

Using Qualitative Research to Understand Your Life Science Customer

This transcript was lightly edited for clarity.

**Chris**: Today I'm speaking with Ilana Drucker. Ilana is the president and founder of Scorpio Research, a strategy firm that specializes in qualitative research. Ilana, welcome to Life Science Marketing Radio.

**Ilana**: Thanks so much, Chris, and thank you very much for inviting me to be part.

**Chris**: I'm excited about this one. I think it's going to be great because, of course, I know a little bit about qualitative research but never talked to anyone whose sole focus was this kind of research and I'm anxious to hear how it's done. First of all, what is the goal? What types of information or insights are companies looking for when they come to someone like you?

**Ilana**: Yeah, it's a really important question, Chris. I just want to back it up for a moment and define what is qualitative research and differentiate it from quantitative, if that's okay.

**Chris**: Absolutely.

**Ilana**: Great. Qualitative research is really a form of applied research. In this case we are applying it to the marketplace and to life science in specific, which is an area in which we specialize. Unlike quantitative research, which is based on numbers, it's structured and it's generally fixed in terms of the responses, qualitative research is exploratory. It's subjective in nature, it's either unstructured or semi-structured, and it seeks holistic understanding. So quantitative research is more about how many, how much, with the close ended or a fixed response, and qualitative is really geared toward answering underlying hows and whys that might stand behind numbers.

So, qualitative research, a little bit of context from our perspective at Scorpio, is that it's both an art as well as a science. So qualitative research is rooted in the social science, thereby making it a scientific endeavor, with its roots in psychology and anthropology and sociology. Most moderators are going to come from a social science background. Part of the science is to analyze what are subjective insights or data in order to identify patterns, trends, things that would be meaningful to clients and then interpret and deliver upon their meaning. I feel like that's the scientific piece of qualitative research and then there's an art as well.

I don't know that people often think about research as having an artistic component but it really does. A successful moderator is going to be an artist in terms of creating rapport for the audience, whoever the audience. And in the world of life science we are talking about patients, providers, payers, pharmacists, so they all seem to be alliteration in P, I'm not sure why. To create that rapport where people feel as though they can connect, and these are people who may otherwise never have an opportunity to meet or share divergent points of view. The art is really to create a safe space where they feel like they can trust you as a moderator, wherever that space, online or in person, and trust each other and then share.

There is ideally the art of interpersonal relation skill being applied to the research environment, asking the most effective questions to solicit really rich responses and knowing, Chris, how and when to probe for deeper insights. And all the while the successful moderator is balancing and juggling what are the research objectives, is there rapport that's being built and established with engaging in interesting conversations. So that was just a little bit of context regarding qualitative research and what differentiates it from quantitative. The data doesn't stand in a vacuum. It rather requires understanding really the whys and drivers behind what people do and for what reasons.

**Chris**: I like that. It's you get the numbers from the quantitative side but you really do want to understand why a significant fraction of people might think in a certain way and, as you said, what are those patterns and what motivates people. Because really from a marketing perspective, understanding people's motivations is huge not only in what you build but in how you communicate it, right?

**Ilana**: Absolutely, yeah. I mean, without the context and without understanding where people are coming from in the decision-making, a number really is just a number. You don't necessarily have the ability to have any context around that number, any narrative, any explanation, any motivation. And one other thing, Chris, that's interesting, and I learned this when I first entered this field, it's an acronym that I found really helpful. When thinking about qualitative research, think about POBAs, and it's not some kind of fraternal organization or anything like that. It's actually an acronym for when you're thinking about people's relationship and you're trying to gain insight about a product, a service, interactive media, some kind of app. Whatever it is that you might be testing, you want ideally to get to the POBAs.

The heart of qualitative research is getting to the perceptions that your research audience is going to have about the research topic. The O represent their opinions, the B are beliefs, and then the A are the attitudes. And if your listening audience can come away really focused on this acronym, that's the goal of qualitative research, is to get to the POBAs about whatever it is you're trying to research and understand.

**Chris**: It seems like, without the qualitative research, you might draw the wrong conclusions from your quantitative research, is that true? Is that one of the benefits?

**Ilana**: Certainly. I mean, a lot of people choose...and there are occasions where doing quantitative alone is very appropriate. A lot of clients will start with qualitative research to generate hypotheses that are then tested in a quantitative survey, for example. And when you have a quantitative survey and a representative sample in terms of numbers, you can generalize findings to that particular research audience or population.

Often we will do a survey, look at the numbers, and then want to understand the whys and the hows behind it. So we can look at the findings from the survey and then conduct qualitative research to really get to those POBAs and understand why people have said, you know, "Yes, I would be interested in buying that product," or, "I choose this particular price range for this subscription service," for example. So doing it in and of itself, quantitative research oftentimes has very, very useful applications. But if you are looking for the motivations and the hows and the whys, you're not going to get that from quantitative alone.

**Chris**: Okay, got it. And so it sounds like you could do qualitative before or after quantitative, depending on your process, whatever you're trying to get at.

Ilana: Exactly. I think that different research objectives will dictate whether it makes more sense to do the quantitative survey before or after. A lot of clients are putting together myriad methodologies and doing hybrids of qualitative-quantitative and then, you know, several methodologies even within a qualitative on a particular study.

**Chris**: Okay. You mentioned before online and in person, I guess, those are two of the different ways. Are there other ways to gather qualitative data?

**Ilana**: So, probably the most familiar is focus groups. Focus groups can be done along with all of these other methodologies that I will just quickly list: online, in person, on the phone, or a combination thereof. So you have focus groups and then you have what's known as in-depth interviews, and those can be done one-on-one, with two, three people. There are ethnographies, and those are done in the natural environment, where a product or a service is being consumed or a particular behavior is being conducted.

There is also usability testing or user experience sessions, and then there are all different types of methodologies that have been emerging in recent years that are specific to the online world. The two main things you need to know about that are these methods can be either synchronous, that is real-time, or asynchronous, non-real time. There are many different forms of gathering online qualitative research that are really leveraging the advantages of technology, especially mobile devices.

**Chris**: Nice. Just for my knowledge, and I'm sure some other folks, when you say ethnography, what does that mean exactly?

Ilana: Basically an ethnography is an interview, a qualitative session that happens in the environment where the research topic is most relevant. So, for example, we were interested in observing the workflow of some bench scientists who were working at a central laboratory in order to make that process, to optimize it in terms of efficiency and interaction with a particular online system. So we went there and we were able to observe them real time, and an ethnography is a particularly effective means of identifying pain points and unmet needs, which can then lead your clients to think about different ways to improve upon or innovate on existing products and services.

**Chris**: Got it, yeah. So now I have a much clearer picture. It's an anthropological study, for example, of how somebody does their work.

**Ilana**: Exactly, or how somebody consumes a particular product or a service or interacts with a new app in an environment where they might be, you know, interacting with that particular...that app. So it is definitely anthropologic. You know, it has its roots in anthropology and, yeah, it's just a great way to see people in a natural environment.

**Chris**: Okay. So you had mentioned focus groups before in a context of 50 people, and I know we're not talking now about a 50-person focus group but probably more on the order of 6 to 8 or 10 people maybe. Given that that's such a small sample size, how do researchers make sure that the participants they have cover, maybe the broad set of POBAs that you are looking for or are relevant to the research answers you're trying to get?

**Ilana**: Yeah, it's a really important question, Chris. The starting point for this is a document that we use in our industry called a screener. A screener is a set of questions that determines whether or not that particular person is going to be the right person with whom to speak on the study. It can consist of all different kinds of questions, behavioral, attitudinal, demographics, to make sure that you're getting the right mix. Quite frankly, who you need to get really depends upon the research objective, but the different ways to do it are your market research vendor or the company, the strategy firm that you are hiring to help you with your study should have in-house recruiting.

A lot of times we'll have our own databases of people who may be relevant from which to pool, and then we will have a field manager designated to put that screener into action and to start recruiting for participation. A lot of times, depending on the audience, you can also commission a recruiting company. I would just say, so you have the screener, you have your own in-house field manager, then there are also professional recruiting companies that the firms like us will hire as part of the overall project if we lack the in-house capabilities or expertise for that particular recruiting need.

And I guess, I would just add, Chris, that it's important to think about the representation that you're getting if you were doing, for example, a focus group. A typical focus group these days is 6 to 8, some companies are opting to do mini groups of 4 to 6, some, you know, maybe going up to 12, although less so these days. So it's important to think about getting a really nice mix, knowing that you have a specific audience need in mind within that. If it's, for example, a business-to-business study, think about getting different kinds of companies or different sizes of companies in there. It's really important to think about the sample and to be pretty vigilant in monitoring that because you want to maximize the insights that you're gathering on the study because that's money that's being spent. So the people who are being recruited need to be the exact right people, and a really good vendor is going to take care of that for your client.

**Chris**: Yeah, that's nice to know, that the burden isn't on your client, for example, to pick the people that are gonna participate in the study and that there are actually experts like yourself or recruiting companies who have massive databases to pull from to get that relevant and diverse set of opinions.

**Ilana**: Absolutely. And in almost every study in which I've been involved, that recruiting piece is handled by us, by the vendor, not by the client. Do know that the client can provide the vendor with internal lists of audience or contacts who may be appropriate for that study, and then, again, the onus is upon the vendor to make sure that they are getting that right mix and that right sample. Because qualitative research provides directional feedback, it's not generalizable to that entire research audience or universe at large like quantitative research would be.

**Chris**: Right, makes total sense. So let's talk about what the process of a focus group looks like. Ilana, are you trying to start a discussion and just to have the people in the group, you know, talk amongst themselves or get answers directly from individuals. Is it a little bit a both? What does it look like if we're conducting a focus group?

**Ilana**: I do think that it's a little bit of both. So, in addition to a screener, these may be new terms for the listening audience. The screener is the document that is used as a questionnaire for recruiting the appropriate, relevant, and a well mix of respondents to participate in the research. The discussion or moderator's guide, if it's well-crafted, Chris, is going to yield exacting answers. So, good qualitative research is going to create a dynamic discussion and exchange of ideas with you as the moderator at the helm, managing the time, ascertaining that the research objectives are being met, and all the while again making certain that you've got that art of moderating down in terms of engaging your respondents and urging them to go deeper about the topic of focus and maybe bringing them to new places of discovery.

So if it looks like a serial Q&A, "What's your favorite thing about this? What do you like? What don't you like?" If it sounds like that, that is a non-effective focus group and probably a moderator who you shouldn't hire again. The best compliment that I ever received as a moderator is a client who came to me and said, "You know, it felt just like we were sitting around a dinner table and having a conversation with these industry experts, and it felt..." So you want to make certain that you are bringing your humanity in and having a conversation. The guide that you've created in advance, that's often approved and sometimes even created in collaboration with your client, is going to have everything that you want to cover, but it is just a guide.

So I tell people to eat the guide, right? And in moderating you want to eat the guide and then let's say, nicely, you want to regurgitate it and to simulate it in such a way that the questions and the content, it's known, and then you're able to have a conversation about it. At the same time you're dealing with a group dynamic, for example, in a focus group. So there could be a dominant person or an evangelical person or a very timid person. An effective moderator is somebody who has assimilated that guide and all of the content and the questions and the probes that need to be asked, thinks well on their feet, is flexible to go in different directions, and yet keep everybody on track.

Try to solicit information and insights and comments from those who are less talkative and perhaps manage those who are dominating the conversation. So, the answer to your question is it is a bit of both. Your discussion guide is going to have the content and the questions, and as you're moderating the discussion you're ideally going to create a rich dynamic discussion and exchange of ideas that may take you to even new places not on the guide but yet still relevant.

**Chris**: Yeah, that's neat. I like the sitting around the dinner table kind of, maybe the thanksgiving dinner table where it gets turned up a little bit.

**Ilana**: It's nice to turn it up. I mean, think when you get people representing different... If it's a business-to-business study, different companies, or patients coming from different life experiences, or whoever the research audience, having the different points of view is what makes it so engaging and what makes it so interesting and exchanging ideas. Because somebody may hear something from another person and then, "Oh, wow, that just sparked a new idea in me," or, "You know what? I challenge you." That's where the richness lies, is having the conversation go deep while the moderator is managing the time and managing the research objectives.

**Chris**: Nice, yeah, that's cool. Can you give me an example of a use case for qualitative research that people should be considering even though they typically don't? I mean, I don't know. Some companies might do this frequently, some companies may have never done it all, and some companies, I guess, I'm thinking about a situation where a company goes, "I didn't know I could find out the answer to that question," or something like that.

**Ilana**: I think that your question was more about also, Chris, maybe usages outside of what might be the marketing and sales aspect but still relevant, to your listening audience in terms of running effective companies. I would say that the skills of a qualitative researcher, a moderator, the one that's tapped into the artistry of it, along with the training and the skills and meeting of the research objectives, is using the skills internally. There are a couple of examples that I wanted to enumerate here. So if you can use qualitative insights and skills to interact with customers on a regular basis, finding out and gaining feedback about whatever it may be, operations, HR, assays, ways to more efficiently run the company or improve on products, that's a wonderful skill.

And that sometimes requires training of people to get qualitative insight out of their customers regularly, gauging satisfaction, gauging experience. Many, many companies these days are using qualitative research and employing online communities or panels, and these are people who are often prepaid consumers or stakeholders, thought leaders, to share their opinions on a regular basis. They may be incentivized or paid, as I said, financially and those are wonderful opportunities to use qualitative research and skills with people on an ongoing basis. That way you're getting regular feedback. So it's an application of qualitative research that a lot of companies, we found, especially in the life science industry, don't implement, and it's a missed opportunity.

**Chris**: I love it. So you've recruited people who say, "I'm willing to give you feedback on an ongoing basis. You're gonna compensate me in some way but I want to sign up for your community and then you can tap into my opinions over time"?

**Ilana**: Exactly right. And it's almost proving to be game changers for many companies in terms of the feedback that they're garnering from these communities. Retention is pretty high, but once there's drop-off you can bring in new people. You can even get subsets of the community and address particular studies or research needs to that particular group within. So yeah, it's a great application of qualitative research, Chris. Most often these communities are online panels, they call them MROCs, market research online communities, or expert panels.

Most typically it's online, but people also will bring them in. We just did something with a large media company. They'll bring them right into the company, sit them down, and have an internal focus group with these customers or opinion makers. So, yes, it's been a really helpful application of the same qualitative research skills.

**Chris**: Fantastic. So now, tell me once the research is done, what do the deliverables look like? What do I get back? I've hired someone like you, we've done the research, what am I looking at to make my decisions on?

**Ilana**: Yeah, it's great. There are actual artifacts that you can receive as the results of the research, and in almost every case there is a recording. Obviously you need to tell the respondent that you're being recorded, it's an ethical requirement in our industry. And if you are able to capture video I think that's wonderful because a picture is worth a thousand words and if you're able to put together maybe a quick highlight of some of the findings, one of the artifacts or deliverables can be just the video itself, or our companies and companies like us can put together a highlights video.

The primary deliverable, in addition to the audio or video recordings or anything that's done before in the form of homework or during the research itself, Chris, from the research company, you will get a report. That report can be an executive summary or a top line report, and these things are all decided in advance as part of the budget. You could get a comprehensive PowerPoint report with verbatims, which are direct quotes taken from the research. And then often times there are presentations, those are over the phone, those are in person, of the research findings.

A lot of times we follow that up with, "Okay, so now what? Yeah, we have the research, we have the data, we have your report, it's great, can you help us?" Sometimes we'll then go in and almost do like a workshop with the stakeholders and give them tools, what we call different projective techniques, about what to do next. There are myriad examples of creative ideas, storyboarding, taking the findings, and then implementing them, putting them into next steps and the like. So those are the deliverables that you can receive. There's also... A lot of times people will ask for the raw data that's sometimes recorded and just to be anything from an Excel spreadsheet to these really sophisticated analytical tools. But the primary deliverable would be a report, either an executive summary or a full report in Word or PowerPoint, and then followed up by a presentation and maybe some workshopping as well.

**Chris**: Right. The workshopping part or the what next part is the most surprising part of that answer to me because I didn't even think about that, honestly. I thought it would be up to my company to draw the conclusions from the data that you provide me, but obviously there is value in having someone who's seen people produce answers to explain kind of how you can use those going forward.

**Ilana**: Yeah, you know, I think what is effective about that is, yes, of course, the research company has been in the field and they've conducted it and they've seen it, but imagine different stakeholders, different departmental interests in the meeting and having a facilitator come in. It doesn't even have to be necessarily about that particular qualitative research. It could be any kind of internal meeting. It's about helping to formulate the best questions and have people empathize with the other department's needs, priorities, points of view, and helping them as a team get to the next steps and hear the answers and listen and make sure that the different points of view are being heard and respected, and then using some of the same skills as a qualitative researcher and a moderator to help them in those debrief or workshopping scenarios.

**Chris**: I love it. All right, so let's finish up with this. What should companies be thinking about if they're considering looking for someone to help them with qualitative research?

**Ilana**: Yes, so I would certainly ask questions of companies... What's typical in our industry is to solicit three proposals. Not everyone does that. People have their preferred vendors and they will just reach back out to them when a research need avails or when it presents. Sometimes it's up actually to the research company to reach back out and follow up. Because a lot of times we do the research and then there isn't that bench-marking or the followup, "So what was the experience like now?" The questions that I would ask of the firms would be, "What is your experience in this particular space or on this particular subject?" If it is a disease state, for example, or working in drug development.

I would tell your audience to ask them about what are their methods for recruiting to ascertain that they are getting the right people. Do they maintain internal databases or do they outsource the recruiting to a larger recruiting company? What is the training and experience of the people who are going to be moderating? Could they supply some blinded sample reports and ideally also some blinded projects, case studies that are similar in scope and in approach and ideally even content to the research that they're seeking to conduct?

**Chris**: Excellent. That all makes great sense and, again, things that you might not have thought of unless you do this regularly. So, Ilana Drucker, this has been really informative. I've learned a lot, I know the audience has learned a lot. Hopefully it will make them think a little bit more about how they can use qualitative research and what they need to do to get usable answers, things that are true and will make a difference for whatever they're trying to accomplish. Where should people go to find out more about you?

**Ilana**: Thank you for asking. I have a LinkedIn profile, [Ilana Drucker](https://www.linkedin.com/in/ilana-drucker), and you're also welcome to visit our website. It's <http://www.scorpioresearch.com>.

**Chris**: Excellent. As always I will put those links both to your LinkedIn profile and Scorpio Research in the show notes so people can find them there easily. Ilana Drucker, thank you so much for talking to me today.

**Ilana**: Thank you so much, Chris. I enjoyed it and I hope it proves helpful indeed.

**Chris**: Definitely.

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