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**FOCUS GROUP**

- **Keys to a successful focus group**
  - Preparation
  - Facilitation
  - Process
  - Participants
  - Notification to Managers
  - Follow-up after the group has disbanded
  
- **Identify the reason for the Focus Group**
  - For example: To supplement results of change readiness assessment and to obtain reliable, representative information as opposed to making assumptions about results
  
- **Create a statement of purpose for the group**
  - This will help you identify who should participate
    - For example: To better define the types of rewards and recognition that are important to Support, Professional, Field Sales and Management associates.”
  - Main purpose is to get ideas as well as priority of ideas.
  
- **Select Participants**
  - Representative group
    - Minimum of 8 and maximum of 12
    - Separate groups of Support, Professional and Management associates
    - Various years of service
  - Voluntary participation
  - Invite participants with copies to their managers. Invitation should have purpose, time, location, role, etc.
  
- **Facilitation – Key role**
  - Designs key questions
  - Invites and limits input to ensure varying points of view are expressed
  - Invites participation in a non-threatening manner
  - Has names displayed for ease of interaction
  - Call on one or two participants who will speak up
  - Ensures group operates within its purpose and that guidelines for discussion are followed.
  - Remains objective – refuses to give opinions or steer group in any way
  - Asks good, thought provoking questions
  - Sensitivity to participants/paraphrases/repeats specific comments or themes

- Records comments
- Is careful to avoid promises that every idea will be adopted.

- **Pework**
  - List the guidelines that apply to everyone in the group in a page to hang in the room
    - Facilitator is neutral
    - Everyone participates and honesty is critical
    - All ideas are welcome – no judging
    - Confidentiality
  - Obtain flip charts and markers (3M charts preferred if sticking items to wall)
  - Obtains colored dots to prioritize
  - Make name cards
  - Identifies the group activity and gets materials if necessary
- **Session**
  - Discuss purpose
  - Opening Activity/get to know each other activity
  - Review guidelines of group
  - Reviews process with group
    - Series of questions to be answered by the group
    - Group will brainstorm on ideas/solutions/issues/Needs (etc.)
    - Ideas will be written on the flip charts
    - After each question is complete, the group will vote on the top X number that they believe are the most critical to address.
- **Voting**
  - The voting will take place by using a series of dots. Each member will be provided with X number of dots per question. They can use their dots to vote for a few things, or spread them out amongst many. There is no minimum or maximum amount of dots they can use for each idea within their dot pool.
  - The voting will determine the ranked importance
  - The final lists will be put into categories of importance to the team
  - There are no promises that every issue, concern, suggestion, etc. will be addressed; however, all results will be presented to senior management for review.
  - Summarize findings with team
  - Show appreciation for their attendance and honesty
- **Post-session**
  - Summarize findings/themes, etc. in to an executive review format
  - Recommend courses of action based on findings
  - Forward materials to senior management
  - Send a follow-up note to Focus Group participants informing them of the next steps to ensure their time was well spent. Does not have to be specific – can be vague, such as “We have sent your suggestions to the Executive Management Committee. They are reviewing the ideas and formulating appropriate next steps. Thank you for your honest and open commitment to helping us to integrate these changes in the workplace.”
  - Build Action Plans with owners, deliverable and timelines for each selected item from the Focus Group results.
  - Follow up on action plans.