

“Free at last – a new model of qualitative consultancy”

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1 The premise

The premise of this paper is that qualitative researchers and their clients could benefit from thinking more creatively about their core competencies. We usually think of ourselves as researchers first and foremost – generators of reliable and robust information – rather than as qualitative practitioners with a range of transferable skills. Much of the debate in qualitative research recently has focused on different ways of doing research – ethnography, semiotics, cultural analysis and un-moderated groups for example – but not on different ways of using qualitative skills. However, in addition to generating reliable and robust data (or even insights!) on consumer attitudes, opinions and motivations, we could use our skills to provide clients with other significant benefits as well. Many of us do this at the moment, but these non-research benefits are usually seen as added value –the client is buying the research, not the added value. We argue here that qualitative researchers should be more explicit about promoting the other benefits that can be provided by the qualitative skill set. We can and should take these skills out of the box called “research” and create quite different kinds of activities within which to apply them. If we do this, we could move towards a new model of qualitative consultancy where research would be one among a much wider range of qualitative activities.

The structure of the paper is as follows:

- First, I outline a set of core qualitative skills and also some “research baggage” which we can shed;
- Secondly, I suggest four areas in which these skills could be deployed outside the traditional boundaries of research;
- And thirdly, I issue a challenge to qualitative researchers to be more assertive in promoting qualitative skills and thinking as well as qualitative research.

2 Qualitative skills

If we are to promote qualitative skills independently of research, we need to have a working definition of what these skills are. The dictionary tells us that “quality”

concerns “the nature, kind or character of things and people,” and qualitative skills are what we use in research to understand that quality.

In practical terms, core qualitative skills can be classified into three broad themes:

Group management skills, including the ability to:

- Manage human interactions and group dynamics to meet defined objectives;
- Develop stimulus materials to explain ideas or prompt responses;
- Sustain ‘committed independence’ – looking after the best interests of our clients whilst retaining independence.

Analysing and interpreting information, including the ability to:

- Interpret individual behaviour and attitudes in the light of broader cultural trends;
- Think and communicate using metaphors and analogies;
- Develop general models and theories of social processes from specific cases;
- Act as a translator between consumer and corporate cultures;
- Analyse and interpret the meaning of complex, varied and incomplete information.

Organisational skills, such as our ability to:

- Identify and recruit people from all walks of life;
- Stage ‘events’ in appropriate locations and contexts.

However, we also carry around a range “research baggage” – relevant to the conduct of more traditional forms of research but which weigh us down when developing new qualitative activities. This research baggage includes:

- The desire to remain objective and not allow personal opinion to creep into our recommendations;
- The passive stance of the moderator whose role is to reveal the consumer’s mind without influencing or changing it;
- The centrality of interviewing as a method of gaining information or insight;
- The desire to include “normal” consumers rather than unusual people;
- The need for our work to be seen as representative and reliable.

If we see our transferable skills as a set of tools, currently we use these tools to make the thing called “qualitative research” – usually, group discussions and individual interviews. The question we want to ask is, what else could we make with these skills and what other benefits could we provide for our clients?

3 Analysing clients

Clients usually want us to help them understand their customers better – but we can use the same skills to help them understand *themselves* better. Organisational consultants work within client companies, using ideas like systems theory (Senge 1990), or more recently complexity theory (Shaw 2002a, 2002b). For example, Shaw’s work on complexity suggests that rather than explaining behaviour in terms of cause and effect, we should focus on the patterns of social activity that give rise to desired outcomes. So, if a corporation wants its staff to engage in continuous professional development, it might not be helpful to have personal development plans and yearly reviews. Rather, the corporation should identify patterns of working, leading and managing that prompt people to develop their skills. Once these conditions are identified and promoted, the argument runs, the patterns of social interaction that emerge will produce the desired outcome without the need for traditional target setting and goals.

Thus, complexity and systems theorists look at social processes within organisations, and address questions such as:

- What corporate processes give rise to stress or conflict in the work place and how can these be avoided?
- How do innovative ideas arise within a company and what happens to them?
- What are the underlying conditions most likely to generate creativity in large corporations?
- What styles of leadership are most effective in these more fluid conditions?

Many of these questions would not daunt a skilled qualitative researcher. We have close relationships with clients and highly refined skills in observation and analysis - why not develop them further in this way?

We can also place what we discover about customers against a proper analysis of the client’s own culture and belief system. Using qualitative analytic skills, we can analyse corporate discourses – ways of thinking and talking that have real effects on

what is seen as true and untrue, or as possible and impossible, within organisations. These can be compared with parallel discourses within consumer cultures, asking questions such as:

- What unspoken assumptions are contained within the documents, memos, marketing strategies and reports of a particular organisation?
- How is the “consumer” positioned within this discourse – for example, as an active participant or a passive victim?
- How do these corporate discourses match with what we know of the consumer’s understanding of the market, category or product?

By performing this kind of cultural translation, we can point to corporate practices and ways of thinking that inhibit companies’ ability to understand people and meet their needs – without even talking to the consumer!

4 Generating new ideas

Qualitative research projects are often asked to come up with new ideas – products, brand propositions, or advertising concepts, for example. However, if the ultimate objective is to generate new ideas rather than understand the consumer, some market research conventions may actually get in the way. We do not need to speak to “normal consumers”, nor should we worry about biasing their responses or ensuring that “everyone has a say.” We don’t need to tape record, transcribe and analyse a three-hour workshop in order to identify the four good ideas that have emerged. If we can be explicit with clients that we are not doing research here, we can free ourselves from a wide range of irrelevant concerns and establish more important ones.

There is a wide literature on the conditions that are most conducive to creativity and the kinds of interactions that are most likely to produce innovation. Qualitative researchers possess many of the skills required, but creativity theory suggests that we need to deploy those skills in different ways:

- **Environments:** select locations, participants and formats that promote creative activity rather than calm discussion – why not a group of 30 people on a beach rather than eight in a viewing facility?
- **Participants:** normal consumers and homogeneous groups are unlikely to deliver new, innovative ideas. Rather, we should use our understanding of

group dynamics to deliberately create sparky, lively, even conflicting interactions, rather than to avoid them;

- **Facilitation:** the passive qualitative moderation style needs to be adapted to maximise creativity, injecting energy, excitement and direction into the group process;
- **Action rather than talk:** we need to move away from a discussion-based approach towards a task-based approach. We should develop materials to stimulate creative responses and set people tasks that encourage them to generate ideas through all the senses.

A good example of the successful use of these approaches is Nickelodeon's weekend workshops with 8 – 14 year olds (Wendt and Sonderegger 2002). Nickelodeon wanted to develop new programming ideas for children in the Swiss German market. They invited a cross section of 46 youngsters to a weekend workshop in a hotel, where they enacted role plays, made collages, put together their ideal evenings viewing and presented awards to their favourite programmes. Through using their qualitative skills in a different way, the researchers helped Nickelodeon come up with a much wider range of new ideas than they could have in a series of group discussions.

Another example comes from the work of Roy Langmaid and Mac Andrews (Langmaid and Andrews 2003) with larger groups – up to 1,000 in one case! Langmaid and Andrews believe that working with larger groups has a range of benefits for creating innovative solutions to tired old marketing problems. These include the range of ideas generated, the amount of activity rather than discussion which can take place, the fact smaller groups can work on separate parts of the project independently, and the buzz and excitement of being part of such a large enterprise. Clearly, facilitating these large groups requires sensitivity to group dynamics and individual needs, but the authors suggest that a different, stronger leadership style is required to make such sessions work.

The key point is this: If you approach idea generation like a market researcher you will probably fail - but your qualitative skills are still highly relevant to idea generation. Moreover, all our interpretative and analytical skills mean we are uniquely placed to take the ideas generated in such sessions and make them useable.

5 Predicting the future

Qualitative research has frequently been criticised as being of little value in predicting the future, especially over the longer term. We rely too much on static views of the market and conventional consumers who reject anything genuinely new. We fail to place our work in the context of social, cultural, technological and legislative changes and, as a result, we don't see the big picture. Everyone knows that we can't predict the future with certainty, but it seems that qualitative researchers won't even have a good guess!

Once again, this is because qualitative **research** was never designed to help predict the future, but rather to understand the past. Qualitative **skills**, on the other hand, are very well adapted to help organisations prepare and plan for the future – but only if we stop seeing ourselves as researchers. If we really want to help our clients in this arena, we should use our analytical and interpretative skills to:

- Understand our clients, their hopes, aspirations, fears, and plans;
- Identify signposts towards possible futures by being sensitive to cultural trends and the direction of social change;
- Identify the forces that affect our clients' market and consumers, the impact of those forces, and the likely consequences of this impact;
- Develop alternative scenarios for the future based on a wide range of sources, moving beyond a reliance on the consumer;
- Make suggestions to our clients about the relative likelihood of these different scenarios, and the actions they might take to influence them.

Ray Poynter's work (Poynter 2002) provides a range of practical tools for working in this way, including:

- "Themed reviews", where social and market trends are identified in order to explore how they might develop and shape the future;
- "The report in the future", where different client teams are asked to write a company report projecting five, ten and twenty years into the future;
- "Scenario planning", a structured approach to developing alternative future visions and testing their implications for social or corporate planning.

In the public sector, Visioning is a common approach to identifying how people would like their neighbourhood, housing estate or city to develop over a ten to twenty year time scale. Visioning is similar to scenario planning, but attempts to

reach a consensus on the desired future and then to identify the actions required to create it.

Here, the benefit to our clients would be credible and fully worked out visions of possible futures, as well as an understanding of how they can act to change those futures.

6 Engaging with the public

In the public sector in the United Kingdom, particularly among local authorities, qualitative research is frequently used as part of consultation processes with the public. This might concern issues such as housing needs, economic development, or neighbourhood regeneration. In these cases, although qualitative research is what is commissioned, the purpose of the project is rarely to generate data. Rather, the commissioning body wants to open up a dialogue, establish a longer-term relationship with the public, involve and engage them in the activities of the local authority. Ideally, this “empowerment” should extend beyond the individual project, leaving people feeling that they have taken part in an important process and are now better equipped to influence their local council.

This range of desired outcomes is a tall order for qualitative research, but qualitative skills can certainly be used creatively to help achieve these goals:

- We can help government officers and councillors learn how to listen empathetically to local people;
- We can encourage them to be open to alternative views of the world and not impose their own interpretations on people;
- We can advise on how to create conditions where local people feel confident to speak out and believe their views will be taken seriously;
- We can help develop materials to explain complex policy issues in straightforward language that people can understand.

A range of specific methods have been developed to address these needs, including Citizen’s Juries, Citizen’s Panels and Local Area Forums. Although these vary, they all share the following features:

- The groups are diverse rather than homogeneous to ensure that local people are exposed to different points of view;

- People are given sufficient time to consider their opinions, either by holding longer sessions or reconvening meetings;
- Participants are given information about the issue being discussed;
- Decision makers are accessible and are, in theory, accountable to those taking part;
- Feedback is provided to the participants on the outcomes of the consultation exercise.

These approaches require us to drop some of our more cherished “research baggage”, but have been demonstrated to deliver more valuable insights and outcomes to public sector service providers.

Clearly, not all research commissioners seek these challenges from qualitative research – indeed, some would rather avoid them. However, if it is clear that the client wants to engage and involve local people rather than conduct a one-off survey, then qualitative skills can be deployed to achieve this end. But only if we tell them we are not doing “research.”

7 Conclusion

This paper has outlined key skills possessed by qualitative researchers and has suggested a range of other contexts in which we could use them to help our clients. In doing so, we could provide different and more valuable benefits than mere data or insight – new ideas, visions of the future, better corporate practices and relationships with the public. The challenge to qualitative researchers is to break out of research box and deploy these valuable skills in a much wider corporate and social arena. As long as we remain qualitative researchers, these alternative services will always remain exactly that – alternatives to a well-established norm. Whether we have the confidence and ability to create a new model of qualitative practice is up to us.

8 References

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