# The "Do-it-Yourself" Focus Group

By Suzanne Boswell

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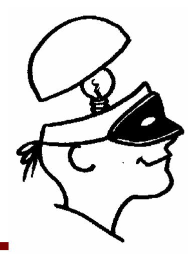
If you've read any of my work or attended any of my presentations in the past, you are familiar with the focus group concept. As a "mystery patient," speaker and consultant, I routinely conduct focus groups to help me understand—and likewise to help my audience understand—the patient's perspective.

I've held focus groups to uncover what fosters patient loyalty to a practice or increases a person's likelihood of accepting treatment. I've used focus groups to learn everything from how patients view a practice's infection control measures to how they view the front desk staff. I've conducted focus groups of practitioners in order to help my audience better understand relationships between specialty and general practices and to determine how to build stronger, mutually beneficial relationships.



The focus groups I've led have been designed to investigate patient attitudes on a national basis. Any practice may benefit from these observations. However, every state, city, town and practice has its unique challenges that deserve attention. For this reason, it may be worthwhile for you to conduct your own focus group. The more you learn about your patients, the closer you come to meeting their needs and retaining their loyalty.

**Want to know more about your patients? Try conducting your own focus group to get inside your patient's head.**

From the efforts of such a focus group or series of groups you will gain insight into the following:

• How your patients view your practice.

• What patients view as your strengths as opposed to your viewpoint of your strengths.

• What patients view as your weaknesses. This is arguably the most important information to be gained. When you learn where the weak links are you come closer to retaining patients, strengthening trust and increasing treatment acceptance.

• Why and how patients chose your practice. This is particularly important when you are questioning those who represent the desired target base for prospective patients.

These kinds of insights are used by Fortune 500 companies to understand the customer and meet the customer's needs. From businesses as diverse as the automotive industry and the hospitality industry, marketing analysts are taking the pulse of prospects and patrons to keep in step with prevailing attitudes. It is the wise practice that recognizes the importance of this, especially at a time when patients are so consumer-oriented.

## Prepare for the focus group

What do you want to learn about your patients? Are you wondering how to fine tune service in your practice? Do you want to learn how patients view your marketing efforts, or how the team presents the practice to the public? Are you uncertain what sorts of information patients will want to see on your Web site? Do you want to learn the reasons they do or don't accept treatment? Maybe you're thinking of introducing more esthetic treatment into your practice and are wondering how to pique the interest of members of your community. There are endless reasons for considering this method of gathering data. Whatever your reasons, it is vital that you clearly define your goals before planning the group session.

First, determine what information you want to gather. Let's say that your goal is to learn how new patients feel about your practice. That concept will clearly guide the choice of participants and the questions that must be developed.

You may opt to discuss and write the questions with your team. Brainstorm a series of questions. Once you have a list put together (no more than 25 questions because you'll have to narrow the list down!), break them into categories. For example, if you have five questions on the topic of office comfort/décor, group them together. During the focus group, questions on one topic should be posed in some sort of logical manner. Once the participants are thinking about a particular topic, it's not a good idea to jump around too much.

The next step is to put the list in order of importance for the facilitator. Be sure that the most important questions are posed early. If the group is highly talkative, you might not reach the last questions on your list. The number of questions depends on many factors. Obviously in a two-hour session, there may be more questions than in a one-hour session. But the style of the facilitator and the personality make-up of the group will be significant factors also. It's better to have too many questions written than too few. A good number to target for an average focus group is a list of 15 prioritized questions, with the understanding that the questions at the end of the list might not be asked.

Ensure that questions are phrased objectively. Don't slant the questions so that the participants think you are looking for a specific response. For example, "Was the receptionist friendly when you called the office the first time?" seems to be seeking a positive response, and participants who had a negative experience may be hesitant to offer their true feelings. A better way to phrase this would be "How would you rate the degree of friendliness of your first call to the doctor's office?" You might encourage participants to be totally objective by offering a scale of agreement, "Would you rate the call as better than average, average or less than average?"

## Select prospective participants

The ideal focus group size is eight to 10 people. However, when selecting participants, target more people than you need. It's likely that not all will participate. Get 10 to 12 confirmations because on the day of the focus group, there will likely be "no shows" of at least one or two people. If all 11 to 12 participants arrive, this is still a manageable size.

Target individuals you feel will actively participate and who will be as objective and unbiased as possible. Assure prospective participants that their responses will be reported in aggregate form and that their anonymity is guaranteed.

When targeting participants, there are two schools of thought. One is to select individuals who represent your present patient base (you may opt for only new patients or patients of record). The other option is to narrow your selection to the type of patient you want to have in your practice. If you are "upgrading" your patient base, then you'll need to target prospective participants in your community who represent the desired demographic.

If you plan to focus on a very specific topic such as implants or cosmetic procedures, you may want to further narrow your list to potential candidates for these procedures and/or to patients who have completed treatments in these areas.

When and how do you invite prospective participants? After creating your target list of individuals, call each person to determine degree of interest. This means that you must have the date and location arranged in advance. Be sure to indicate that no one from the practice will be in attendance and that participant responses will be anonymous and provided in aggregate form only. Let them know if you will have refreshments as it may influence those who will be coming directly from work. Then advise what form of "thank you" will be provided for participants (incentive ideas follow below). Initial calls may be made two weeks ahead of the meeting.

Mail a postcard or letter to participants. Include a map to the meeting location and emphasize the importance of starting the session on time. Make courtesy calls the night before the session to ensure a full group.

## Incentives to participate

Before you contact prospective participants, think about what would encourage a patient to participate in such a group. Understanding participants' motivations can be helpful in narrowing down your list of prospects. Consider the following reasons:

• Sincere desire to give objective input that would result in improved service to the patient and others

• Respect and/or liking of the doctor and team

• Past positive or negative experience in the office that they would like to air

• Curiosity of how a focus group works

• Past positive experience in being a focus group participant

• Assurance that comments will be anonymous

• Interest in the perks that are offered for participation

A note about incentives: Although some patients will be pleased to participate without compensation, others will be more interested when given an incentive. In commercial focus groups, participants are compensated monetarily. The amount can vary widely depending on the group topic and the business or corporation that is funding the research. The most common amounts offered are from $25 to $100. The dental practice may find it more meaningful to offer the value in a specific treatment or to provide a credit toward future treatment. This may be provided in "gift certificate" form on conclusion of the session.

## Who will facilitate the session?

It may be easier to say who should not conduct the session. The doctor and team members should not conduct the session or be in the room during the focus group. All patient objectivity would be lost. The facilitator must be completely unrelated to the practice and should not be a dental professional. Participants need to feel they don't have to couch their responses because of possible bias on the part of the facilitator. If you are located in a medium- to large-population area, you will likely be able to hire a professional to facilitate the session. Look in the Yellow Pages under "Marketing" or "Market research." Be sure to interview the facilitator in advance and ensure that he or she understands the goals and intent of the session.

The facilitator should have strong interpersonal skills, encourage all participants to communicate and indicate no personal bias. He or she must be strong enough to manage the direction of the conversation and to make sure that low-key individuals are not overwhelmed by more boisterous participants. This skill often requires experience and should not be left to the novice. Ensure that the individual is not so young that he or she lacks credibility or business experience. Also, the facilitator's behavior or appearance should not instill antagonism, jealousy or competition among participants.

## Where and when should the meeting take place?

The session should never be held in the practice, since this would severely discourage participant objectivity. You can usually rent a small conference room at a local hotel, office building, club, church or library. Rooms also are often available through the same market research organizations that provide trained facilitators. Be sure that the selected room is free of extraneous noise or distraction.

Most focus groups are conducted on weekday evenings. Schedule it at a time when participants can come directly from their offices, yet have time to get through traffic. If you conduct a one- to two-hour focus group the start time may be 6:00, for example. Most groups scheduled for this time slot provide refreshments or snacks for participants. Since they are coming from the office and will be working through dinnertime, provide light sandwiches, coffee and beverages. Notify them ahead of time that refreshments are available.

The length of the meeting may depend on many variables, such as how intensive the session is to be, how many questions you've included, how experienced the facilitator is, etc. If you opt for the longer two-hour session, be sure to allow for a 10- to 15-minute stretch break.

## Gathering data

As discussed earlier, the doctor and staff will not be present at the focus group. So how do you gather your responses? Most professionally run groups are audiotaped and/or videotaped. Managing this with patients of record can be a delicate matter because the doctor/patient relationship is so personal. Existence of this equipment may be intimidating for some. If participants fear that you will be able to see or hear their responses, they may not be as candid.

A professional facilitator can manage this situation by ensuring participants that all responses will be transcribed and collected in aggregate form, and that no one from the practice will view or hear the tapes. In many cases it is wise to notify participants ahead of time that the session will be taped.

If you prefer not to include taping equipment, you may opt to have a second person in the room to take notes. It is exceedingly difficult for the lead facilitator to ask questions, direct the group and take notes. If you do tape the group, have a professional transcribe the tape(s), eliminating the respondents' name in the text.

During the session, work toward having participants speak one at a time. If too many people are talking at once and interrupting one another, it will be nearly impossible to take notes or interpret the tape(s). The facilitator must manage this situation with confidence.

## After the fact

Following the focus group, the facilitator and any observers should have a review session. At this time, they can record all key points


Suzanne Boswell Presentations
Website: www.BoswellPresentations.com Email: Suzanne@BoswellPresentations.com

while the commentary is fresh in mind. Then consider the conclusions. Sometimes a genuine dictate comes from the group. This should be noted and addressed promptly in the office. Other times, you may feel you need more information before acting on the commentary.

Businesses that use focus groups for market research often conduct a series of sessions to ensure an accurate sampling. In the case of a practice, a single session will certainly provide valuable insights. However, you might consider a series in close proximity, or four sessions planned over the period of a year to measure improvement or to address additional issues.

If you make significant changes in policy or services as a result of patient mandate, be sure to let your patient base know this. It speaks highly of your practice and says that you care what patients have to say and that you listen to them.

## What will this cost?

A focus group may be conducted in a very cost-effective manner or it may be pretty pricey. The range of total costs is very wide. If you manage most of the paperwork and calls yourself, if you are able to secure a public meeting room at no cost and if you have access to a local facilitator then your costs may be negligible. At the other end of the scale you may contact a market research or advertising firm to manage details. They can take your prospective participant list, make the calls, handle the paperwork, provide the facilitator and the location and create the final report as well. For such services check your local yellow pages under marketing or advertising. Your costs using this full-service route can reach several thousand dollars in major metropolitan areas. As you can imagine however, there are many options in between where you manage many of the functions and have professionals manage some functions.

If you offer incentives, you will need to pay for those out of pocket. In addition, there's the cost of refreshments as well as the cost of the room. You can keep room costs down by doing a little research in your area. The facilitator fee varies widely based on your location, the experience of the facilitator and other factors. You may lower your cost for the facilitator even further by using a non-professional who has good interviewing skills and relates well with people. Again, though, do not attempt to use anyone from your practice or anyone related to your practice. If you audiotape the session, you also will need to factor in transcription costs.

It is entirely possible that the expenses related to this marketing research may be tax-deducted. Be sure to discuss this with your accountant. In considering the investment you will make, don't forget the long-term benefits that come with insights gained from such a group. As anyone in marketing will tell you, the first step in meeting your customer's needs is to know your customer…or in this case…know your patients.

You may also consider conducting an in-house survey of patients.  Surveys may be based on issues gleaned from focus group, enabling you to ask for deeper information from patients. See our article on ***In-Office Surveys to Measure Patient Satisfaction: Keeping Your Fingers on your Patient's Pulse.***

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Website: www.BoswellPresentations.com  Email: Suzanne@BoswellPresentations.com