questions to ask:
  - Who should I contact in case of a tech issue, and what's the best way to contact them?
  - What are the most common tech issues customers experience, and how do we resolve those issues?
  - Is there a backup dial-in for those who have bandwidth or data issues?
  - Are there browsers the platform functions better on (Chrome vs. Safari)?
  - Will the platform work differently for those using a Mac vs a PC? If so, how?
  - Who's responsible for getting participants set up and comfortable on the platform? Would it be possible to have them set up prior to the session? (Note: The last thing you want is for confusing platform UX or technical issues to cost you a participant).



*Tips for moderating: A great (remote) moderator is still worth their weight in gold.*

### 4. Lights, camera, moderate

Thinking back to our movie analogy, with remote focus groups, the moderator is both your director and lead actor. More than ever, they need to call the shots — guiding the conversation, managing who talks and when, and ensuring time is used to drill into territory that yields real, powerful insights.

As a moderator, it's important stakeholders and participants understand what to expect in a remote focus group setting. Participants may feel more comfortable off the bat joining from their own home (which is great!), but it's important to deploy some tried and true techniques for making sure everyone is heard:

#### Tips

- **Children, please raise your hand:** An “energetic” focus group is still possible without it sounding like a cacophonous cable news program. To limit cross-chatter and “over talking,” the moderator needs to set some rules. For instance, reiterate the importance of hand raising, waiting your turn, and trying not to talk over one another. Here's an example of dialogue a moderator can use to get this message across in the introduction:

*“My client and I are excited to hear all of your ideas today, and I want to make sure each of you is heard! If we were having this conversation in-person, it would be easy to tell when someone wanted to start talking or when they were ending their thought by reading their body language. Since we can't do that here, I need each of you to give me a quick hand raise in-camera to let me know you have something to add. That way, we can all hear each other out, and my colleagues and clients observing can follow along with our conversation. Sound good?”*

- **Be (even more) assertive:** A moderator's role now, more than ever, is to protect the silent within the group. Sometimes you get a participant who has a LOT to say, at the expense of others' participation. Be assertive — this kind of moderation should be more directive and less free flowing.
- **Listen, pivot, and probe seamlessly:** One benefit of a remote focus group is that backroom stakeholders can more easily communicate with the moderator. With our platforms, it's easy to shoot them a message or encourage quick follow up. For remote groups, moderators need to keep their eyes on the backroom chat box to ensure they're probing in the right places.



# PHASE 3: ACTIVATE

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Lastly, let's talk about how you bring it all together. Your teams aren't together, you're working in ways that feel foreign, and your home maybe — just maybe — is full of distractions (is your kid also your colleague? It's getting hard to tell...).

When it comes to activation, there are a variety of ways you can pull your team together, collaborate powerfully, align on priorities, and maintain a strong sense of momentum to push forward on your marketing, design, product, and business goals.

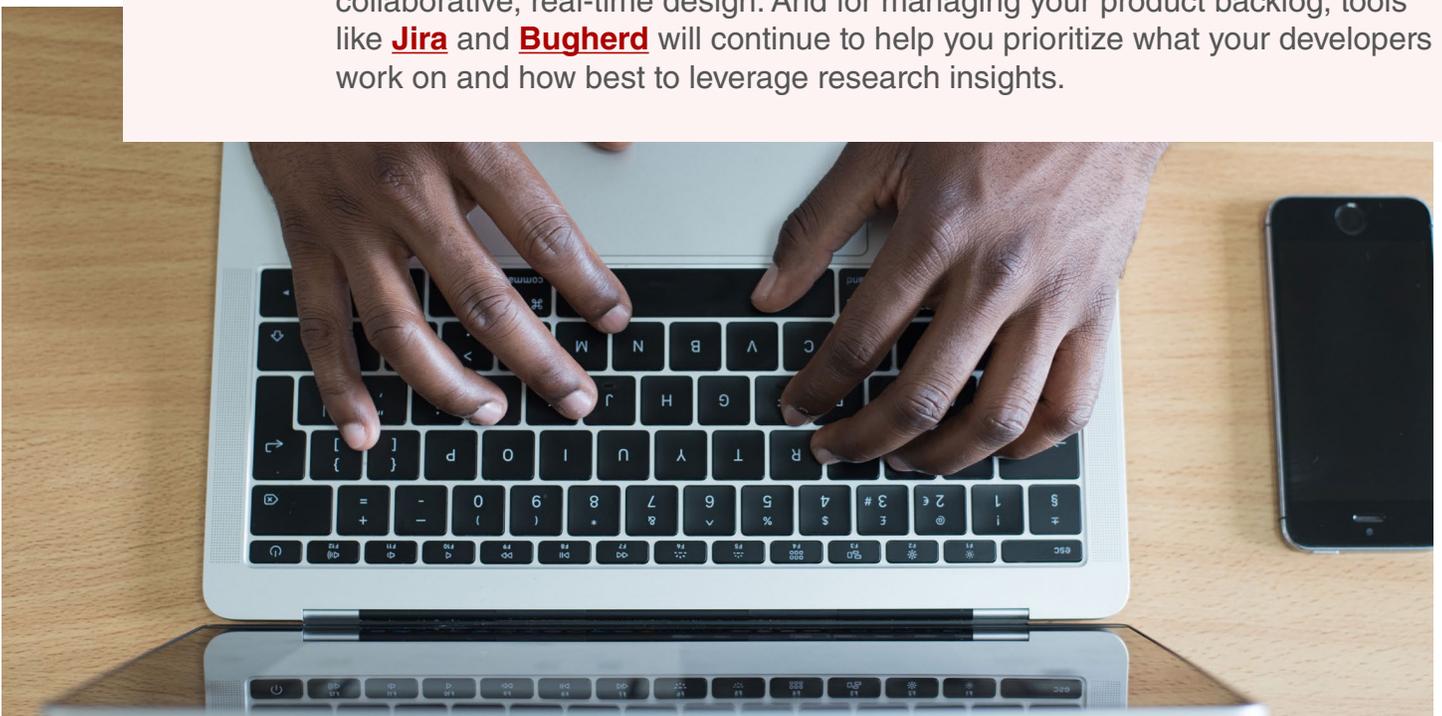
# PHASE 3: ACTIVATE

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Here's how you do it:

## Tips

- **Go back to the beginning:** There's no substitute for a good plan. Now is the time where meetings shouldn't simply happen — they should be designed. Bring intention to digital workshops through clear agendas and structured activities.
- **Knock out the basics:** Are y'all a **Microsoft OneDrive** or **Google Suite** tribe? We can't decide either, so we use both. But align on how you'll collaborate on documents and store files so you can review research simply and easily together.
- **Pick a (virtual) location:** To make the most out of group activation, align on a visual workspace you can all use. For us, **Mural** is a platform that can be used both to run remote alignment workshops, build **experience maps** in real-time together, and work collaboratively on complex problems across distances.
- **Spread the empathy around:** Can't go to your customers? Bring them to you: use **videos**, **photos**, **clip-watching exercises**, and **testimonials** gathered during the Explore phase to create activation sessions that inspire empathy and move your team to take action.
- **For all you (UX) designers and product managers:** The design world continues to move a mile-a-minute. While **Adobe Creative Cloud** remains in the mix, tools like **Sketch** and **Figma** are the tool of choice for collaborative, real-time design. And for managing your product backlog, tools like **Jira** and **Bugherd** will continue to help you prioritize what your developers work on and how best to leverage research insights.



# Being Heard Matters: Now is the Time for Research That is Deeply Human

Now is a time to go deeper on listening to your customers and understanding how you can be ready to meet their needs. Despite everything that's changing, listening remains a gift — an exercise in compassion and humanity that's needed now more than it was just a few months ago.

We think the **Wildcats said it best**: “we’re all in this together.” While budgets, priorities, and approaches feel uncertain, don’t hesitate to reach out to your partners and friends to help you think through the best path forward. Nobody gets to control the uncertainty, but together we can build a plan to navigate it.

We said it before and we’ll say it again: We love talking about this stuff. Reach out if we can be of help in designing insight-rich qualitative research.

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