



A “Baker’s Dozen” of Tips for Online Moderators

Since 2014, we have provided useful tips to those who sign up to receive informational emails from the Online Moderator Training Institute. Each tip provides practical advice for new online moderators, and refreshing reminders for experienced online moderators. Here is a sampling of 13 of the tips that have been sent to date. Enjoy.

Tip #5: Mix it Up

This tip applies to offline (in-person) groups as well as to real-time online chats. It serves as a good reminder of a best practice in all qualitative data-gathering settings. The idea is to make things enjoyable for participants with a variety of question types. The more they enjoy the experience, the more productive your online chat session will be.

- Take a Poll. If the platform you are using has a polling feature, take advantage of it. In an online chat, polls are useful for getting respondents to commit to an answer without being influenced by others. It's the same as having respondents write down their answers before sharing and discussing them in in-person groups. (Of course, use polls as a conversation starter - NOT as a quantitative test.)
- Vary Your Verbiage. Make your questions as conversational as possible. Change your question stems. You could ask these three questions in a row: "What do you think about X? ... What do you think about Y? ... What do you think about Z?" But doesn't it come across a little more warmly the following way: "What do you think about X? ... Let's turn our attention now to Y. What are your thoughts about it? ... And finally, how does Z compare to the first two?"
- Elicit Different Response Lengths. Respondents are spending a lot of time on the keyboard while they're participating. They appreciate little breaks. You can do this by tossing in an easy yes/no or other very short answer type of question. It gives them time to rest their fingers, and makes them more motivated to spend a bit more time on questions that require longer responses.
- Show Things. Give your respondents some visual relief on their screen. Use the whiteboard to show keywords that help them focus on a new part of the discussion. Perhaps show an image that's related to the current topic. If you're doing a concept test, show the concept in the whiteboard.
- Use Interventions. Projective exercises allow respondent to get out of their own skin. Showing a set of ambiguous images in the whiteboard and having them pick one that fits their feeling about an issue/brand/idea/etc. is a nice diversion. Show them a list of words and have them pick the ones that they most relate to on a particular issue.

Those are just some of the ways that you can keep things fresh for your respondents and help get the most out of online chats.

TIP #10: Names Matter

Whether you are moderating an online chat, a message board, or are doing mobile qualitative research, be sure to call respondents by their name. This personalizes the experience, and helps overcome the "distance" between you and your respondents. Calling somebody by name is the equivalent of looking them in the eye in an in-person exchange. When you want to call the group's attention to a comment made by a participant, mention the name of the participant who made the comment - it serves as a shout-out to that individual (pat on the back) and helps others begin to remember who's who in the group. The simple act of using their name makes them feel that they are being keenly listened to, which makes them more comfortable and can only help the data collection process.

Tip #14: Exercise “Crowd Control” in Video Chats

One of the few challenges in video chats is getting participants to speak one at a time. If two or more talk at the same time, they "cancel each other out," rendering all speakers virtually unintelligible. Some video chat platforms have a "button" respondents can click to indicate that they'd like to speak. The moderator can then call on them when other speakers have finished.

There's also an old-school method for preventing participants from talking over one another in a video chat: have participants literally raise their hands when they want to speak. This way, it's not only the moderator who sees who'd like to speak, but the other participants as well. A lot of hands in the air is an indicator that this is a topic that many are engaged in and would like to comment about.

The moderator wants every comment captured for later analysis. Through these simple techniques, the conversation can be controlled in a way to assure that everyone is heard.

Tip #30: Be Sure Moderators Get a Break

It's fairly typical to have in-person focus groups scheduled at 6 and 8 pm. The moderator often has a very full guide and is lucky to adjourn the 6 pm group by 7:50 or 7:55. That gives the moderator a bit of time to check-in with the back room team, perhaps take a bathroom break, and begin the next group. Not a problem.

With online chats, however, the moderator should take more than just a 5-10 minute break between groups. Fingers need a break from hovering constantly over the keyboard. Eyes need a break from focusing intensely at a computer monitor. And the brain needs to be put on pause for a while. Add to that the time needed to debrief with Observers, as well as the time needed for a body break, and it should be clear that 5-10 minutes doesn't cut it.

Schedule a 30 minute break between the conclusion of the first chat and the beginning of the next one. Mind you, the moderator won't get a full 30 minute break. The debrief meeting with the back room will take time. Any changes to the guide will take time. A good online moderator will also mingle with the respondents in the virtual Waiting Room before the next group begins, which again takes away from the moderator's break time. But a 10-15 minute break during that 30-minute "lull" will help the online moderator feel refreshed and ready to continue doing good work.

Tip #36: Harness the Power of Reminder Calls

Brick-and-mortar facilities use telephone reminder calls as a tool to maximize the show rate for in-person focus groups and IDIs. When a recruit makes a verbal promise to another person over the phone that they will show for the interview or group, his/her likelihood of actually showing up increases markedly.

We live in a web-based world where a lot of communications take place by text and email. With that in mind, it would seem that recruits for online focus groups (who are often recruited via online surveys) don't need a telephone reminder call. But based on experience, this is not the case. Online panel companies that do not include telephone reminders in the recruitment process frequently need to recruit 3-4 times the number of people needed to fill a group. This approach is risky. What if we recruit 24 for 8 to show, and 16 show up? The expense of the incentives paid for those who show but are not used can be quite high.

When the online recruitment process includes a telephone reminder call, we seldom need to over-recruit more than we would for in-person groups. When an online focus group recruit (who was recruited online) gets a phone call asking them to confirm their participation, the recruit feels "special" that someone has taken the time and effort to reach out to them; hearing another human's voice (even if it's via voice message) asking them to verify their interest in participating solidifies their commitment to the project.

So, when getting proposals for recruitment of online projects, be sure to ask if phone reminder calls are included. In our experience, the extra cost is worth it.

Tip #39: Be Human

Almost by definition, text-based chats and message boards lack the "human touch" of in-person (or even online video) discussions. It's up to the online moderator to create a more down-to-earth environment. The extent to which a moderator succeeds in creating a comfortable atmosphere can make the difference between an OK session and a better one that is more engaging for participants and productive.

There are *many* ways to "humanize" these sessions. Here are some examples:

- The moderator might choose to post a picture of himself/herself at the beginning of the session.
- After respondents introduce themselves, the moderator can tell a bit about himself/herself so that participants have a better impression of who he/she is.
- Add "bridges" to transition from one question to another. ("You just told me what you like about this idea. Now, let's 'flip the coin' so to speak. What do you dislike about this idea?")
- Occasionally summarize what was heard before moving on. ("What you - as a group - seem to be saying is X and Y. Am I reading your group correctly?")
- Give thanks frequently. Don't wait to thank participants till the end of a session. As appropriate, give participants a virtual pat on the back to keep them motivated. ("Good work everyone. Thanks. Now I'm going to switch gears.")
- The moderator should allow his/her speaking style to come across in online chats and boards. One way to discover one's style is to take the transcript from one or more of your in-person groups, extract only the moderator comments, and strip away the actual question that's already the guide. What's left is how the moderator typically ad libs in-person. Look for patterns, make note of them, and interject them into online guides.

The more the moderator comes across as a person rather than a robot pushing questions out to respondents, the more engaged participants are likely to be.

Tip #62: How to Get Uninfluenced Responses in Video Chats

Most video chat platforms have the option of adding a “pod” in which participants – even though we can see and hear them – can type responses into a text chat area. (This is often good for sharing comments while others are speaking.) However, we are not aware of any platforms that prevent these text responses from NOT seen by participants until they post their own response. Thus, these text chat pods cannot be used to collect uninfluenced responses in a video chat. Based on the platforms we have seen, video chat platforms are not designed to accommodate this need.

But all is not lost. We can use an old-school technique to get uninfluenced responses from participants in an online video chat. Here’s one way to make it work.

1. Prepare. Be sure to let participants know beforehand that they should have a large pad of paper and a dark pen or pencil on hand (a dark Sharpie is even better). Furthermore, remind participants of this as they show up for the session.
2. Instruct. At the appropriate point, tell them that you are going to ask a question (or a short set of questions) that you would like them to write down their answer(s) to before discussing. Emphasize that there is to be no talking, and explain that you are doing this purposely to get their independent answers. (You may also say, “I want to see how similar or different everyone’s responses are.”)
3. Ask. Ideally, their responses will not require too much writing, so that the writing part of the exercise does not take too long. Short responses are also good because it allows them to write big, enabling everyone to read their response(s). An example of a short question set would be: “After seeing the new idea, please write down your answers to three questions on your sheet. First, tell me how interested you are in purchasing it using a 1-5 scale. Second, give me a word or a short phrase telling me ONE thing you like about the idea. Third, give me a word or short phrase of ONE thing you dislike about the idea.” Short and sweet.
4. Reveal. When everyone has finished writing their answers, ask them to all at the same time hold their sheet of paper to their webcam for everyone to see. You might also have them read their answers aloud.
5. Capture. Jot down their responses data as quickly as possible, for reference during the ensuing discussion. Perhaps take a screen shot.
6. Discuss. Debrief with the group about their responses.

This is a fun exercise – it’s like what’s done on some vintage TV game shows, and everybody gets to participate in the “big reveal.” In the process, you’ve captured truly independent answers to some key questions in the discussion, and you’ve turned a software deficiency into an opportunity creatively achieve your information objectives.

Tip #63: Watch Your Language!

It's unfortunately that, in the online qualitative research field, there is no universally accepted language for the different research options that are available. To avoid misunderstanding and confusion, it's important to be very clear to others when we talk about particular options. Here are some examples.

- To some, *online focus group* is a generic term that encompasses all forms of online qualitative. But some use this term only when referring to real-time sessions – NOT multi-day message boards.
- A *chat* typically refers to any type of live (real-time) discussion. But for some, the term may apply only to real-time text chats, or only to video chats.
- When someone mentions *message boards*, others may ask, "Do you mean bulletin boards?" Both terms are typically interchangeable, but not everybody is certain of this.
- The term *communities* typically refers to longer term boards (weeks if not months or longer in length) and also typically includes more participants. That said, who's to say that a three-day message board discussion with 12-16 active participants doesn't create a sense of community among those participants? Can't a very productive 3-day discussion foster a sense of community for participants?

So, when communicating for the first time with someone about various online qualitative research options, always be precise about what you mean. And when others use any of the above terms, seek clarification about what they mean.

Tip #75: Sell Online by Proposing a Side-by-Side Design

Qualitative research buyers are often reticent to try a qualitative approach that – *to them* – isn't tried-and-true. Thus, if they've never done any online projects, online options are seldom considered. They may be curious about online methods, but they need "proof" of the efficacy of online methods before they'll consider trying them.

Unfortunately, there's little to no "proof" in the literature about the efficacy of online vs. offline (in-person) groups. Those of us who do a lot of online work can share anecdotes about the power of online qualitative, but research results are almost always proprietary, so the documented "proof" that skeptical buyers are looking for is hard to come by.

One way around this is to propose a research design that incorporates BOTH online and offline methods. When we have done this in the past, we propose doing the in-person groups first, followed by an online group or two. This dual-method approach serves multiple purposes:

- Comfort. It makes buyers comfortable that the methodology they have faith in is an integral part of the design.
- Reduced Perceived Risk. It minimizes their sense of "risk" in the very unlikely circumstance that the online sessions go awry.
- "Proof". It gives them (and you, the researcher) a rare opportunity to do some side-by-side research on results from the two methods. ("Do we reach the same conclusions with both methods?") Of course, there may be some subtle differences between the online and offline results – but no more than the differences we typically witness as we go from one in-person group to another.
- Maximize Success. By doing the in-person groups first, we learn what works and doesn't work in the guide, allowing us to tweak the online guide and thereby maximizing the success of the online group(s).

The upshot of this is that you become a hero for successfully getting your client to try out something new, and they become heroes in their organizations for stretching their research budget by adopting a more cost-effective qualitative research method. It's a win-win for everybody.

TIP #81: Shape Board Participation Behavior on Day 1

Most message board respondents are well-meaning individuals who want to provide useful data and properly earn whatever incentive they have been promised. But, like most of us, they don't want to put in more effort than is necessary.

Some message board participants aren't as diligent as others. They may give too-brief responses, overlook parts of questions, fail to respond to follow-up questions, don't engage with other participants, and in rare occasions may even copy other's posts. It's up to the moderator to spot these "bad behaviors" and take corrective action; doing so early and swiftly in the process gives participants the feedback they need to give the research team what it needs.

If the moderator doesn't take corrective action early enough, bad behaviors are likely to persist. And if otherwise compliant participants see others getting away with doing less, we run the risk of those bad behaviors spreading throughout the group – which of course threatens the value of the research.

There are two key things that online moderators can do on the first day of message boards to help cultivate good participant behaviors:

- Ask for missing information as soon as it is spotted (e.g., "Susan, it looks like you overlooked Part C of this question").
- Ask for clarification of ambiguous parts of posts (e.g., "Jacob, the last statement of your post isn't clear. Please help me understand.")

This type of feedback should be posted publicly, so that even those who are fully compliant can see that you (the moderator) are serious about needing full responses that are clearly understood. Public "admonishment" reinforces compliant participants to maintain their compliant behaviors.

Also, this feedback should be provided as soon as possible – ideally within a few hours of the errant post. Otherwise, participants may get the impression that the moderator isn't really paying that much attention.

Focusing on these behaviors on Day 1 – and giving participants feedback they need to be fully compliant – is one way to shape their participant behavior and assure that the best-possible data are collected. Taking care of these issues on Day 1 typically results in higher quality responses on subsequent days, which in turn allows the moderator to focus less on compliance and more on the content/findings.

TIP #92: Use Online Tools to Capture Video for Reports

Are you wanting to make your qualitative reports more dynamic and engaging? One way to achieve this is by including video clips in your reports.

But if you are conducting phone interviews, a text-based real-time chat, or an online message board, how can you capture video to be included in reports?

If you've ever created video clips to include in a report, you know it's time consuming. So how can you minimize the time and other expenses associated with including video in reports?

By carefully crafting a lean video capture program, you can provide value-add videos to your reports at a reasonable cost. How? Here are some easy ways to accomplish this.

- **Save videos for after the interview/discussion.** Think about videos that serve as a capstone for the entire interview/discussion ... something that can be used in the Executive Summary or at the end of the Detailed Findings section of a report.
- **Plant the seed.** Once recruited, inform participants that they MAY be asked to record some videos after the interview or discussion and that it will be optional. Letting them know ahead of time will make it easier for them to say yes if and when they are invited to do so.
- **Be selective.** There's no need to ask everyone to submit videos. You only need a few good video clips to enhance your reports. Don't invite anyone to submit videos if they have nothing to say or aren't good communicators.
- **Offer an additional incentive.** This is extra work for participants. As such, they deserve to be fairly compensated.
- **Ask for only a small number of videos.** It's less work for participants. And it's less work for you when it comes time to edit clips and put together a highlight reel.
- **Keep each video tightly focused.** Set boundaries for participants. Don't encourage them to go on and on. Tell them that the videos should be no more than a certain length (e.g., half a minute, 1-2 minutes). With less video to review, the editing process will go faster.
- **Take advantage of special pricing.** Some platform providers offer special pricing for use of message boards that are used only for homework before or after a research event. Take advantage of this to minimize the costs of this video capture.

Thus, by keeping the number of video questions to a minimum, by offering a video opportunity to only the "best" participants, by directing videos to be short, and by using platforms that give discounts for this type of minimal-use message boards, the out-of-pocket expenses will be kept to a minimum, and the amount of time needed to create clips and/or reels will be reduced. And your report will shine.

Tip #110: Use This Checklist to Maximize Participant Interaction in Message Boards

Getting participants to interact with each other in a message board is one of the biggest challenges an online moderator will face. Over the years, we've provided many discrete tips about how to foster interaction in boards. But it takes more than just one of those tips to generate the level of interaction that we seek. So, now is a good time to present those tips together – and add a few new ones.

STEP 1: Be Absolutely Clear About Your Expectations

- When recruiting participants, make sure they know that interaction is expected – not just answering the moderator's questions.
- Remind them of the need to interact with each other when login instructions are given.
- The moderator's introductory remarks at the beginning of the board should also include a reminder of the need to interact.
- Daily reminders should include mention of the need to interact.
- Be clear that incentives will not be paid unless they answer all moderator questions and all follow-up questions (whether those follow-ups come from the moderator or other participants).

STEP 2: Give Specific Examples of How They Can Interact

- Permit participants to ask questions of other participants.
- Encourage them to respond to somebody's post if they strongly agree or disagree (in whole or in part) with a post.
- Allow them to build on others' posts/ideas.

STEP 3: Make it Easy/Fun for Participants to Comply

- If the message board platform includes like/dislike/etc. "stickers" (a la Facebook), be sure to enable them.
- Help participants make a game of it. Challenge them to post a response to at least x number (usually 2-3) others' posts each day. Remind them of this challenge every day, as needed.
- Publicly applaud the first participants who interact with another participant.
- Consider paying some sort of "bonus" incentive to those who proactively (on their own) interact with other participants at least at a minimal level.
- Ask follow-up questions that require participants to review others' posts before answering; this is intended to get them in the habit (if they're not already doing so) of reading and reacting to others' posts.

Use the above checklist when planning your next message board where participants are expected to interact with each other. All of the items on the list will help to maximize the interaction you will find among your participants.

Tip #125: Manage Video Focus Group Participants' Expectations

Since the pandemic, most of us have probably participated in a video chat (Zoom being most popular in North America) with friends and family members – some of whom never participated in an online video chat. During those calls, we've probably witnessed poorly lit participants, participants being distracted, things happening around a participant that distract other participants, people talking over one other, etc.

This is fine in casual video chats with friends and family, but when using video chats for qualitative research, we should strive for a less chaotic experience. To optimize video chats, we need to properly prep our participants. Prep them during recruitment, once they've agreed to participate. Follow-up with an email or reminder call to offer advice. Bottom line: get them prepared before the scheduled video chat session so that minimal time is wasted during the session.

Here are some tips to share with video chat participants:

- **No distractions.** Suggest that they participate from a quiet spot in the home – not a place where kids are playing, or where other household members are watching TV, or other noisy places.
- **Self-mute as needed.** Not all participants can find a distraction-free zone. If that's the case, advise them to mute themselves when they know when audible distractions occur (barking dogs, screaming kids, roaring overhead planes, etc.)
- **Stay still.** Unless you need participants to pick up their laptop or phone and take you to another part of their home to show you something, you want them to sit still. So, ask them to place their device in front of them on a stable surface (NOT their lap!) and don't move it.
- **Proper lighting.** Ask participants to avoid being back-lit. During daylight hours, they should be facing a window rather than having their back to the window, otherwise you will only see their silhouette. At night, lighting should be shining on them – illuminating their face rather than their back.
- **Pay attention to others.** Tell them to watch the screen and interject only when nobody else is talking. Help them understand that only one voice is heard when two or more speak at the same time. Encourage them to raise their hand when they have something to say.
- **Have pen and paper on hand.** They may want to take notes during the session, or you may want them to write something down before discussing it. Rather than having them leave the screen to find paper and something to write with, tell them ahead of time to have it on hand.

Review these guidelines again at the beginning of the video chat session. Be sure, though, that participants are told beforehand, to maximize the time spent on actual discussion and to minimize time devoted to "crowd management."