

Using Web Conferencing to Increase the Utility of Telephone IDIs

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One of the key features of web conferencing is the ability to record the interview digitally. The audio of the phone conference is recorded simultaneously with the video of whatever is on the moderator's screen — all of the chat, as well as the documents and annotations, are captured.

Telephone in-depth interviews (TDIs) offer many advantages over in-person, in-depth interviews (IDIs), including schedule flexibility, the ability to obtain geographic diversity and the elimination of travel time, costs and energy expenses. For respondent groups where it is difficult to find enough qualified respondents in any one location to complete a day of IDIs, TDIs offer a cost-effective alternative. However, the option to use TDIs as a methodology is often limited by the need to use visuals with the respondents during the research.



Previous Attempts to Overcome TDI Limitations

In the past, our company attempted to overcome this limitation by faxing information to the respondents and asking them not to review it prior to the interview. Other times, we used FedEx to send documents in envelopes marked A, B and C to be opened during the interview. Inevitably, though, despite our most diligent efforts, some respondents didn't receive the information or forgot to have it with them for the interviews. Additionally, in many projects, confidentiality was a concern, as in who else might see the information and what would happen to the documents at the conclusion of the research. Using a priority-mail service also minimized the ability and flexibility to make changes during the course of the research.

We next progressed to posting documents on a link from our website. During the telephone interview, respondents were instructed to go to a specific web address that gave them access to the research documents. While this eliminated the issue of lost or forgotten documents, this too was not without downsides. The respondent maintained control of the document — if multiple pages were to be viewed, the respondent could scroll through them without waiting for instruction from the moderator. Unless unique password controls were programmed into the website setup (which added a new level of complexity from an IT perspective), the website could potentially be accessed again by a respondent if he or she saved the link. While we did not actually experience issues such as these, the potential was always there.

Web Conferencing as a Clear Value-Added Enhancement

Two years ago, we decided to explore the use of web-conferencing services to take advantage of the benefits of TDIs while enhancing the capabilities and minimizing some of the downsides. We wanted a way to show respondents visuals while maintaining control of the documents and providing a means for visual interaction. We specifically did not want “online interviewing,” where the interviews are conducted via “chat.” We were simply looking to enhance the telephone interview with the use of visuals.

At the time, we chose WebEx as the web-conferencing platform, although many other platforms are now available, such as GoToMeeting, Conferral and RainDance, to name a few. In reviewing some of the alternatives for this article, we have found GoToMeeting to be very similar in set up and capabilities to WebEx, with WebEx being slightly

more sophisticated but also more expensive. We felt that Conferral and RainDance were not as user-friendly and did not have all the capabilities that we required. Many web-conferencing services additionally offer teleconferencing; however, we have found it more cost effective to use our own teleconference service in conjunction with the web conferencing.

How Web Conferencing Works in Conjunction with TDIs

With most web-conferencing services, the moderator has the option to upload documents for the research into the “meeting room.” These documents can be Word documents, PowerPoint or PDF files, videos, etc. As with WebEx, the document names are easily identified on tabs, and the moderator can move among them throughout the interview. The moderator maintains complete control, moving both from document to document and from page to page within a document.

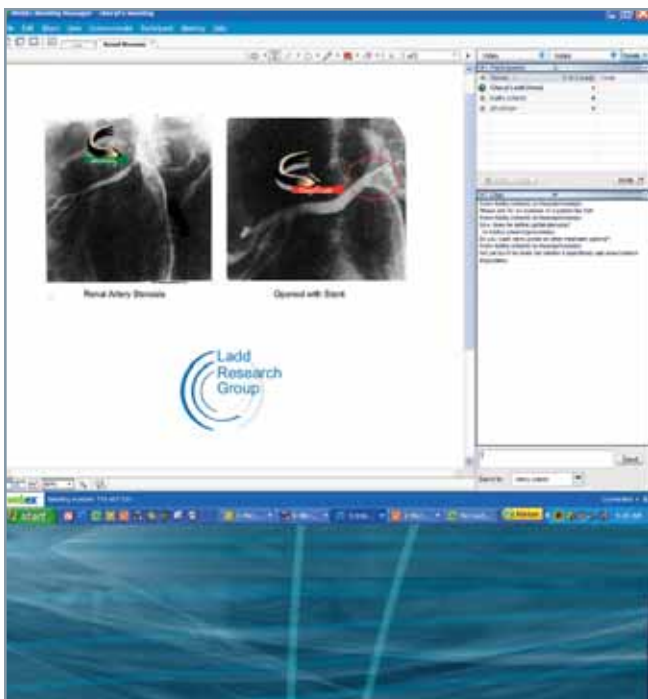
Once uploaded, the documents cannot be modified, but the moderator can give the respondent the ability to “annotate” (i.e., underline, circle, point to things, write or type comments, etc.). This is similar to having a hard copy of the document and making handwritten notes on it. The moderator can see all annotations made by the respondent. Additionally, the moderator can use similar tools like arrows or a laser pointer to call attention to specific things throughout the discussion. At the conclusion of the interview, the moderator can save the documents with the annotations for later reference in writing the report.

An option to “share applications” allows the moderator to go into Word, Excel or PowerPoint and actually work on a document while the respondent observes. These documents would simply be opened in a window on the computer, as they normally would be, and are not uploaded to the “meeting room” before the interview.

The client can also “observe” the interview by calling in on the teleconference line and logging into the web conference to “view” the documents and annotations. The participant list can be hidden from view for all participants so that only the moderator can see who is online.

Also, a chat function can be enabled or disabled for each participant. We find it very helpful to disable the chat function for the respondent but to enable it for the clients. In some regards, this serves as a back room. The clients can send messages to the moderator to probe or clarify certain points, or they can provide other instructions to the moderator throughout the interview.

One of the key features of web conferencing is the ability to record the interview digitally. The audio of the phone conference is recorded



simultaneously with the video of whatever is on the moderator's screen, including all of the chat as well as the documents and annotations. Therefore, prior to contacting the respondent to begin the interview, we upload an "interview label" — a Word document that states the project name, date and time of the interview, respondent group/specialty, initials, etc. We turn on the recording for several seconds to capture this for the archive. We then pause the recording and delete the document prior to calling the respondent. Because the moderator's screen is recorded, it is critical for confidentiality and anonymity purposes that the respondent log in with a code name or nondescript label, rather than his or her actual name, since this will be viewed in the participant list on the moderator's screen and recorded on the video.

Using Web Conferencing

In the past two years, we have used this methodology for numerous types of projects, including positioning, sales aid review, ad concept testing and new product concept testing. Since our company focuses specifically on medical research, we have used web conferencing for one-on-one interviews with physicians, nurses and patients.

 An advertisement for Columbia Focus. The background is a blue-tinted image of a bicycle wheel. The text reads: "Like the **wheels** of a **bike**, a company that understands its **customers** **moves forward.**" At the bottom right, there is the "Columbia Focus" logo, which includes a stylized eye icon. Below the logo, the text says: "Recruiting, management and implementation of qualitative research throughout the state of Maryland" and "www.columbia-focus.com 410.480.9700".

However, it would be applicable to research projects with any respondent types, for individual interviews, dyads or triads where visual stimuli are needed.

In a recent ad concept test, we showed multiple concepts, one at a time to physicians, rotating the order of the ads throughout the research. For each ad, the physician was asked to use the annotation features to circle what captured his or her attention, point to things he or she liked or disliked, etc. We then showed a display with all the ads to obtain rankings. Similar methods have been used with positioning statements. At the conclusion of each interview, the ads are saved with the annotations, and the annotations are archived on the recordings.

For another project, we had a rather lengthy product attribute list that physicians needed to rank and re-rank at various points during the discussion. We used the "share applications" feature to take the physician to an Excel spreadsheet with the attribute list. The physician would verbally indicate each answer, which we recorded on the spreadsheet as he or she watched. In this way, the physician could see the entire list and compare his or her answers and change them as needed; however, the moderator maintained control at all times, and the physician was not required to have any working knowledge of Excel.

In a new product concept test for a medical device, we were able to show videos of the product in use, diagrams and study data for the physician to get a full picture of the concept on which to provide input. Similarly, in another study, we were able to use the technology to walk physicians through numerous sets of data, including charts and tables, in order to understand how the data would

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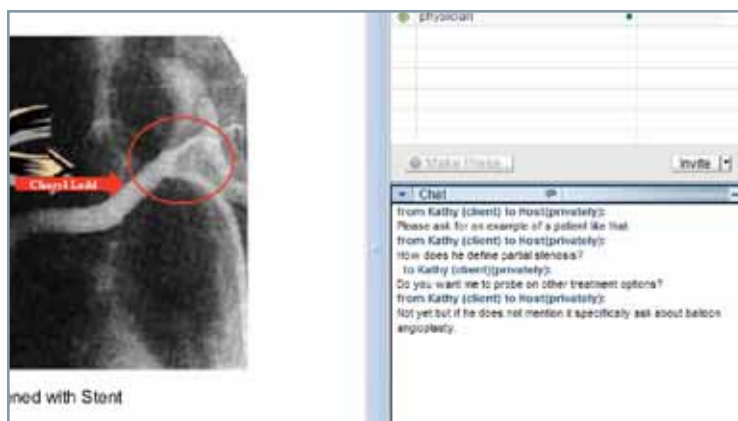
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be interpreted by the physicians and what impact it would have on their product use.

As an additional benefit, respondents react very positively to the technology and are much more engaged and interactive than in traditional TDIs.

Some Drawbacks to Web Conferencing

This method has enabled us to do many projects via the telephone that we would not previously have been able to do. However, it is not without its drawbacks. We have found it necessary to add an additional 15 minutes to the interview

time for logging in. While we specify in the screening process that the respondent must have high-speed internet access during the interview, we still find that the time required to log in is unpredictable. Not everyone is computer savvy, nor does everyone have the latest computer technology. So, even though the actual logging in and use of web conferencing does not require much in the way of computer literacy, troubleshooting can be difficult, so we allow the extra time for each interview.

Additionally, we have found that firewalls, particularly in some hospitals or offices, may not allow a physician to access the web conferencing site. However, on home computers, we have rarely run into firewall issues that cannot be overcome.

Video capabilities also have some limitations. Some web-conferencing platforms do not support all types of video applications, and depending on the size of the video or the format, not all viewers may be able to view a video.

Web Conferencing — Another Tool for the Toolbox

This technology is not right for every project and is certainly not completely free of

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challenges. However, its simplicity and capabilities do result in another tool that enables QRCs to offer clients the convenience and cost efficiencies of telephone interviews for a wider variety of projects. Client reactions include such comments as the following:

“Web conferencing provided an avenue for the use of visuals, allowing us to convey more complex ideas than would have been possible verbally. This led to more complete, precise and reliable responses from participants.”

“The addition of an interactive medium like web conferencing was enjoyable for the participants and added a great deal to the energy level of the interviews. From a client perspective, I really enjoyed the ability to interact with the interviewer by typing questions and comments during the course of the sessions. It gave me the chance to ask for a deeper dive on an issue in real time when I thought it was warranted.”

“Web-conferencing research has demonstrated value to our business in two ways. First, we have been able to test customer reaction to complex or large quantities of data, especially when we needed the customer to reference this information during the interview. Second, we have used this approach to present technologies to respondents through video or photography in a more cost-effective manner than on-site interviews or focus groups but still solicit meaningful feedback.”

Disclaimer: Ladd Research Group has not received any compensation from any of the web-conferencing services for writing this article.

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