

**Market Research Techniques Table**

TECHNIQUE	USE THIS TO...
<p><u>Shadow frontline staff:</u> Spend a few hours following a field employee as s/he interacts with clients and completes typical processes.</p>	<p>Understand client-staff interactions; reveal inefficiencies or frustrations on the part of staff; generate ideas for ways to improve clients' experiences with staff.</p>
<p><b>Household/workplace interviews:</b> Visit clients where they live or work to observe their daily activities.</p>	<p>Understand how customers conduct business, interact with their own clients, and use money. Observe household and business assets.</p>
<p><b>“Fly-on-the-wall” observations:</b> Unobtrusively listen and watch the way customers interact with staff, points of service, and even other customers.</p>	<p>Gain insights into customer behavior without influencing it. Sometimes clients behave differently when they know they are interacting with their FSP (e.g., provide overly positive feedback). Using this technique removes that bias.</p>
<p><b>One-on-one interviews:</b> Talk directly with a specific type of client.</p>	<p>Get answers to questions about a certain type of client or gain insights into multiple areas of a single customer's life (e.g., spending several hours with one person to observe and talk about their business).</p>
<p><b>Focus groups:</b> Conduct short, targeted discussions or longer workshops with groups of clients.</p>	<p>Gather feedback on a specific research question— “do you understand our insurance product?”—or explore a set of ideas to uncover customers' beliefs, biases, habits, and goals.</p>
<p><b>Written surveys (paper, SMS, online):</b> Gather written feedback to multiple choice (e.g. “rate this experience”) or open-ended questions.</p>	<p>Gather feedback on specific questions (e.g., “how was your branch experience on a scale from 1 to 5?”) or allow customers to leave general feedback (e.g., suggestion box).</p>
<p><b>Mystery shopping:</b> Managers or external consultants interact with the institution by purchasing a product, asking questions, registering complaints, or behaving in a certain way, and then report on the experience.</p>	<p>Understand a real customer's experience with the institution. If staff know they are interacting with a researcher or manager, they may act differently (usually better). This technique removes that bias.</p>