

Best Practices for Moderating and Analyzing Interviews and Focus Groups

Author : lauren-shufran

Categories : [A Comprehensive Guide to Market Research](#)

Deciding which method of primary research is the best strategy for *your* market research question is big enough to be its own topic. In the last section, we offered recommendations for choosing [whether to conduct an in-depth interview or a focus group](#) (other primary research options include [surveys](#) and [observational research](#)). We focused on these two methodologies because they'll get you terrific *qualitative* data: details about your target market's needs, wants, and motivations; and the emotional forces behind their behaviors as consumers.

Of course, this is all essential information to have if your plan is (and it *should* be!) to give your prospects and customers more and more of what they want over time. And yet, you'll only have them in the room for anywhere between 30 minutes (in the case of shorter interviews) to 2 hours (in the case of longer focus groups).

So how do you make the *most* of that time? Well, if you're interviewing or facilitating the discussion *yourself*, here are our recommendations:

Set Clear Expectations for Your Participants

Of course, you'll have done this when you first invited them; but you'll put your participants at ease by ensuring that everyone (whether "everyone" is *two* people or *twelve*) is on the same page from the get-go. This means:

- **reminding them of the purpose of the interview or focus group.** What are the questions they're there to help you answer or the topics they're there to help you explore? Why is *this* topic so important to your business... and why might it ultimately be important to *them*? How will you implement their insights in your future business decisions?
- **reiterating how long the conversation will take.** Give your participants a timeframe... then stick to it! Remember that respondents are giving you the gift of their time. Respect it.
- **addressing terms of anonymity or confidentiality.** What level of anonymity or confidentiality can they expect in the session? Will you be recording? (Do you have their

consent to *do* so?) Who's the guy in the back taking notes, and what's *his* relationship to your business? Who will receive their comments, and how will their responses be analyzed? Do you intend to use their comments as quotes? (Do you have their permission to do so?)

- **setting ground rules and expectations.** This is particularly important for focus groups, as it'll help guide the discussion and ensure everyone feels (and *is*) heard. Rules may include things like: no side conversations, treat everyone's contributions with respect, only one person speaks at a time, and so on. You can come up with these as a collective in the beginning, or have them written and prepared for the session.
- **telling them how to follow up with you.** Participants may have further thoughts after the interview or focus group has ended. Don't deprive them of the option of giving you more data for your market research. What's more, questions or concerns might arise... and leaving the door open for continuing communication ensures participants know you care.
- **asking if they have questions before you begin.** A sense of certainty about the proceedings is a must for all parties. Give participants the opportunity to clarify any details before you all dive in together.

Plan a Coherent, Logical Order to the Discussion

Once you've given the overview and set the ground rules, it'll be time to dig in. If you're hosting a focus group, you might open with an ice-breaker to get participants comfortable with each other. This "group interaction" might involve breaking up into pairs. It might involve role-playing, word association, fantasy exercises ("If you had a magic wand and could change *one* thing about the purchasing process, what would it be?"), or whatever will both ease your participants into conversation *and* be insightful for your market research. Remember: There's no time to lose here.

Once the group has re-convened (*or* as you begin your one-on-one interview), move into easy, fact-based questions. These may be demographic questions. They may pertain to interests, job function, core responsibilities, challenges, goals... you know, the data that *isn't* logged into your [CRM](#). While these initial questions should be simple to *answer*, they should be in service of learning your target market in specific ways.

When it's time to shift into the core discussion, participants should be warmed up... and *you* should have a stronger sense of your target market than you had before you walked into the room.

You might have already planned the question you'll start with for the main discussion; or you might simply take the temperature of the room and go from there. If the conversation is flowing, and participants are engaging enthusiastically with each other, you could simply ask an open-ended question such as: "So you all know we're here to discuss [topic X]. What are your initial thoughts on

the matter?"

If *that* feels like throwing the door too wide open, and like it might stump participants, narrow it down a bit. Remember, you've asked your *fact-based* questions; now you're moving into *awareness, opinions, experience, and feelings*. What has their experience been with a particular product? What're their initial reactions to the television ad you just showed? (By the way, *this* is the time to introduce those kinds of stimuli.) What factors prompted them to leave their last service provider? As you'll note, the questions are starting to drill down here.

As the conversation progresses, you may want to move your participants toward "conclusions" about the topic. Notice the scare quotes there: These will be *tentative* conclusions, borne out by your analysis after the meeting has ended. The point here is to discover if participants feel strongly enough about a topic to take a stand: "So if you were to purchase this product, it would be non-negotiable that [x]?" Discern what your participants are absolutely clear about. If you're hosting a group, is there agreement across the board?

At the close of the interview or focus group, you'll summarize what you've heard in response to your questions: key themes, insights, conclusions drawn, and so on. This is a great time to open it up and ask if participants want to reflect upon the discussion, or whether there's more they want to say. Did you cover everything they *expected* you to cover? Collect feedback here.

The point is that there be a clear progression: from *background*, to *facts*, to *experiences and feelings*, until you've probed as deeply as possible into your topic and its key questions.

Take Care with Your Questions

We've discussed [best practices for market research survey questions](#) elsewhere, and many of those best practices apply. The *difference*, however, is when you're speaking with your target market face-to-face, you should ask *only open-ended questions*. Yes-or-no questions, ratings questions, and "select all that apply" questions have a place on a survey, but *not* in an interview or focus group: They don't give respondents time to explore or to answer at length.

Other question types to be careful with include:

Leading questions

These are questions whose wording infers that there's a "right" answer. "Would attentive users recognize that feature?" is a leading question; participants who want to be *perceived* as "attentive" will of course agree. When people are asked these kinds of questions, they're likely to respond the way they think they *ought* to, rather than how they really feel.

Assumptive questions

Assumptive questions are exactly what they sound like: They take for granted that something is a fact, when it might *not* be. This either forces participants to fit their answer to your presumption, or stumps them altogether. For example, "How frustrated were you when [x] happened?" assumes your interviewee *was* frustrated. On the other hand, "Tell me what your feelings were when [x] happened" will yield much more insightful responses.

"Why" questions

You may be surprised to see this question type on the list—shouldn't your target market be able to tell you *why* they made a particular purchase, or *why* they chose to leave your business, or *why* they had a negative response to your newest ad campaign?

It's useful to remember that you're interested in the *emotional* states of your target market—*not* their rational minds. The rational mind isn't always honest about why it does what it does: If you ask it why it bought *that* product, it might justify the purchase by talking about features, when the *reality* is that it was prompted by social status. [Bob Rutter of Customer Insights Research explains](#) it well: "*Why* puts people into a defensive posture, moving them away from thinking about their feelings and perceptions and being straightforward with you about that. They go right into their rational mind, and the rational mind needs to postulate an acceptable, rational, good-sounding justification for their behavior, their thought, or their perception."

Don't make your respondents think they have to rationalize anything. *You're* a consumer too; you know from firsthand experience that *reason* isn't how purchasing decisions get made. Stick with "What were your feelings about..." questions, and you'll get infinitely more insight out of your participants.

Steer clear of these three question types, and you're on your way to a great interview. Of course, your questions should *also* be posed in a friendly and conversational tone, be clearly worded (no jargon!), and free of vague or ambiguous language. As you formulate them, pose them to family members, friends, or colleagues as a "first pass" to see what kinds of answers you get, whether you stump anyone, or whether anything in the questions is easy to misinterpret.

Mirror Your Participants

We've mentioned adopting your participants' language—talking about your business or industry the way *they* talk about it—to put them at ease, and make them more likely to respond in detail and at length, as though you were an intimate. But "mirroring" extends beyond that.

For better or for worse, we humans tend to "like *best*" other humans with which we share the greatest number of commonalities. Studies have shown that [that includes common mannerisms, which induce prosocial behavior](#). In other words, if you can subtly (*not* creepily!) match the pace of their speech, the volume of their voice, their body orientation (leaning forward when *they* lean

forward), the position of their arms and legs, and their general energy level, they'll feel a greater affinity for you. And greater affinity = greater willingness to share.

Pay Attention to Paralanguage and Non-Verbal Cues

If you're practicing mirroring your participants, you're already paying attention to these things. They go beyond *what* the person is saying to consider *how* they're saying it. Paralanguage includes things like prosody (the speed of their speech), pitch, and volume (whether and when they're raising their voice). Other non-verbal cues include facial expressions, gestures, eye contact, blink rate, and more.

The capacity to observe these subtle messages (collectively called "meta-communication") takes time to develop. But it'll help you know when participants aren't being entirely honest; or when it's time to probe deeper; or when a participant is triggered despite the fact that they're "answering" your questions. Indeed, these things can sometimes tell you more about your participants than their words can.

Be Genuinely Interested

This one may seem obvious; but it's easy to get so caught up in the details of the moment (Is the recorder still recording? What's that quiet person at the end of the table thinking? Shoot, I forgot her name. She looks annoyed. Is it something I said?) that you forget *this is your target market*, and *you're* in the middle of a rare opportunity to connect with them.

So remember that you're here because you *are* interested... and then *show* them you are. This means using their first names as much as possible. As Dale Carnegie wrote in [How to Win Friends and Influence People](#): "Remember that a person's name is to that person the sweetest and most important sound in any language." It means practicing reflective listening, occasionally paraphrasing what participants say to show you want to thoroughly understand them. (Be careful, of course, of introducing bias in your paraphrasing.) It means encouraging responses through eye contact, head nodding, and so on. It means reminding them—*however* you can—that you're privileged to be in conversation with them.

That said, a good interviewer or moderator will know how to strike a balance between genuine interest and over-friendliness. Becoming *too* friendly with participants means running the risk that they'll tell you what they think you want to hear. (This is called "courtesy bias," and it's something you want to avoid.) Toe the line between comfort and formality, friendliness and professionalism.

Check Your Reactions

This is one way of saying *be aware of interviewer bias*. One of the best pieces of advice we've

heard is from [Michael Quinn Patton of Utilization-Focused Evaluation](#), who recommends that you act as though "you've heard it all before." Whether you're surprised, disturbed, or elated by a response, remain as neutral as possible. ("Neutral" means politely interested here.) Displaying emotional responses—whether through tone of voice or facial expression—might influence participants' subsequent answers.

This *also* means don't offer your own thoughts or opinions. It means don't "correct" participants or complete their sentences *for* them. Each of these things can make participants feel less confident in their contributions, and *more* likely to shut down.

Dig Deeper When the Time is Right

There will be times—*especially* if you've cultivated a permissive, encouraging environment and are posing the right questions—when participants say something that you want to hear more about. Here are some strategies for probing a little deeper:

- **Ask them to paint you a "feeling" picture.** Digging deep is especially important when it comes to the *emotional* experiences of your market. Participants won't have much difficulty giving you one-word answers about their feelings ("I was frustrated"). But what frustrates *one* person may not frustrate another. Follow-up questions like "Can you remember what you were thinking during that frustrating experience?" can be useful here. Or try: "Can you set the scene for me? I want to visualize where you were and what was happening in that moment." Remember, your participants don't experience your business in a vacuum. Knowing the whole picture will give great insights.
- **Invite them to give you specifics.** The word "specific" goes a long way. When participants offer feedback ("I thought the platform was easy to use"), insert the word in your follow-up question: "What, *specifically*, made the platform easy to use?" Affective experience (in this case, calm) is great to know... but you *also* want details about what *caused* that affective experience.
- **Employ the echo probe.** The echo probe works like the "uh-huh" probe and the "tell-me-more" probe. In all cases, you're encouraging your respondent to keep talking with a *very quick* verbal invitation of no more than a few words. You might employ these when you have a sense that your participant has more to say, but is concerned about over-sharing or is trying to be polite. What we like most about the echo probe is that it shows your interviewee that you've been listening closely ("Okay, so *then* you hit the reset button..."). By repeating the last few words your participant spoke (note this strategy works best when they're narrating an event or rehashing an experience), you're giving them permission to continue right where they left off.
- **Use silence to your advantage.** Silence is awkward for most of us, and people tend to

respond to it by filling it in with words. So embrace the art of the long pause—*especially* once your interviewee has finished answering a question. In other words, don't jump right into the next question. If they feel compelled to fill the silence, what they say next might be some of the most insightful, spur-of-the-moment information you can get.

Strive for Variety

You're focused on a single *topic*, sure... but that doesn't mean you can't come at it from an assortment of angles. "Variety" could be as simple as interspersing fact-based questions throughout the interview so participants don't experience the fatigue of too many thought-provoking questions in a row. It might mean *not* belaboring them with questions *only* about their values, but inserting a question about *sensory* experience in-between. Your range of questions can concern behaviors, opinions, knowledge, reflections, feelings, jogged memories ("What does it remind you of?"), or requests that they narrate an event for you.

If your interview or focus group involves a stimulus of some kind (a product demonstration, a website, marketing materials, a television ad), there'll already *be* some variety in the encounter. If *not*, you might consider *exercises* to keep the conversation dynamic. Role playing, sentence completion, word association, list-making, picture-drawing, card sorting, fill-in-the-blank exercises, personifying the product, fantasy creation, futuristic imagination... the list of possibilities is long. And *any* of these exercises will get you insights that you wouldn't necessarily get from an exclusively Q&A session.

Give Back

As a general rule, people enjoy talking about themselves and offering their opinions; but these inclinations won't necessarily be enough to bring them to the table. The incentives you offer will depend on your business and your budget; but they typically include things such as vouchers, discount coupons, or free products. Of course, cash is often the most compelling incentive... but if your hope is for participants to become loyal to your brand in this process, a product-based incentive will ultimately do you better.

Compensation should reflect the length of time participants give over to you. And if you're running a focus group, we'd *highly* recommend refreshments and snacks—if not a full meal.

Analyzing Your Interview or Focus Group

Both interviews and focus groups are best analyzed immediately after they're over—and naturally so. The conversation will be fresh in the minds of your moderator, your note-taker, and any other observers who were in the room for the experience. Your meta-analysis should include these things, all of which should go into the report of your overall findings:

- participant characteristics (these will be especially useful for your market personas)
- the general mood of the discussion, participants' body language, and their levels of enthusiasm and participation
- participants' consistency (Did their comments align with their behaviors? Did they reverse their positions or change their opinions over the course of the conversation?)
- common themes or trends introduced in response to your questions (cluster these concepts together to get a better sense of the "big ideas"). Did you notice different themes among participants with common characteristics?
- words or phrases that came up consistently throughout the conversation (consider frequency counts when you listen to the audio or watch the video later; these will be useful for your SEO and future marketing)
- surprising or unanticipated comments
- "light bulb" moments and interesting quotes
- the context of any responses in which participants appeared triggered or their response was particularly intense (because obviously, this topic really *mattered* to them)

... and *anything else* that seems worth writing down. (If you're questioning whether it's worthy of being recorded, *it's worthy of being recorded!*) If you held more than one focus group, for instance, *now* would be the time to compare and contrast.

Pro Tip: When analyzing responses, give more weight to answers that were specific and based on personal experience than you do to those that were vague, impersonal, or hypothetical. Personal experience should always speak most strongly.

Finally, we'd suggest the analyzers take a day or two to let the whole experience sink in before reconvening to write a final report. You *may* have new realizations as you turn the day over in your head... and it'll be easier to see the big ideas that may have gotten lost in the detail during the initial analysis. When you *do* reconvene, replay the audio or video to see what other final insights you can catch.

And *then*? It's action time...

So far, we've discussed three important forms of primary research: market research surveys, in-depth interviews, and focus groups. In the next section, we'll dive into [one final method of primary market research: observational research](#). Learn what it is, what methods it entails... and why it's worth it for your business.