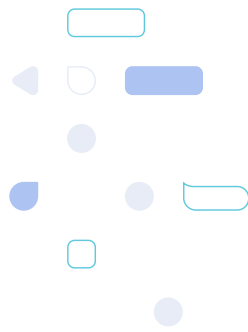


# Effective Research Guide Planning

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Before planning an online qualitative research project, we explain the top 10 things you need to consider - from recruitment to design and analysis.



# Effective Research Planning

*As a research professional, the considerations for planning an online qualitative research project aren't quite the same as those you'd need to think through for a traditional qual project.*

*In this introductory guide, we'll look at the top 10 things we recommend you consider before starting out planning an online qualitative research project. We'll cover the types of questions you should be concerned with at each stage.*

It's worth noting that this list is not intended to be a detailed "how to guide" for research design. Instead, it's purpose is to start the thought process and give you ideas to properly scope and prepare for your project in the following respects:

1. Participant On-boarding
2. Multiple Languages
3. Gamification and Point Attribution
4. Personalized Messaging and Personas
5. Activity Design and Sequencing\*
6. Real-Time Chat and Discussions
7. Questions and Task Composition
8. Integrating Video\*
9. Pacing and Time Commitment
10. Socialization and Participant Engagement

Not all of these topics are relevant in every project scenario but considering them will elevate your research communities in terms of content, design, participation and the resulting insights they produce. You will have a smoother project implementation and more successful experience overall.



# Participant Onboarding

*Every project needs its participants and every community its members! With regards to your online qualitative project, whether it's short or long-term, you'll need to find the right people and bring them online.*

The types of things you should be concerned with at this stage are:

- Do you need early onboarding access to build up the community, transition from another existing one or simply ensure everyone's in the same place and aware of what's in-store for when the project begins?
- Will you be integrating with a panel to bring participants on-site? Will any information be passed over during this process?
- Do you need help with the recruitment process and getting the right supplier to find the people you need based on project specifications?
- Do you have participant information from recruitment or a database that you'll want uploaded as custom profile fields and segments?
- Will you be onboarding participants yourself via email invite or providing a shared invitation link to be distributed or posted online?

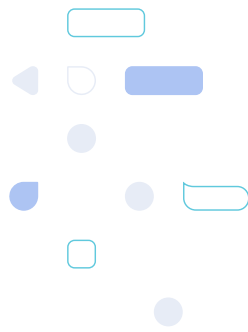


# Multiple Languages

*Taking your projects online not only brings convenience but also gives you extended reach. The ability to run concurrent or iterative projects across multiple markets and languages can all be done from a single site.*

If your projects span multiple languages, here's some things you'll want to consider:

- Does the project need to be a single multilingual community space or split out into a community space per language?
- Keeping things together is beneficial when your project just needs to be made available in different language options (e.g. projects in the US might offer English and Spanish alternatives and projects in Canada might offer English and French options)
- Splitting things out is more beneficial when multiple markets are involved often times requiring the need for external moderators as well
- Will there be different approaches to questions and exercises to account for cross-cultural differences?



# Gamification and Point Attribution

*Another intriguing aspect of online qualitative research is the ability to gamify your Study space. Leveraging point attribution, level attainment and leaderboards can help make your community more engaging for participants and help with incentives.*

If you're interested in using a community points system, you'll want to think about things like:

- Will points be used to prioritize and incentivize certain Activities and Discussions (e.g. bonus or project feedback exercises, entries in project usage diary, etc.)?
- Will points be used to prioritize certain types of responses (e.g. acknowledging the value video and photo uploads of plain text responses)?
- Will points be used to drive socialization by encouraging posts, comments and ratings amongst members?
- Will a participant leaderboard be beneficial to encourage community engagement?
- For long term communities, will the points be used to gauge incentive payouts based on levels of participation and reset incrementally?





## Personalized Messaging and Personas

To get the most out of your project and engage participants in a way that's truly conversational, you should try to tailor your communications in a way that's reflective of the different personas you're dealing with.

To keep your community members informed and engaged, the things you should be making sure to consider are:

- Do you have invite verbiage and clear communication introducing the community purpose and duration, participant expectations, rewards and incentives, etc. to be displayed on the community Home page?
- How will your guide verbiage engage and connect with people emotionally by being more conversational in tone?
- How will you create pathways of meaningful questions that are seen only by the relevant participants to ensure responses that are more insightful and precise?

# Activity Design and Sequencing

*Getting deeper into things, writing a research guide for online is also a little different than in-person. Whether it's having different pathways and content for different groups of people or sequencing related, online research affords you some extra design opportunities.*

In terms of Activity design and sequencing, some important questions to ask at this stage are:

- Will everyone be doing the same sets of questions or will there be certain exercises that will be specific to certain groups?
- Will there be any sets of questions that should act as a Journal Activity with repeat accessibility (e.g. each time you do or use x, please answer these questions...)
- Are participants thoroughly informed of what will makeup their repeat Journal entries and have they been given adequate instructions on what to catalogue for them
- In terms of release, will Activities be staggered to keep people on the same track or will everything be available at once affording people the convenience to do as much as they can and want to in a given community session?
- Will there be a forced order to Activities or will it be more of a blue sky approach with dates controlling what is and isn't available to participants?
- When sequencing is warranted, will all Activities be completed in a forced order or are there cases of ones that should be unsequenced (e.g. Journal Activity that is always available for entries)



# Real Time Chat and Discussions

*Integrating a real-time component into your project or making use of discussion boards are more flexible approaches in terms of personal expression and can help you tap into insights that are borne out of more organic communication.*

If you're considering using either of these options in your research design, here are some things to be thinking about:

- How will your project benefit from a synchronous component where participants are online and interacting together in real-time?
- What type of questions and content should you have drafted before the live chat (e.g. intro and outro messaging, questions for springboarding, photo and video content for review, polling questions to get at the numbers, etc.)
- Is there value in an open-ended space where participants post things in a more organic manner without designated response requirements (e.g. collaborative ideation and brainstorming exercises)
- What are the Topics of conversation for these types of cases and will you be controlling them or allowing participants to come up with their own?





# Questions and Task Composition

*Beyond making sure your guide touches on all the needed items from your identified research objectives, writing an online moderation guide should also try and cater to the medium and its possibilities.*

In terms of actual questions and exercises your community will be composed of, here are some key things to keep in mind:

- How can you make your design mobile first with shorter and more concise exercises?
- How can you streamline and impose structure on the more open-ended qualitative items by mixing in quantitative closed-ended questions?
- How can Task randomization and grouping be leveraged for concept testing designs?
- How can group based exercises be completed and socialized over?
- How can interactive and media based questions be integrated to avoid long text responses (e.g. projective techniques and mark-up exercises)



## Integrating Video

With online research today, the name of the game is video. Whether it's your participants or yourselves, integrating video into your research project will yield many positive results.

If you're looking to incorporate video into your research projects, ask yourself:

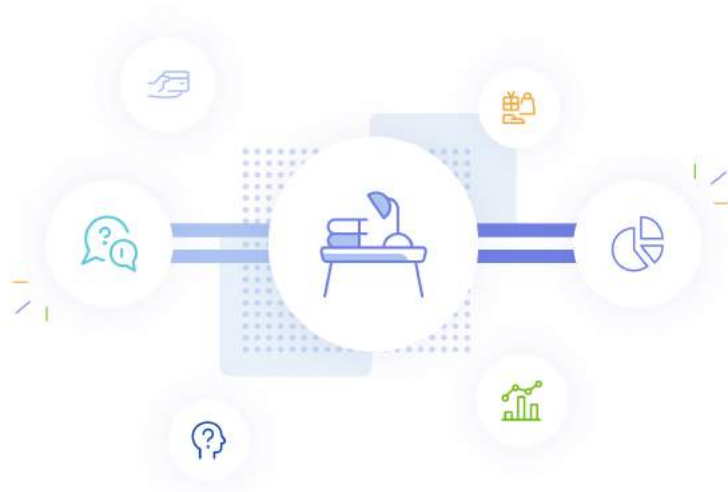
- Do I have a video introduction introducing the moderator and moderator team, the community, etc. to kick start the reciprocity principle and encourage others to record and submit video responses?
- Are there questions that would benefit from having additional video explanation with possible visual examples (e.g. exercises that are more dense or have multiple steps)?
- Are there questions where being able to see people's faces and hear their tone of voice would enhance the understanding of what's being sought after?
- Would reporting efforts be enhanced and insights delivery made more impactful with a video highlight reel of poignant participant responses?
- How can video (and other media laden exercises) be incorporated into the research guide (e.g. having people record their love or break-up letters)?

# Pacing and Time Commitment

*A big question surrounding online research projects is the time commitment aspect from both a participant and an administrative perspective. Not only is the overall time spent a factor but also the activity structure, segmentation and pacing can significantly impact on engagement and response rates.*

When planning your online research project, make sure to consider things like:

- How can we streamline our design so participants are engaged in meaningful questions exercises without the filler?
- Have questions and exercises been broken up into more but shorter Activity sets to make socialization more focused and built directly into the progression through the Study's Activities?
- Have you mock tested your design so that the time commitment being asked of participants is reflective of what they'll actually spend?
- Have you appropriately factored in the time it will take to perform the exercises as well as socialize to the necessary degree?
- Will you be providing an adequate incentive amount for the time commitment expected?
- Have you made sure you and your team have adequate time and resources to monitor and actively engage with the community (e.g. responding to inquiries, probing for deeper explanations, acknowledging participants and sending reminders out when needed)?

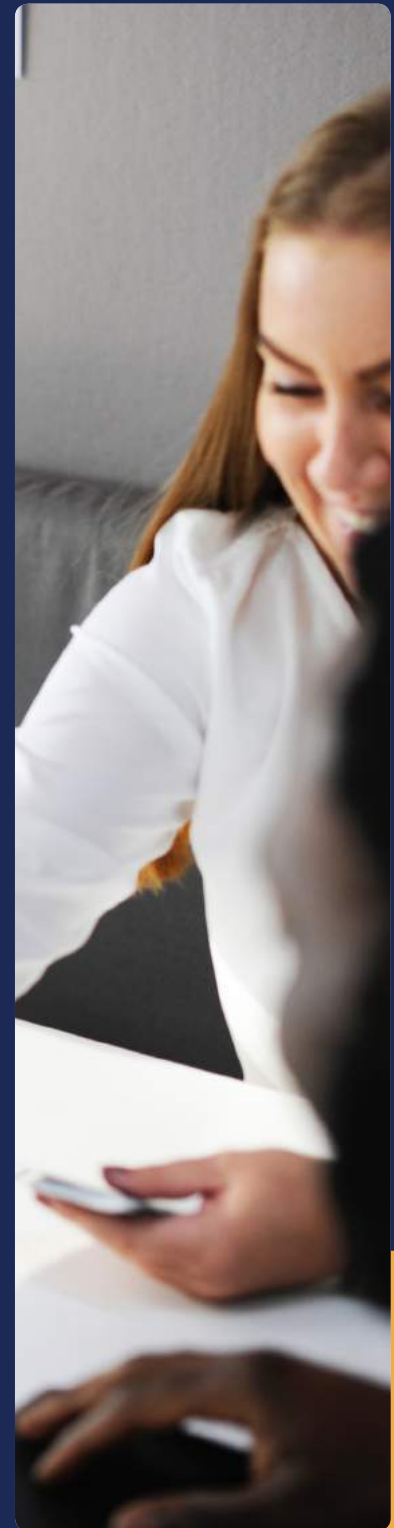


# Socialization and Participant Engagement

*One of the major advantages of community based approaches to online research is the ability to foster engagement and derive insight from individual back and forths between you and your participants as well as group level socialization.*

If your project is social in nature or you're just looking to keep people online and engaged, you'll want to make sure you think about the following:

- If your community is smaller in scope, how will you review and comment on participant responses and replies to ask engaging follow-ups, provide encouragement and acknowledge particularly articulate and well thought out answers
- If your community is larger in scope, how will you review and comment on enough content to keep people engaged and ensure things are kept on track?
- Will the project be served better with an inherent structure of socialization where they complete an Activity and then socialize, a more open forum approach leveraging Discussion Topics, socializing in real-time or a mixture thereof
- Will group socialization be beneficial and leverage @ mentioning to have many individuals interact over a highlighted response or reply (rather than just asking the same general follow-ups individually)?
- responses and replies to ask engaging follow-ups, provide encouragement and acknowledge particularly articulate and well thought out answers (since you likely can't review and comment on them all)



# Contact Us

*Email: [sales@recollective.com](mailto:sales@recollective.com)*

## **Or swing by for a coffee at:**

100 Queen Street, Suite 300

Ottawa, ON K1P 1J9

Canada

## **About Us**

Recollective is an award-winning software developer focused on marketing research and online communities. For over 20 years, we've worked with some of the world's largest and most ambitious organizations, continuously innovating our software and services as their requirements evolve. The result is a proven software platform that businesses depend on to meet their most critical needs—quickly, easily, securely and affordably.