Quick Qual Manifesto

How to conduct quick qualitative research without compromising deep insights and losing the essence of research for design

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Publication Date: November 2019
ESOMAR Publication Volume S385 Fusion 2019
ISBN 92-831-0307-6

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Published by ESOMAR, Amsterdam,
The Netherlands
Edited by: Bel Parnell-Berry, PhD.

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Disclaimer
This is an experience-based methodologically adapted manifesto. Everything that you will read comes from what we have learned from doing projects with clients of various backgrounds: pharma, tech, consumer goods, services, automotive, etc. Still, it is intended to be discussed, adapted, questioned and, overall, perceived as one of the many tools a design researcher can have in their everyday tasks.

Introduction

Design Thinking creates value by putting people at the center. Its methodology has adapted social science methods such as ethnography and rapid ethnography to understand how people feel, think and decide. However, qualitative research is often seen as a time-consuming and long process, and clients are increasingly interested in faster research and results. From our experience at INSITUM, working with projects requiring faster results, we needed to adapt these methods as well as our own way of working. This was an organic process that required us to reflect on how we were doing projects and how we were adapting to these changes without noticing it.

That is why we have developed and applied the *Quick Qual Manifesto*, which aims first to collect knowledge, and then to explain and share different learnings on how to plan, recruit, develop team skills, conduct fieldwork, analyse and deliver insights. At the manifesto's core, we find the idea that it is not about doing the same work faster, but is instead about being adaptable in order to deliver the exact value we need in each one of the phases. Also, it is about answering questions, communicating and creating impact quickly. This manifesto intends to deliver practical knowledge to speed up a qualitative research project. Its statements are not unmovable rules, but a living document that researchers can adapt to a specific industry and challenge.

The manifesto

The world is moving fast, people change rapidly and what they consume, think or do now is not going to be the same tomorrow. Companies are hungry to learn about this ever-changing reality, so they can constantly improve as well as challenge their clients. Markets and companies are not as stable as before and they need to compete inside and outside the red ocean. Designers dedicated to research are being hit by this changing environment. No one noticed the wave was coming, and traditional ways to conduct research needed to change in order to become more flexible and deliver the precise value in each phase. This does not mean a lack of rigour, depth of findings or absence of methodology. It really aims to make the most out of each step in research in order to deliver value.

Thus, if a design researcher wants to keep up, adapt and deliver relevant findings and insights, we propose the following 10 principles (and a bonus) that will help them, as one of the many tools they can find in the research world right now to achieve this task.

Principles

#1. Break the research bubble by challenging the assumptions
We have been conducting research in a very careful way, trying to control every step and variable: from a very specific calendar to the perfect observation room. We assume the key consists of avoiding variability and repeating methodologies and tools as much as we can, to standardise the process and have a successful project. Instead of thinking how to create a bulletproof process, try to question what you think is the way to tackle a problem: be critical of what you already know about the challenge, so you can recognise what you know, what you need to know and what you have to test.

By asking these questions (what you know, what you need to know and what you are testing) you are challenging your assumptions, and you can conduct research in a more free, efficient and different way, adapting to different rhythms and needs, depending on the clients' and research needs. At times, for example, we get involved in tasks that consume time and do not necessarily bring value. Why do we need to listen to interview audios? Do we have to build that complex matrix to compare data? In a workshop, is it really necessary to prepare all those materials? Or can we create them during the workshop? Assumptions are all the safe spots and preconceptions researchers have about the whole process. Try to maintain an open mind and be ready to recognise that things can change. That will allow you to clean up unnecessary tasks and focus on the MVP of your tasks. Ask yourself: what is the best I can deliver with this time? Time constraints are not an argument to not deliver value; challenging assumptions is a way to understand how to re-think your tasks in order to do them faster.

In a healthcare project, for example, the team needed to share what they had found during two sprints, and how they were advancing in the design of new solutions for patients and caregivers. Instead of doing a digital infographic or a deck, they re-thought how they could share findings faster. They used an "analogue infographic" - a wall pasted with materials used by participants during sessions, e.g. handwritten quotes, findings and printed photos. The result? They were able to share the story using minimum resources and time. Instead of four days, or even a week, of working on a digital infographic or a deck, they spent two days doing the analogue infographic. They also surprised the client since they were expecting a traditional presentation. This is the bonus of challenging assumptions: it leads to thinking of creative ways to deliver value.

#2. Stop being linear, start thinking in dual track

We went from a linear process to an iterative and finally to convergent phases. Design Thinking (DT) has four main phases: Understand, ideate, prototype and implement. Having those clear and conceptualised is part of the iterative nature of DT, but when clients want you to be agile, limits get defused and it is difficult to respect the autonomy in each phase. When planning, we usually use calendars that work in a more cascade chain way, where each part depends on the other to happen. However, when you fully understand those phases and you see what they are all about, you start focusing on the research objectives, more than the time you need to finish it.

This is when you can visualise everything and see that those phases really live in parallel tracks, not sequential ones. For example, when you are doing interviews, it is very easy to de-brief at the end of the day and park all the findings in some database, such as Excel or Word. Also, if you already have a probable solution, you can use the last interviews to directly test it. The results may not be final, but at least you can get ahead of the possible comments you receive and change whatever you need to change before the prototyping phase. For instance, during a hosting services research, the platform's UI team made changes to the prototype at the same time the interviews were conducted in order to adapt it according to the participant's feedback. At the end of the interactions, the prototype was customised according to the specific research questions, so the entire refined platform was analysed with opportunities for further development. This clearly affected the interactions, making them more specific as time went by, but the team never lost the main focus: help this platform to be more user-friendly.

#3. Not only do you have to become faster; make agreements with your client

It is very common, at least from where we come from, to see companies that have a very "agile" or "innovative" message, but still want you to work as a traditional design researcher under a traditional framework. That comes from one big misunderstanding: they do not picture the dimension of information that researchers need to manage. Unless they have been one before, it is difficult for them to imagine the amount of work that a project implies and the role they have to play in the whole process. Most of the time, we also assume we should not tell them anything.

Thus, imagine this: the client wants you to have a preliminary report in a few weeks, but takes two in giving you access to interview their stakeholders. This means that they still do not understand that if they want you to be agile, they also need to be agile. For example, they have administrative barriers like specific permissions before starting a project, tech barriers to effectively share information or they have an outdated database making the recruitment complex. Those are things you can negotiate in order to reach an agreement on what you can do to speed up the process, and what you require from their part. All the same, remember that negotiating does not mean you should carry out all the work.

Besides negotiation, a strategy to make agreements is making visible what it implies to manage qualitative data, your process and advance. Sometimes it means you need to make your progress visible and accessible, so they can have an idea of the dimension of data you are managing, what is being adding to it and how it is building up. It is a teaching-learning process parallel to the research that you need to do with your client so that they can understand. Negotiate, be transparent and faster, but also let the client know what their responsibilities are.

One good example for the application of this transparency is in a transportation project. When the team decided to use VR to share participants' homes and journeys while also sharing insights, the client was able to understand what it implies to visit different houses and going to different zones in the city. This exercise greatly reduced their expectancy of results. In terms of technology, we already have a good disposition of it. In terms of information and data, it was about keeping it in order.

#4. Focus on the cake rather than the recipe. Pursuing the result rather than accomplishing the process makes us more agile

Usually, clients and researchers value the process more than the results. As if this guarantees something, following the recipe gives design researchers certainty and trust over the project. Still, when trying to be agile, especially in qualitative research, we should remain focused on the main objective and the end of the whole project, allowing us to have flexibility to change what we are doing so we can achieve it, regardless of the road we took.

Showing more interest in the results rather than the process seems like something irrelevant, but we have found that it allows design researchers to change the perspective and, in a lot of ways, be more agile. It does not mean rigging the research, it means being open to seeing the results before we were expecting them. When focused on the main objective, you can dismiss your last interviews if you feel that you already understood a pattern, or add some other activities such as intercepts or group discussions or, as we already proposed, prototype solutions. Our main proposal for achieving this is to build in the spirit of frameworks, such as agile, inner cycles based on the deconstruction of all the variables that compose our main objective. This means a pre-analysis where design researchers should deconstruct the objective in such parts that we can easily research those topics at different moments, without compromising the project as a whole. This can allow the team to deliver results without losing depth on them and respecting the complexity of what we are researching. It also works to prove if a certain methodology is giving the expected results, or if the whole project is viable or walking in the right direction, before finishing it.

In this situation we should be clear, responsibility on how those cycles must be defined and what kind of methodologies the team should apply relies on the design researcher, who negotiates with the client about priorities and what to expect in each cycle and, by the way, what problems they will face. In the end, it is the researcher's responsibility to suggest it, but everyone's responsibility once it is decided. Going step-by-step does not guarantee results, eventually - nothing does. However, the most successful researchers always have their objective in mind and adapt their methodologies through the process of regarding what they found in conducting research.

For example: in one project for an important tech company, interviews were exchanged for cultural immersions mainly because interviews had become repetitive in terms of the answers. So, we took the main objectives, re-built the guides and went to the streets and conducted short but concrete interviews with people that matched the profile. In the end, we obtained more findings this way than having people talking about the same topic for over two hours.

#5. Not everything comes from the interviews: combine them with previous tasks to understand and decide faster

Usually, we think about the interactions as the beginning of the understanding and empathising process. We decide we do not want to "get polluted" by anything but the user, as if we were incapable of identifying those biases. Or we think of the interactions as the moment where we are going to start learning about the consumer's point-of-view. Certain tools, such as previous tasks before the interviews (digital panels or consumer diaries, for example), or active observation can help you understand the general situation over a topic. It can also be very helpful to make better decisions when deciding which profiles you need for the research, how to distribute them and also if the number of interactions proposed is the one needed.

For instance, in a project with a technology company where the goal was to understand people's financial habits, we developed prior materials that the participants then filled out with their spending cycle for one week. With this information we were able to identify patterns through which we developed a profile of financial behaviour prior to interactions, and thus reduce the sample and limit the interview guide to the issues that were really crucial or unclear at the time.

#6. Combined studies versus one methodology studies help us decide faster

The old discussion over which method is better (qualitative or quantitative) does not work for a design researcher. The transition from an exclusive (one or the other) to a contributive (a mixture of both) method, has helped research get wider and more robust. This comes from the need researchers have of understanding phenomena, not just in a macro sense, but also to explain them in detail, mainly to design methods to influence them, or find areas of opportunity. As a result, there is no manual of when and where one should apply one type or the other. If the focus is more scientific and normative, it is probably good to start by the numbers so trends can be identified and then explained in their roots. However, if you want to prove some finding or insight found in qualitative research polls or surveys, building upon that finding can help validate the results and make decisions.

Experience has shown that both methods work as long as the design researcher has clarity of what the main application is for those results. If you add the already discussed need for efficiency and speed, having both results help clients feel more confident in using those results and taking some strategic actions around them.

In a healthcare project, for example, the objective was to design a solution for patients. Prior to the qualitative phase, a quantitative study was carried out allowing the broad outlines of the solutions to be defined (e.g. whether it should be a digital solution or not, what age range it should be focused on and what were the preferred issues to be addressed). This streamlined project time-lines by limiting design possibilities. In this case, qualitative research helped us define general design guidelines and fine-tune the development of prototypes towards the design of final solutions.

#7. Become faster: involve heads and doers, not only researchers during your project
Clients do not like to get involved from the beginning. This could be because of the amount of work they have to do, or simply because they trust us and they do not start to get involved until they feel results are coming - usually in the last part of the process or right at the end, when we deliver. Ironically, not being a nuisance can turn them into a big problem. The effects may vary, but usually this extends the project by some time, because they always have something to add or change, they still have doubts that they feel need to get answered, or simply because the tone or storytelling is not as compelling as they feel it should be.

Opening the doors to decision-makers, doers and researchers can actually help the research be more agile. Decision-makers can help us classify our findings and insights in terms of what their business needs, or what is more interesting or useful. Doers can make quick changes and adjustments to the products, or they can inform and give advice about the limits and barriers of the design object. Researchers bring meaning and analysis to the process and can be a very helpful hand if they get involved from the beginning.

Having clear roles can help this activity be more pleasant and especially useful. When you invite someone to your fieldwork activities, try to give them specific tasks and jobs, and if they just want to observe, get them to understand the field rules. For example: if you are the main moderator, they are allowed to ask questions at very specific times during the interaction, or they are simply there to listen. When doing analysis, allow them to voice their concerns so the team remembers them, but also make them accountable and demand that every intervention is based on what you have already researched, and not only what they know about the business. Nevertheless, there are still cases when they do not have any time left, so the main recommendation there is to keep them on track with digital media. For example, recording a video, streaming, sharing transcripts, sending a debrief summary or just an email with the main points found that day. All this can help you get more feedback and guidance about the project and align the results with their expectations.

For a project in the financial and pawn business, we began trying to become a cell embedded in the company's offices. At first it seemed like a good idea, but as time went by our consultants felt more and more alienated and less in the frame of mind they needed. Also, results were not as innovative or disruptive as we needed them to be. Therefore, the team decided to change the conditions and invite the client to our offices and convince them to accept our own framework, invite stakeholders for interviews and try to get them outside of their usual environment. The result was completely different, and objectives were obtained without a doubt.

#8. De-briefs 2.0: participants' cards
One of the keys to discovering great insights in qualitative research, is to make de-briefs right after the interaction is completed. We may forget important points or lose valuable information if we dismiss this step in the process. However, sometimes this step is taken lightly. We may have a quick de-brief during the journey to the next interaction, or we take raw notes. The truth is that usually, qualitative research tends to wait until the analysis phase to really analyse what happened in the interview. When doing faster research, the de-brief step becomes more relevant. The 2.0 version looks for a deeper understanding of each interaction individually. Spending more time analysing during fieldwork, speeds up post-fieldwork analysis and report tasks.

Make learnings tangible through participants' cards. Define topics and templates in advance and fill them out after the interview. Doing the 2.0 de-briefs is as important as doing the interaction. Plan your fieldwork with this task in mind too: rather than having a full day of interviews, have two or three interactions with a substantial de-brief. For example, in a project for a technology company, we decided to open a social media group for the project; at the end of each interview, the team involved was able to share findings, comments and relevant quotes below each participant's photo. When we finished the fieldwork, we did not need to review notes and audio because of the information we already had in the group.

#9. Do not fall in love with golden findings - transform them into actionable insights
Sometimes, the finding is real and can be turned into great insight, but it is just not useful for your audience. As design researchers, we love to have deep findings, and we get excited when we find something surprising about people. We hurry to communicate those golden insights to the client and, sometimes, we do not receive the same excited reaction from them.

From the client's point-of-view, those stories are only relevant if they can do something with them, if they can create an impact or if they can implement improvements in their concepts, products and services. Thus, we need to change this romantic vision of finding golden insights, by transforming them into actionable insights. Design Thinking is about empathising with people as well as with your clients, so it does not matter if you speed up the research if you are not able to transfer and communicate the knowledge you gain in an insightful way.

There are two ways. First, test them all the time, mainly with your client, but also with experts on the topic. They probably know everything about it and will give you a good grasp of what is new and what is not. Second, plan some check-points with your client. Do not fear the pre-check or context review; if you do the right disclaimers and give the meeting a purpose, they will know what they are in for and what its role can be. If your direct client is a high-range manager, invite experts from their company - someone that can give you a good sight of what is happening in the organisation, and if the ideas can help them in the future.

This is very common in projects that not only appeal to our interest as researchers, but in our objective to build a more human world. We used to have a client that wanted to know what he should do to build a better infrastructure around his distributing beverages business. When we got into the field, we found out that traditional business, besides needing new infrastructure, needed training. So as you can imagine, we tried to build a strategy that mixed both things, but by the time we got the results to our client, he felt we did not hear him well and that we drew conclusions without taking him into account. Happily, we could explain ourselves and re-write part of the document, but still, this could have been avoided.

#10. Tell them a good story, but especially a useful one
Usually, storytelling is a problem design researchers attack as the last part of the process. All the insights, findings, opportunities and solutions are on the table, but design researchers do not know how to arrange them in order to tell a story everyone involved wants to hear. This comes from the old way we used to communicate results. What we end up providing is long decks of information, where one slide depends on previous slides to be understood and is structured based on the sequence of the discussion guides or the client’s brief.

Is that bad? No, but it is a safe spot. Before knowing what story you should be telling, a good strategy can be letting the users and their experiences be the ones to set the bases, then contrast it with what the client already told you he needs, and what you think will help achieve the main objective. Communicating faster can be done with short stories through storytelling. Sometimes you will find there is no big story, just short stories that help you tell findings, territories and solutions. Other times you will be able to tell a big story where everything is connected and circles to the end, or is left for a sequel or spinoff to happen.

The key is to ask yourself and your team two questions: is it possible my client just wants the information as a diagnosis? Or does he or she need it to design something new or different? Or both? Have in mind that short stories usually help to apply focused solutions, and long stories help them build long-term strategies. Again, responsibility relies on the experts (design researchers) but needs the approval of the client to have accuracy. For a brand project, we decided that a *Brand Book* was not enough; that is why we decided to build a game that allowed the clients to learn not just where the information came from, but also to which insight every proposal belongs to. In the end, the game became a standard for all the projects within the company - especially the ones involving new products.

Bonus: Make the mess invisible in order to create a seamless experience
Sometimes, what the clients see is what they think. They know that throughout the whole project, no matter its length, some things will happen. The problem is not that they happen, but that you do not have the tools or flexibility to solve them. The problem with this is that it can affect the whole project by bringing doubts not only to the process, but to the research as a whole. Besides having the tools to solve any problem, the key is to keep communication channels clear and, by all sources, transparency on the actions taken - both the good ones and the bad ones. For example, the reaction to a bad recruiting experience can be very different if you start by warning the client from the beginning, or if you leave it to the last minute - especially if you start offering solutions and explaining the reasons for what is happening.

In the end, you decide what you show them and in which tone. Therefore, if you know a project can be tricky or has a high risk, build one channel of communication and rely on your team to solve the problems, or at least have good arguments to explain them.

Closure: discussions around the manifesto

As you can see, all these principles are built upon experience and solutions, applied and replicated depending on the situations that our teams face every day. Nevertheless, we invite every reader to question them and use them as they see fit. The following are some of our internal discussions around the manifesto that intend to leave the door open for other design researchers to comment and discuss freely. We decided to order this discussion into topics so that their pros and cons can be read easily.

Topic 1: Why is there a request for faster design research results? Faster implementation due to an organisational and digital transformation leads to a faster research demand.
One of the main effects and changes observed on companies is digital and organisational transformation. Companies are now more flexible, divided into specific teams and with less (or in their own way reduced) hierarchies and bureaucracy. For us, as design researchers it is pretty common to work with a team that is in charge of some feature in an app, or just a small part of a bigger service. As they are specific, their problems are pretty specific, and we should therefore find specific solutions.

Up until this point, everything matches - we can bring them specific solutions if the objective is well defined. The problem comes when we try to implement those solutions. Usually, the fact that teams are more autonomous or specialised does not guarantee that they do not need the permission of other parts of the company - or the main head in another country - to change or adapt something. So, the big challenge still in the works is how we help them change their mind-set across the entire organisation, not just in the operative parts.

Another story comes from the digital transformation. Almost every company wants to do this process and by now accepts it is fundamental in their development. For us, the challenge here relies on giving them what they really need and not just what they want. Also, having this transformation helps us by turning our work into a continuous effort, and not just an in-and-out relationship. Although both transformations are happening in LATAM - demanding better, faster and more effective research – we are still kilometers away from perfecting this process. The big challenge is to adapt to this always-changing dynamic, by always reviewing and re-reviewing our capabilities and processes.

Topic 2: What type of projects can be addressed with this perspective?
The second big discussion around quick qualitative research is whether or not all kinds of projects could be developed through this perspective. We discovered it has nothing to do with the type of industry, but the needs expressed by the client. That being the case, complexity and knowledge are key variables that help us understand which kinds of projects we are able to solve within the manifesto without putting the project at risk.

Knowledge variable: This variable is based on the knowledge the design researcher and the client have over the main objective, as well as if it is clear and in the same terms for everyone. It has to do with access to information and other sources that can feed the project. In the end, it is relevant in terms of fastening the process with solid ground.

Complexity variable: This is not about the industry, but about what you want to know. There are topics that tend to be more complex, (like women's reproductive rights) or others that are less complex (a product test on a drink). The key to this complexity variable relies, besides the topic, on what the team will have to face in order to get the right profile and, overall, being able to contact them for the interactions or activities.

When crossing both variables: *Quick Qual Manifesto* lives on Insights Sprints and Validation Test quadrants. The left side of the model is more about baseline research and its difficulty to speed up the process of this type of project, since there is little knowledge and the problem is too complex.

Insights Sprints: A key element of the DT methodology is to understand the real problem to solve. Insights Sprints are an approach to tackle complex problems, and it looks to deconstruct the problem at the definition stage. For example, we may not be able to solve Mexico's mobility issues all at once, but by deconstructing the complex problem into smaller issues, we can understand and solve part of the problem, deliver responses to the specific problem and start again. Deconstructing allows us to have small victories and learnings of a complex problem.

Validation Tests: When you have a lot of knowledge around the project and questions are simple, we are usually involved in projects where people are already testing or iterating some solutions. Usability tests can be a typical example where we try to understand certain parts of a prototype and how to make it better.

Topic 3: What are the limits and warnings of fast qualitative research?

When developing this topic, debate among the design community emerges. There is a discussion centered on whether we should respond to this quick qualitative research demand or not. Part of the design research community avoids quick qualitative projects, because they can be seen as less deep, with less impact and losing the beauty of design research. However, what the *Quick Qual Manifesto* aims to explain is that it is not about eliminating these elements that are essential to the DT methodology, but instead about defining how we can make the most out of them, and what can be done in a different way. Even more important than doing essential things in an efficient way, is to recognise that our core value as innovation consultants, lies in the meaning we give to people's stories. Still, there are some limits perceived by some that can be pushed back over time.

- **For some, it is not a real research process:** It could be that they perceive it as just a part of, or not even a process at all. The reality is you need senior design researchers to minimise risks. Still, for the more process-oriented clients, skipping phases or changing parts of the process can be a bad sign.

- **Agility perceived as loss of depth and bad insights:** It seems like there is no time to do analysis and understand the reality in people's lives. More traditional companies want the process to be followed as it was designed; if not, results may be compromised.

- **Pressure for instant results and delivering insights on-the-go may lead to poor analysis:** It is no secret that in qualitative research, people do not always mean what they say, or what they say is not really what they want. It is pretty easy to lose focus when the ability to find the right information falls squarely on the design researcher, especially when you are unable to balance the phases, or work in two tracks.

- **Industry is less interested in new topics for research:** Innovation has become more about testing and iterating existing products than finding new ones. The problem with this is that qualitative research performs only as a reviewer that helps in the implementation process, where they could be helping in others. Wanting to be agile can eliminate the possibility of doing new research.

- **Providers instead of strategic allies:** Sometimes clients want you as a vendor who helps them get the right people in the right context, and ask the questions the way they want. This practice is common in a lot of industries and comes from the belief that it is easier to do it by themselves, than allowing an external voice to participate.

- **If you are not careful and use the right tools, teams can get tired:** This is a common thing when a team is trying to be more agile, but tools and planning are not working. Also, being able to grow a team in this context needs a learning and adaptation process that cannot be forced.

Topic 4: Is Quick Qual for everyone?
It is not about being capable, is about developing those capabilities. Anyone can do it, or learn to be a quick qual researcher, but they need to have the following attributes, besides the ones a design researcher already has:

1. **Adaptation and flexibility:** Being able to adapt to all the situations possible - or finding the tools for that - is essential. Also, always attract new and more useful techniques.
2. **Critical thinking:** Being able to question everything helps these researchers in their everyday tasks. Also, admitting what you know and what you do not helps with asking the right questions at the right time.
3. **Resilience:** They will face a lot of problems and barriers. It is about solving them and letting them go. Fixing the huge issues you faced in the project will encourage the following ones. Letting go and making a post-mortem can help you identifying the future problems, and get ahead with the solutions.
4. **Boldness:** Having the ability to express themselves no matter who is in front of them. Understanding how important it is to make decisions. It is also about being clear that, at all times, you are just the channel in which the user expresses him or herself.
5. **Open eyes:** To identify both opportunities and problems.

Topic 5: For our clients, how quick is quick?
Sometimes our clients think about being quick and they are just telling us they need to have something to work with. Bringing preliminary results can be tricky if they lack the context or clearness to be considered a work in progress; this can make the client nervous and certainly worried. Therefore, "quick" can mean bringing some findings, some field materials, some hypotheses or more questions. The key is to ask our client what they will do with the information you are providing them, and which tone is the best for them. So the recommendation here is the same as the rest: communicate with the client.

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