



Best Practices

FORUM BEST PRACTICES

BEST PRACTICES FOR MODERATING ONLINE FORUMS

You don't need to be a professional focus group moderator to run a discussion forum. However, as moderator, you set the tone and it's your job to foster an environment for active participation and encourage discussion to get the information you need.

Here are a few tips for moderating an online forum and creating a comfortable, interactive discussion environment. The result will be honest and high quality feedback to support your research goals.

FOCUS YOUR QUESTIONS

Don't fall into the trap of bombarding your forum with too many questions. This is not a focus group where you have a captive audience for two hours. This is an online forum where people can come and go any time and may never come back. Start with three or four key conversation starters with interesting, controversial and thought provoking subject lines directly related to the issues you are researching. Too many questions will result in less focused responses of little value.

CLEAR INSTRUCTIONS

Give clear and concise instructions about what you're looking for. Do not be afraid to set boundaries on the type of content (for example, no vulgar language) and be clear about consequences (removal of comments, blocking of participants in extreme cases of abuse). Make sure your forum participants understand exactly what you are looking for.

If you have multiple questions in one thread, use numbers or bullets for differentiation (for example, "I'd like to find out what you think about these 3 things"). If you want a story, be clear with that request, otherwise you may get very short answers without the detail you were hoping to receive.

AUTHENTICITY

One of the challenges with online forums is that people can't see your face or hear your voice. So you need to work harder to establish their trust so they will, in turn, share their opinions. The first step in establishing trust is honesty. Introduce yourself and don't be afraid to be less formal and more personal. Share something about yourself (what you do, what you want to learn, something funny/interesting). If you're not sure of an answer to a question, tell your forum you don't know the answer and that you find out and reply to them quickly. Do not try and create a persona because a particularly insightful forum member will always call you out.

TO NE

When responding to comments and questions in your forum, remember to maintain a conversational tone. DO NOT use template responses. Personalize your moderator posts by using the person's screen name in your reply or directly quote their post. Make your font bigger and different color to stand out.

BE DIRECT

A forum is for encouraging dialogue and planting conversation seeds. Just like conversations in real life, forum discussions can get off topic and head down tangents. Asking direct questions will get you more direct and honest feedback than trying to come at a question from different angles. If your questions are not getting answered the way you hoped they take the opportunity to make some tweaks and put it out again. Be careful not to ask closed ended questions, though. That's what surveys are for.

CARE AND FEEDING

You have spent a lot of time designing your forum getting the invitations and reminders out and people are now joining. While you want your participants posting comments and replies, now is not the time to leave them to their own devices.

As a moderator you also need to be actively "caring and feeding" your forum. That doesn't mean you have to be chained to your browser! Make a plan for when you are going to review discussions, researching answers to questions as necessary and devising comments or questions you want to pose to your forum. As a general rule, set aside two to three hours for forum management the first day of launch. After that, plan to spend at least 30-60 minutes per day for the duration of the forum.

BE APPRECIATIVE

Show you appreciate that people are spending their time in your forum and sharing their personal opinion. Greet your first posters personally and thank them. Make a habit of thanking new participants when they make their first comments. Post responses that make it very clear that you are reading and considering all of the information they are providing you.

BEST PRACTICES FOR ENCOURAGING THE DISCUSSION

Post additional probes to individuals, global follow-ups to everyone in a new thread, and any new questions you have in new threads. Remember – conversations don't happen by magic. There are some standard comments you can use to encourage people to participate in your online forum. However, be cautious with using probes that are too packaged as this can take away from your authenticity.

Here are some samples probes that you can personalize and use to moderate your forums and get the most out of your participant comments:

POSITIVE REINFORCEMENT

- Great comment!
- Thanks for your thoughts!
- Interesting comment!
- Thanks for sharing your point of view!
- Thanks for sharing that story!
- Thanks for sharing that experience!

INCLUDING THE GROUP

- What do the rest of you think?
- Do the rest of you agree or disagree?
- Anyone have a different experience?
- Anyone have a similar experience?
- Does anyone have a different opinion?
- Anything else to add?
- Did we miss anything?

CLARIFYING

- Could you explain why you think that?
- What do you mean by?
- Trying to better understand.....
- How does this relate to?

EXPANDING on a topic or

- Tell me more about that.....
- Imagine you are.....
- What lessons can be learned from this experience?
- Who, What, Where, When and How?

All of these comments or phrases, and any variation, can be used to feed and encourage discussions.

BEST PRACTICES FOR EDITING OR REMOVING POSTS

It doesn't happen very often, but it is always good to be prepared. Depending on your audience and topics, it may be necessary to remove or edit content from a participant. The scenarios below provide a plan of action for dealing with inappropriate posts and posters in your forum.

- **Participant shares private information** such as introducing themselves with their full name, sharing email addresses and telephone numbers. The privacy of participants is paramount, even if they don't fully appreciate it themselves. This issue is very easy to address. You can simply and easily edit the comment to remove private information using square brackets to indicate some personal information was removed. If the entire post contains an excess of personal information and no other relevant content, simply remove the entire comment.
- **An inappropriate comment** made about another participant in the forum should never be tolerated. The atmosphere of a discussion forum should be a comfortable safe place for people to have a conversation. While this is a rare occurrence, participants who are not respectful to others should be dealt with swiftly. As with personal information, you can choose to delete a portion of the comment or the whole post.
- **Awkward comments** might include personal opinions or situations. Sometimes people share too much about the wrong topic! They may reveal serious health issues, unpleasant situations or politically incorrect opinions. The best approach is to attempt to keep them on topic by re-asking a question or directing them back to the discussion at hand.

These are edge cases which rarely happen, but when they do it is good to be prepared. A discussion forum is just like any other conversation with a group, where people can go off topic or be inappropriate. As the host of the party, you need to control the discussion directing it toward the positive.

BEST PRACTICES FOR ANALYZING AND REPORTING FORUMS

ANALYZE AS YOU MODERATE

Moderating is more than managing your forum. You are digesting and absorbing the content as you manage the conversation. Take advantage of this multi-tasking opportunity to identify emerging themes and trends. Take notes and identify particularly poignant quotes while you moderate. This will make reporting on your online forum much faster and easier. Take advantage of your time within the tool to speed up the reporting phase of your research.

USE A VARIETY OF TOOLS

Use all the tools at your disposal; both inside and outside the Firefly. Firefly Forums provides the moderator with a range of tools for analysis including agree and disagree voting, new post identification, threading hierarchy and number of replies to identify posts. With an easy export to Excel, moderators can further analyze posts by filtering on any data point in the profiling questionnaire, appended data or survey data. Sort and sift by any data point to better understand how a sub-segment feels about your topic, such as heavy users of your product or younger customers. Conduct word searches related to your emerging themes or run a word cloud of the comments to help identify and illustrate key themes. Mark quotes that match the themes by doing a search of key words.

IDENTIFY THEMES

Identify three major themes that are emerging from your discussion. Three is a nice digestible amount for your internal stakeholders. You can have sub-themes if necessary to provide a more in-depth view of that topic. People learn and absorb information when done through story telling instead of just stating facts or figures. Frame your themes as a mini-story to better get your message across. If you conducted an online survey and forum, you can interweave the results of your discussion forum with the results of your survey.

ADAPT YOUR REPORTING STYLE

Use different reporting styles to get your message across: email update, memo, top-line report, and presentation. All of these formats are completely valid and completely effective in communicating results to your stakeholders. Consider your audience, consider your timelines, and consider the business issue you are reporting on in order to select the right reporting format for delivering your insights.

Below are some example reports to demonstrate the breadth of reporting styles you can use to communicate the findings from your discussion forum. They are provided to open your imagination to the possibilities of reporting but no format is right or wrong. It depends on what is right for you and your organization.

Profiling your Customer or Target Market

Urban Hipsters: Tech-Savvy with a Global Mindset

Y2 (30-44; No Kids; HHI 100k+)

Hi, I'm Chris from Yorkville



- TECHNOLOGY and SOCIAL MEDIA are essential for news consumption and interaction.
- TORONTO STAR MEDIA GROUP plays a medium role in media consumption patterns because interaction crosses so many channels and levels of interest.
- LOCAL NEWS is as important as INTERNATIONAL NEWS on all fronts, but especially politics, entertainment, sports.
- INDIVIDUAL OUTLOOK for the future is positive but there are concerns about GLOBAL state of affairs both economically and politically speaking.
- PASSIONS include enjoying city life as much as possible before starting a family.
 - Vanity (fakes, culture, people, food)
 - Priority (everything is within walking distance)
 - Urban yet better views and meals (live bands, outdoor restaurants, small of food that transcends onto street)
- His dog gets him up in the morning and social scene keeps him up at night.
- BRAND RELATIONSHIPS are strong but they have high expectations for authenticity and fair play.

I have staying up to date on what's going on in my community and rest of the world. And I HAVE to stay up to date on the latest business trends and issues for my work. In the morning I get up and check news from my computer while I'm getting ready... with a focus on what the day says like the BBC. At lunch I catch the news on the radio. After work I follow the news on my computer to see what the influential people I follow are saying. I also follow what on Twitter... they've got amazing content all of the time on innovations and tech, and I like to watch something on TV once at least once a week. In the evening I have to be on my toes because my girlfriend always wants to chat and debate about what's going on in the rest of the world... and she's very knowledgeable!


Leveraging Word Clouds

Staff Interactions

Positive Descriptors:
Staff are always like this...

Looking at the extent to which staff are always exhibiting positive attributes amongst all shoppers indicates that for the most part staff are being respectful, nice and polite.


Where the gap becomes apparent is in the elements related to their overall job satisfaction/morale and training. Staff are less likely to be efficient, knowledgeable, confident, enthusiastic and empowered.



Negative Descriptors:
Staff are like this at least some of the time...

Looking at the extent to which staff are always or sometimes exhibiting negative attributes amongst all shoppers indicates that staff are confused, distracted, inconsistent, and stressed. All elements related to job satisfaction and training.

Most staff are not purposefully being rude or inconsiderate to shoppers.



Newsletter Style Reporting

New Year's Resolutions Research Brief

Methodology
The New Year's resolution forum was deployed to all members of the Community. Members were asked to start topics about their New Year's Resolutions.

Popular New Year's Resolutions Include:

Being Grateful: Members strive to be more grateful and thankful for all the wonderful things they have in their lives.	<i>Life has not always been the proverbial bed of roses, but I have a wonderful family, a home that is comfortable, thoughtful and kind neighbors, my breath (at last) and work that I like. My New Year's Resolution is to keep in mind all the blessings that I've been given. Especially when I want something that is not in the budget.</i> CPH006, 57
Being Less Cynical/Being More Positive: Some members have realized that in the hard times they've had last year, they've dwinded on being positive and started being more cynical. Changing this is something many strive for.	<i>It's come to my attention that I am a single cynic. I tend to expect the worst of people and I wonder if that's a self-fulfilling prophecy. Or maybe people are just generally jerks. In any case, I want to try to have faith that people are generally good and give more credit than the benefit of the doubt. I want to be open to being surprised.</i> MIN0000000, 33
Get Something Done That They've Always Wanted To Do: Many members have long-lasting goals they've never had the motivation to accomplish. Some want to finally accomplish these goals in 2011.	<i>I am going to copy all my albums and cassette tapes to cd and then to my iTunes...this should take all year!</i> Walbak, 52
Relax More/De-Stress: 2010 has been a stressful year for many, so some members have a goal to take more time to relax, and not to stress over so many things in life.	<i>This year has been totally chaotic and I want to be better next year about taking time to de-stress and relax. Also, I know it sounds nice, but I want part of my focus on overall well-being to include a focus on losing some weight. I am a marathoner, so fitness is not a problem. I just eat too much! I think this is a very attainable goal given my lifestyle.</i> Jag95, 29
Save Money Or Be More Responsible With Finances: Saving money is the primary financial goal shared by members.	<i>My New Year's Resolution for 2011 is to get the credit cards paid off. The plan is to turn off the card at the end of this year and use the extra money to focus on paying down that revolving debt. I'm also going to do things like limit my personal splurges on books and debt to help this along. I've got Netflix and a library card and they need more exercise.</i> Sivics, 33
Exercise/lose Weight: Many members cite this as the "standard" New Year's resolution. This includes exercising, changing eating habits, and leading a generally healthier lifestyle.	<i>I have been putting on weight since I had radiation treatments for my cancer. Since the initial surprise, I followed up mostly to absorb all of the comfort foods that I wanted, and now I am shocked at how large and lethargic I have become. With some reservations, I will likely register to do a low carb diet that brings the use that maintained my weight best, and allowed me to enjoy the foods that I always love - meats and cheeses. Because of a problem diagnosed the weight I have on right now is causing me difficulty breathing. I will feel much better after that.</i> Russ3222, 60

FIELD TIMING: Dec 14 - Dec 21
NEW TOPICS STARTED: 42
TOTAL POSTS: 328
UNIQUE POSTERS: 66

Do shoppers find the new login layer interface easier to use?

The short answer... Yes! In fact, more than half of shoppers like the interface better than current one. Shoppers like the simplicity and clean look of the interface; it's not as distracting or burdensome.

Recommendations

1. Include the reasoning behind having to login, whether its for leaving a review or making a purchase.
2. Consider the possibility of creating two different login layer interfaces; one for shoppers who already have an account which will only ask them to login and one for new shoppers who don't have an account which will ask them to create one. Shoppers with accounts feel somewhat trivialized when they're questioned about creating one.

Insights and Implications

The majority of shoppers like how easy and simple the login layer interface is

Some shoppers aren't sure why they need to login for purposes other than shopping

Shoppers like being able to stay on the same page; they don't like getting redirected

As long as the login process is as quick and easy as possible, shoppers are less likely to abandon what they're doing and continue on the site.

There is a risk of confusing shoppers if they aren't reminded why they are being asked to login; communication is key.

The login layer interface has a lot of positive potential as it is seen as less of a distraction; shoppers don't have to worry about losing their page.

Voice of Customer Highlights

LOGIN LAYER PAGE LIKES

- Simple, clear and short look
- Easy to understand
- Like how the login box starts out on the page with the header and background
- Like how it does not navigate them away from the current page

"Love the fact that it comes up with a pop up window and doesn't take me to a whole new page that I have to wait for to load and then go back to the page I was on."

LOGIN LAYER PAGE DISLIKES

- Does not take the purpose of login + content and boring
- The dark background isn't appealing
- Don't like how there is an option for creating an account

"I have an account... I would like it better if it didn't ask me if I would like to create and account"

The Fine Print

Background

Needs to find out if customers find this interface for logging in easier to use; need to make the login process as unobtrusive and easy as possible for the customer. Client is hoping to use this login layer interface for all login functionality.

Details

Source: x
Fielded: x
Total Sample: x
Response Rate: x

About Firefly Surveys

Powered by Vision Critical, Firefly Surveys is a robust suite of web-based ad hoc market research tools that combines market leading online survey tools with innovative discussion forum capabilities.

About Vision Critical®

Vision Critical is a global research and technology firm that creates software and services solutions for over 600 clients, including one third of the world's top 100 brands. The company has offices across North America, Europe and Australia as well as a Global Partner Program that provides other research companies and consultants with access to top-of-the-line technology. Its Sparq™ product is the most widely adopted community panel platform on the planet.

FIND OUT MORE

www.fireflysurveys.com

www.visioncritical.com

sales@fireflysurveys.com

North America: 1 888 543 1086

UK: +44 (0) 20 7065 7271

Australia: +61 2 9256 2000