



QUALITATIVE RESEARCH

4 Steps to Getting First-Class Results on a Coach Budget

DIALSMITH

You're feeling it too, right? Everything costs more. From travel to facility fees to recruiting. At the same time, research budgets are stagnant. The result? Those of us in field research are feeling the squeeze—we're talking Death Star Trash Compactor squeeze.

So, how do you still deliver the first-class results your clients want and expect while keeping costs under control?

The answer, for us, has been moving our qualitative research online.



Wait! Hold on. If you're ready to bolt because you're skeptical that you can get great results online or had an online experience that didn't meet expectations, we get it. But online qual research can be done effectively while keeping costs under control.

It Can Be Done.

We know because [we've done it for client after client](#), and it doesn't involve channeling some kind of Voodoo magic.

What it involves is figuring out a standard operating procedure (SOP) that mitigates the limitations and challenges of online research, while maximizing the benefits. And the good news for you? We've already done the legwork and laid out a roadmap for you to follow.

So, here's a brief look “under the hood” of how we built our online qual SOP to illustrate how you might do it.

1 **First step: Finding the right web conferencing platform for our needs.**

As we found early on in this process, all web conferencing platforms aren't created equal. We did our due diligence building out all of our current requirements and near-future requirements. Things like ease-of-use, ability to support the distinct needs of both observers and respondents, multiple breakout rooms, and security. We researched, then tested several platforms before settling on the right one for now and moving forward.

② Second step: Ensuring participants can connect and engage seamlessly.

At Dialsmith, we're relentless about process and this is where that focus really pays off. We've developed an efficient system for managing tech checks with participants well in advance of the project so we can head off any potential technology pitfalls. This mitigates the possibility of these issues causing delays or limiting the ability for participants to fully engage during the live session. Here are [more details](#) on our tech check process.



3 Third step: Making sure we're buttoned up and locked down.

Couple of points here:

First, it takes practice and more practice to work out the kinks. We've done hundreds of online qual sessions since the pandemic began, and before that, we did several mock sessions to ensure our teams were ready to go when we started hosting live sessions for clients. That doesn't mean the occasional issue doesn't pop up, but we've become nimble and always have a back-up plan in place. And we've developed the experience to know where we can be the most efficient and optimize to save on cost and time.

Second, security should never be an afterthought. Take it from us, questions around the security of your data, your findings, and the material your testing will come up. So, you need to be sure you've got answers. Here's [more detail](#) on the steps we've taken to ensure the security of our online research.

4 Fourth step: Filling in the blanks.

Even a tech-savvy group like we have here at Dialsmith can't cover every online qual need of every client. So, we've developed a helpful list of preferred partners and resources that we can turn to if a need comes up outside our wheelhouse. This puts us in position to say yes to clients even when requests come in for something we don't normally do.

As you can see, no shortcuts here. But when done right, you can get the first-class results you're looking for out of online qual while keeping your costs under control. And hey, it's a heck of a lot better to feel a sense of accomplishment than to feel the squeeze.

Want to know more about our online qual services, here's a [nice summary](#). If you have questions about doing your own online qual research, or if there are ways we can help you drive forward with your research while sticking to your budget, please [reach out](#).

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