Fail Again, Fail Better
Lessons from the life of a qualitative innovator

Peter Totman
Copyright

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system of any nature, or transmitted or made available in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written permission of ESOMAR. ESOMAR will pursue copyright infringements.

In spite of careful preparation and editing, this publication may contain errors and imperfections. Authors, editors and ESOMAR do not accept any responsibility for the consequences that may arise as a result thereof. The views expressed by the authors in this publication do not necessarily represent the views of ESOMAR.

By the mere offering of any material to ESOMAR in order to be published, the author thereby guarantees:

- that the author - in line with the ICC/ESOMAR International Code of Marketing and Social Research– has obtained permission from clients and/ or third parties to present and publish the information contained in the material offered to ESOMAR;

- that the material offered to ESOMAR does not infringe on any right of any third party; and

- that the author shall defend ESOMAR and hold ESOMAR harmless from any claim of any third party based upon the publication by ESOMAR of the offered material.

Published by ESOMAR, Amsterdam,
The Netherlands
Edited by: Deborah S. Fellows
ESOMAR is the global voice of the data research and insights community, representing a network of 35,000 data professionals.

With more than 4,900 members from over 130 countries, ESOMAR’s aim is to promote the value of market and opinion research in illuminating real issues and bringing about effective decision-making.

To facilitate this ongoing dialogue, ESOMAR creates and manages a comprehensive programme of industry specific and thematic events, publications and communications, as well as actively advocating self-regulation and the worldwide code of practice.

ESOMAR was founded in 1948.

About ESOMAR Membership

ESOMAR is open to everyone, all over the world, who believes that high quality research improves the way businesses make decisions. Our members are active in a wide range of industries and come from a variety of professional backgrounds, including research, marketing, advertising and media.

Membership benefits include the right to be listed in the ESOMAR Directories of Research Organisations and to use the ESOMAR Membership mark, plus access to a range of publications (either free of charge or with discount) and registration to all standard events, including the Annual Congress, at preferential Members’ rates.

Members have the opportunity to attend and speak at conferences or take part in workshops. At all events the emphasis is on exchanging ideas, learning about latest developments and best practice and networking with other professionals in marketing, advertising and research. Congress is our flagship event, attracting over 1,000 people, with a full programme of original papers and keynote speakers, plus a highly successful trade exhibition. Full details on latest membership are available online at www.esomar.org.

Contact us

ESOMAR

ESOMAR Office:
Atlas Arena, Azië Gebouw
Hoogoorddreef 5
1101 BA Amsterdam
The Netherlands
Tel.: +31 20 589 7800

Email: customerservice@esomar.org
Website: www.esomar.org
Fail Again, Fail Better
Lessons from the life of a qualitative innovator

Peter Totman

Setting the scene

Purpose of the paper
Using a Samuel Beckett quotation in the title perhaps sets expectations too high, but this paper has lofty aims – no less than to challenge our attitudes to failure and reframe our experience of it.

The following pages share the positive role failure has played within my life – to explore failure within a single career. A number of anecdotes will be shared, which demonstrate that failure should not be seen as something to simply ‘get through’ and survive - it can bring rewards that shallow success never can!

It is an important subject. There is a relationship between a fear of failure and our willingness to take risks. As qualitative researchers, we need to manage our understandable fear of failure if we are to maintain our famed innovative edge. Yes, failure will undoubtedly always hurt, but, if approached in the right way, it can bring significant personal and professional development. This is the case this paper seeks to build.

This is a very personal account, but, hopefully one that resonates to a wide range of qualitative researchers and clients. It is reflective in tone but aims to have a practical purpose. I hope reading it is to some degree therapeutic too, as writing it certainly has been.

The psychological and cultural perspectives failure – a brief discussion
It is worth dwelling a little on the word ‘fail’. The dictionary defines it simply as a “lack of success” but talking around the office it is clear that the noun ‘failure’ (especially when used to refer to a person) has much more negative connotations and much more salient presence ‘Being a failure’ feels like a final judgement of one’s worth. The danger is we slip too easily in our minds from one to the other - by failing we become, we feel, like a failure.

If ‘failure’ is a powerful word, then ‘public failure’ is even much more so. Close your eyes and think about ‘public failure’. What do you see? I see myself as a young boy, naked and surrounded by a laughing mob. Maybe that is just me but I suspect we all associate failure with deep pain and humiliation. (The scene described never happened by the way…not yet).

Fear of failure is understandable and perhaps wise. However, a sense of proportion is required. The fear should not dominate our life or prevent us living, experimenting and flourishing.

We also know that the risk of failure is a part of life. Indeed its positive role in achievement is recognised in our culture, and we are urged to accept, even embrace failure. Try googling ‘quotes about failure’ and you will be richly rewarded with words of infinite and diverse wisdom. From Churchill to Einstein, it seems every famous achiever believes in the positive power of failure. Here are a couple of my favourite quotations which express this:

“Failures are finger posts on the road to achievement.” (C.S. Lewis)

“Winners are not afraid of losing. But losers are. Failure is part of the process of success. People who avoid failure also avoid success.” (Robert T. Kiyosaki)

My favourite of all is:

“Failure should be our teacher, not our undertaker. Failure is delay, not defeat. It is a temporary detour, not a dead end. Failure is something we can avoid only by saying nothing, doing nothing, and being nothing.” (Denis Waitley)
It is easy to be glib of course. Failure is not always glorious or constructive – you probably don’t want your surgeon or your airline to innovate on the job. But failure has a positive role in creative or innovation-based professions. Risk is essential to both creativity and innovation. Only by taking leaps are leaps made. Qualitative research is certainly an innovative profession. Let’s explore this further.

**Qualitative research as an innovative profession**

Qualitative research prides itself on its innovation. It claims to innovate in terms of research design, applying new thinking and approaches to analysis. A review of qualitative conference themes from the last few years reflects this – ‘The Shock of the New’ and ‘Qualitative Revolution’ are recent examples of conference themes. Innovation is in our DNA. We talk an awful lot about it but it also something we actually practice.

Arguably this is most marked at the design stage. Innovative methodologies win proposals. Anecdotal evidence suggests client decision-makers rate innovation up there with cost and relevant experience as a fundamental criterion of selection. Qualitative people seem to be naturally innovative – but we are incentivised to be so by clients and the competitive tender process.

Yet there is a tension at the heart of our profession that goes largely unacknowledged. Qualitative research employs methodologies that emerged and adapted from the social sciences and academic and therapeutic psychology. Groups discussions, depth interviews, ethnography were not invented to win proposals but to ensure optimal conditions for insights to emerge. The scope for innovation in methodology at least needs to be balanced against what has proven to be effective and, indeed ethical. We do not have a free hand at the design stage – there is balance that has to be struck between creativity and honouring core principles and observing ethical standards.

**Five stories of failure**

To borrow from the quotation shared earlier, failure has proven to be my ‘greatest teacher’. The best way to show this is more than mere conference paper hyperbole – it is to illustrate it with examples. These four examples – or stories – form the basis of this paper.

They are examples taken from different stages of my career, but none are recent experiences. Not that I have stopped failing (‘innovating’!), but time and distance helps process and understand experience. The distance has helped identify and understand the lessons but has also erased some memories of the detail. In addition, some of details e.g. brand/category have been changed deliberately to protect the innocent (often the clients!) but they are all ‘true’ in essence. They are a little impressionistic in part. I hope it does not sound too ‘post-truth’ to describe the stories as portraying ‘the greater truth’.

The format of the stories is a little leaden – a description followed by a ‘lessons learned’ section – but I wanted to be as clear as possible.

As this is about a career of failure I have indicated (roughly) the age I was at the time the event took place.

**Story One: The conflict-less conflict group (age 27)**

This story must stretch back 20 or more years. It was a case of enthusiastic young researcher meeting sexy new methodology … I remember my desperation to try it out. I went around the office trying to sell the methodology to my senior colleagues. I think my passion amused them.

At last a brief came my way that looked promising. It was a project about the branding of beer. One of the objectives was to explore the brand personality. This sounded like legitimate conflict group territory. Why not get brand advocates and brand rejecters to square up in creative opposition? The client, another young idealist, was as excited by the prospect as I was. If I remember correctly, the proposal contained talk of ‘theatre’, of ‘blood sports … leading to breakthrough insight’. The expectations were therefore set high…

I seem to remember the day dawning bright and sunny, but ominously we had clouding over later in the day – but this might be the trick memory plays. I do, however, definitely recall the backroom buzzing with anticipation. But, as the session started, the painful contrast between the excited backroom and the flat front room became painfully apparent. The wretched respondents just wouldn’t play the game. The ‘advocates’ were meant to be passionate about the beer and ready to fight for its (brand) reputation. Instead they were decidedly pragmatic … they bought it out of habit or
because it wasn’t too strong or too weak. The rejecters were similarly unideological … the beer was OK but a little bland. Hadn’t these people read the proposal?

The problem was that this was a mainstream beer that no one really cared about. Instead of a gladiator spectacle we ended up with tame debate between those with a vague preference and those who were utterly neutral – Marmite this brand was not! The fireworks didn’t happen…it was an ordinary group, oversold. The clients expressed their disappointment, the younger me was crushed.

**The lessons learned**

The temptation to over promise in proposals is an understandable one. Researchers often feel they have to produce something new in order to wow the client. I have seen all sorts of funky names given to what are essentially standard group discussions. We need to remember, that whatever the personal charisma of the researcher, we are not in showbiz. People, customers and potential customers are compelling enough – if provided with the right environment to engage in authentic conversations.

There is also a narrower methodological lesson here. I returned to conflict groups after several years of ‘convalescence’ and, to cut a long story short, learned they had a place – but only in categories or brand relationships where feelings run high.

We must always place the comfort of the participants at the heart of the design…for effectiveness and ethical reasons. Human beings are more compelling than performing seals!

**Story Two: Exactly who is doing the projecting here? (age 31)**

Whatever the behavioural economists claim, projective techniques are proof that qualitative researchers knew about the unconscious and how to penetrate it way before Daniel Kahneman came along –a good qualitative researcher never did ‘ask and tell ’ research. These techniques continue to play a vital role in a wide range of projects – helping the researcher see more and see deeper. They can also be a fun part of the process for researchers, clients and participants.

They are also a potential area for creativity and innovation. The classic techniques; projective questioning, visualisation, role play and the like can be customised to the category or even to answer specific research objectives. However, as I found out about 15 years ago, certain rules of use exist – and for good reason.

We were working on a now defunct hotel brand in the mid-90s. One of the techniques my colleague came up with involved participants role-playing the imagined checking-in experience at various hotel chain brands. One participant played the receptionist and one the guest. My senior colleague on the project had great results in her sessions – from this technique we learned new things about the brand’s robotic and inauthentic style.

My turn came and participants seemed awkward and embarrassed in role play mode … understandably the client blamed me – after all the technique was so rewarding and insightful when used by colleague – and now this? I found myself hating my wooden, introverted respondent for showing me up!

**The lessons learned**

Listening back to my colleague’s groups, and comparing her handling of the techniques to mine, was revealing and made me feel a little inadequate. Hearing someone do a better job than you – and admitting it, especially to yourself is hard.

Listening back, it was clear from how I explained the task to the group that I had no faith or confidence in it. It was my colleague’s idea and I never really believed in it. Here’s a simple rule – never ask a question you don’t believe in. This is especially true for projective techniques – you need to believe and feel comfortable otherwise they’ll pick up on your awkwardness and mirror it.

It also matters how you introduce projective techniques. I went from talking about their experiences rationally and then asking them to play a game in the next sentence, from adult conversation to childish fun play without acknowledging or signalling this shift? Neither did I take action to up the energy in the room first. Sometimes I am just a crap researcher! I disown my younger self. It is vital to fully own the technique and navigate a group shift from parent to child ego state…OK, I have gone from humility to pomposity within one paragraph!
It is not hard to create the right mood for projective techniques to flourish - it is mainly about changing the tempo/lightening the mood, most easily achieved by changing your (the researcher’s) own demeanour – for example just getting out of your chair and sitting on the floor (kindergarten school teacher style) and saying (as if you mean it) “We are now going to have a bit of fun”.

**Story Three: The myth of the ‘good’ group and the ‘bad’ group (age 35)**

Viewed groups are part of our life, for good or ill. The presence of the client in the backroom has increased the pressure. We all desire the ‘good group’ and our talents recognised by our clients.

Flash back 15 or so years and I was making my way to the facility. It was a summer night (again) and people were sitting outside the pubs drinking beer. I passed by stoically - as I had a different destiny - not for me the superficial pleasures of alfresco frolic. I got to the facility and went down the stairs into the basement, bright with artificial light.

I was nervous, as important clients were sitting in the backroom - exuding gravitas. The first group unfolded like the dream group – big characters and strong opinions, happy to volunteer and play. I could hear the backroom laughing and partying, high on the energy.

At half time I was careful to play it modest – ‘the group moderated itself’ I claimed but the delighted clients were not having any of it – and congratulations flowed like Prosecco.

The next group was in sharp contrast. I spotted the signals as participants shuffled in. Low energy, clearly wanting to be elsewhere – probably enjoying the warm London evening. My energy boosting techniques were ineffective. At the end of the groups I went next door to get questions – the room was empty – the clients had left 30 minutes into the session apparently. I couldn’t really blame them.

I only had time to listen back to one of the groups before the interim top line – pretty obvious which one I would choose. My head was buzzing with preliminary hypotheses as I sat down to listen and analyse. But hold on a second! The group was loud and energetic as I remembered but completely lacking in insight or richness. A little concerned, I decided I had to listen back to the second group too – I was desperate for inspiration. A second surprise awaited me. It was much quieter and unarguably low energy but there was so much there - rich meaning discernible between the quiet, faltering sentences, in the intonation and tone of voice, and even in the things they did not say. Even the prolonged, uncomfortable silences were could be interpreted. It was that ‘dull’ second group that contained all the insight.

**The lessons learned**

I think the viewed group has somewhat warped our sense of what a good group is. A group should surely be judged primarily in what we learn from it, not its entertainment value, for us or the backroom audience. The second group felt like a failure because the back room was empty.

It is also tempting to forget where our focus should be. We need to be in the front room in the frame of reference of the group, not second guessing the feelings of the audience. We owe that focus to our participants but also our clients.

Lastly, I believe insights do not just come from what participants say – but the feelings evoked in the mood and undercurrents picked up by the moderator. I think you have to be in the room interacting to register these. This is more controversial territory but supported by much psycho-analytical theory.

**Story Four: Confronting methodological prejudice (age 45)**

As I became more experienced, I began to develop my own qualitative philosophy. Very much the proud, ‘old school’ quallie, I was sceptical about all these new-fangled, modern developments. I was very sniffy about video content and argued for the poetic power of verbatim on the page. I believed (and still do) in the centrality and power of the qualitative relationship between researcher and participant, that is the cornerstone of what we do. We meet, we talk and we invest in a relationship that allows for the emergence of insight and facilitates interpretative leaps.

Six or so years ago I worked on a project about debt – very much as supporting researcher to one of my colleagues. Video selfies were used as part of the methodology. Participants were asked to record their feelings about their financial struggles on their phones and submit as pre-task. I argued strongly against what I thought would be a waste of money and energy. I instead argued for a reflective journal where the participant recorded their feelings in writing, several times as day. I was overruled. Thankfully.
I was amazed by some of the selfie content. Genuinely moving material where people revealed their innermost feelings in a direct and intimate manner. Not only were the selfies insightful and great presentation fodder, they were also useful stimulus in the subsequent interviews … allowing the researcher to probe and question around the feelings expressed and to dig even deeper.

As I admitted my error, my colleague was merciless in my defeat. It was great to see the precious and self-styled qual purist taken down a few pegs.

The lessons learned
I remain a little sceptical about our growing reliance on video. I think it can encourage a soundbite culture and endanger the analytical process. But it has a role. I am a great supporter of the video selfie as an additional layer of insight. There is something powerfully confessional about a person speaking, alone to camera and the richness of creative rambling that can go off into fascinating and unforeseen tangents.

But the ‘lesson’ of this story goes beyond the merits of a particular pre-task.

We need to be open to the new, even if it makes us uncomfortable. An open and non-defensive approach to younger researchers and their ideas is vital for the development of our craft. If fossils like me define the discipline, it will cease to grow and cease to resonate. It too will fossilize.

It is also very easy to fall into the trap of defining qualitative research by our own personal strengths and weaknesses. I am not very technical - in fact I am inept technically – and I must be careful not to turn my nose up at new technologies and their potential contribution simply because of this.

Story Five: Be as brave as your client (age 48)
Four years ago we were writing a proposal about how baby boomers were approaching and experiencing retirement. I thought it would be interesting to get an already retired couple to advise a younger couple on the cusp of retirement about how to get the best out of retirement and how to navigate the pitfalls. It was one methodological piece of a multi-layered design. We called these ‘mentor mentee sessions’ - like you do.

The project was won. It was a large US project of considerable importance. The backroom would be full of senior US executives.

My direct client, who worked for the ad agency that was managing the research process, was a good friend of mine. Given the pressure on the project I lost a bit of confidence in the ‘Mentor Mentee’ element and suggested we ‘lose’ this relatively small part of the methodology. My concern was how to effectively moderate the couple pairs in their interactions – it was not traditional moderation – it was not classical qualitative research. Who knew how it would come across to those senior execs! ‘Let’s lose it’ and avoid the risk I urged. She wouldn’t hear of it – she saw it as a vital component part. She could live with the uncertainty – she had faith.

My failure here was to chicken out! The methodology worked really well … and the dynamic between the older couple warning about the perils of retirement brought a different tone to the project. They talked openly that the pressures 24/7 togetherness put on their relationship and the need to remake their relationship and rediscover each other in new ways.

The lessons learned
Simple, don’t bottle it! We should continue to design new approaches that tinker, even redraw traditional methodologies. Our debt to our academic roots should not make us overly respectful or blunt our creative edge. Of course there are elements of our craft which are non-negotiable – for example participant wellbeing and comfort – and the importance of analysis, but beyond these basics (which are, in any case, often ethical) we should be brave.

There is a lesson here too about client relationships. Our clients are partners in the process and any experimentation should be undertaken in an informed way. Risks should not be imposed on clients or their projects without full disclosure.

Lastly, it is worth noting that the arena of the viewing facility can simultaneously foster risk-aversion at same time as pressurizing us into producing entertaining spectacle, pushing us in the direction of low brow comedy! It might not be worth trying the most radical new methodology in front of a senior audience but, then again, if the client understands
the risks and shares them with you, why not match their bravery? All you can lose is your livelihood and self-respect after all.

**Overall themes emerging and points of discussion**

A number of common themes emerge from these anecdotes. What I have termed ‘lessons’ are to other researchers discussion points of course. After all these failures, do you think I have not learned a little humility? Three key discussion areas emerge:

**Where is the line drawn between classic theory and innovation?**

Innovation needs to be balanced against certain core principles. The wellbeing and comfort of the participant should be central. This might be an ethical given but it also relates to effectiveness – if people are uncomfortable or uncertain of their role, they will not open up – no matter how brilliant and creative the innovation.

However, one should not risk being too absolutist. To some degree, these core principles can only be uncovered through experimentation. It is about balance, but as an innovative profession I would urge to err on the side of experimentation.

**How has the viewing facility impacted research practice?**

I believe the advent of the viewing facility has profoundly changed research in the UK over the last 25 years or so (the span of my career). In the ‘old days’ most research (in UK anyway) was conducted in real homes and unobserved by client, allowing the researcher to wholly focus on the participants, fully immersing themselves in their frame of reference.

The switch to the viewing facility has had real positives. It has allowed clients to see their customer ‘live’ and to become more actively engaged with research projects, as genuine partners. However, there is a rarely discussed downside. The presence of an audience creates a pressure on researchers to produce ‘theatre’. We are merely human after all and we want our clients and their internal clients to feel engaged and (yes) even entertained. The danger is then that the moderator focus is split between the front and the back room, and/or we become more interested in making it ‘lively’ for observers, than authentic or comfortable for participants. The pressure is there and real - and as researchers we need to acknowledge it and then actively resist it, ensuring we ‘stay’ with our participants.

I suspect the typical group discussion of 30 years ago is quite different from the typical ‘modern’ version as a result of this pressure – more tasks and games, less listening and more flip boards. It may have also impacted the content of proposals and client decisions about what proposals should prevail. A new criterion has emerged – ‘What project design would make for the most engaging theatre for people in the backroom?’

This ‘cultural change’ is seldom acknowledged or explored. It would actually be a be a worthy subject for a conference paper. (watch this space!) Researchers and clients need to work together to ensure the needs and feelings of the participants are prioritised. Good theatre may be good research but it is not the definition of it - and it can have a negative effect. Talking of clients…

**How should client and researcher work together to ensure appropriate levels of innovation?**

The role of the client relationship in determining the correct risk/innovation balance cannot be over-estimated. Clients and their agencies are partners in the research and innovation process. A good client will allow innovation but not place it above the fundamental requirements of the brand, internal stakeholders – or even the participants/clients. A true partnership will see a client sometimes urge bravery but at other times caution. A good relationship between researcher and client will be one in which topics like ‘failure’ and risk can be openly discussed. Clients should resist the temptation to over index innovation within the proposal process. Innovation to drive insight is one thing – innovation simply to win a proposal is another. A good researcher should be able to say – ‘for this project no innovation is necessary - standard groups sensitively moderated and imaginatively analysed are the best way to answer the research objectives’. Obviously not in these exact words!

Agencies should self-fund the most experimental of innovations and not expect clients to take these sort of risks on ‘live’ projects; even better, clients and agencies should co-fund studies from which both will benefit.
Conclusions and stirring words

Psychologist Michael Schreiner makes a useful point about failure:

“The faulty thinking pattern is equating failure in an isolated area of life with global failure, it’s believing that failing at a specific endeavour means that you are a failure as a person. This is not a rational belief, it’s not usually even a conscious belief, but it is a controlling belief”.

Failure is a necessary part of an ambitious qualitative career. I offer up my failures here for your own enjoyment but also your edification. My career of failure has allowed me to develop my own qualitative philosophy – and, as an added bonus, has ensured my tendency to pomposity is kept in check. For this my colleagues are very grateful. However, I need to make sure this, grandly-titled philosophy, is not a sacred text, but open to constant revision and refinement.

So, qualitative researchers must innovate and risk failing. But they do not risk becoming a failure this way, quite the reverse. Only through failing do we get to real insights about our craft and about ourselves. Seriously, I mean it.

I have talked about my career in the past tense throughout. I should add her that there is plenty more of it to go – many new and instructive failures await me.

So lastly then, I urge you all, go out and fail. “Fail again and fail better”.

The Author

Peter Totman is Head of Qualitative, Jigsaw Research, United Kingdom