
CarZen Focus Groups

Moderator's Guide

Focus Groups in Boston: March 11-13

Location: 10 St. James, 4th Floor, UX Lab, Boston

Prepared by:

Robert L. (Bob) Thomas

Director, User Experience

WHAT'S COMMON AMONG EACH FOCUS GROUP

- Has a current automobile policy and is the insurance decision maker **(8 of 8 participants for Focus Groups 1 and 3; 5-8 participants for Focus Group 2)**
- Must be an automobile policy owner. (Ask who their policy is with and record it.) Recruit some participants who have multiple vehicles on their policy **(8 of 8 participants for Focus Groups 1 and 3; 5-8 participants for Focus Group 2)**
- EITHER:
 - Must have an **iPhone or Android phone** and be comfortable using it to visit mobile sites and using mobile apps. Uses the iPhone or Android phone multiple times per day to do more than talking, texting, and reading e-mail
 - Must have an **iPad or Android tablet** and be comfortable using it to visit sites and using apps. Uses the iPad or Android tablet multiple times per day to do more than reading e-mail
- High school graduate or higher
- Household income: \$55,000+
- Gender and Ethnicity: recruit a mix
- Doesn't reject our company

WHAT'S DIFFERENT ABOUT EACH FOCUS GROUP

- Group 1 = Buyers (have bought a new or used car within the last year). No customers of our company. Mix of ages, 24-49
- Group 2 = Current Researchers (are now researching purchase of a new or used car). customers of our company. Mix of ages, 24-49
- Group 3 = Future Researchers (will be researching purchase of a new or used car within the next 6 months). Current customers only. Mix of ages, 24-49

FOCUS GROUP DATES: Wednesday-Friday, March 11-13

PARTICIPANTS: 30 (Three groups of 8 participants, plus 2 alternates per session)

DESIGN: A total of three, 2-hour, focus group sessions

INCENTIVES: \$250 in compensation per participant, and \$150 per alternate

Testing Schedule (24 Slots, Recruit 30 Participants)

Date: Wednesday, March 11	8 Participants + 2 Alternates	Time: 10:15 a.m. - 12:30 p.m.
FOCUS GROUP 1		Moderator: Bob
Buyers (have bought a new or used car within the last year). No current customers. Mix of ages, 24-49		Notetaker in room: Hannah Notetakers in DX Scrum: Robin & Mike

Notetakers in DX Scrum: they are responsible for

- (1) Escorting participants from the security desk at 10 St. James to the participant room and to the bathrooms.
- (2) Ensuring that participants sign the consent form.
- (3) Pay any alternates \$150 and have them sign the cash receipts just as the focus group begins.
- (3) If the phone rings in the focus group room after the focus group has started, the moderator will not be answering the phone. A notetaker in the DX Scrum will go down to security and deliver \$25 to the participants. If there are any issues with the compensation, then the notetaker should ask the participant to contact Ellen Finn, who will contact us to resolve.
- (4) Notetakers in the DX Scrum escort participants to the restroom during the break.

Moderator:

- (1) Ensures that participants write their first name on the tent cards.
- (2) During the break, leads participants to the participant room.
- (3) Gives participants the compensation and has everyone sign the cash receipt at the end of the session.

Notetaker in Room and Moderator:

- (1) At the end of the session, escort participants to the restroom or the elevator on the 4th floor.

Date: Thursday, March 12	8 Participants + 2 Alternates	Time: 1:45 p.m. - 4:00 p.m.
FOCUS GROUP 2		Moderator: Robin
Current Researchers (are now researching purchase of a new or used car). No current customers. Mix of ages, 24-49		Notetaker in room: Bob Notetakers in DX Scrum: Hannah & Mike

Date: Friday, March 13	8 Participants + 2 Alternates	Time: 10:15 a.m. - 12:30 p.m.
FOCUS GROUP 3		Moderator: Mike or Bob
Future Researchers (will be researching purchase of a new or used car within the next 6 months). Current customers only. Mix of ages, 24-49		Notetaker in room: Mike or Bob Remote notetaker: Robin Notetaker in DX Scrum: Hannah

*** NOTE 1: All participants MUST arrive 15 minutes before the focus group starts, to get settled and sign consent agreements. Participants who arrive after the focus group starts will not be admitted and will not receive the honorarium.**

*** NOTE 2: Parking is NOT included in the \$250 honorarium. Please encourage participants to park in a nearby garage. The last thing we want is participants arriving late or wanting to leave early because they're driving around looking for meters, which they need to keep feeding.**

CarZen FOCUS GROUP OBJECTIVES

- **Determine, prioritize, and map out the key steps in the car shopping journey**
- **Ultimate goal: provide a customer journey map as the result of our usability focus groups**
- Discover consumers' mental models for understanding car shopping, the research process, and becoming educated about cars
- Find out what creates a good car shopping experience and gives users confidence in helping them achieve their needs and goals
- Understand why consumers want to shop for a car and what they are trying to achieve
- Understand the emotional components of shopping for and purchasing a car
- Discover how consumers think about different areas of car shopping research and where they'd go to seek out this information
- Find out how consumers want to see car shopping material classified and categorized
- **Discovery: uncover some new tools and features that car shoppers want but we may have not considered**

CarZen FOCUS GROUP PLAN

1. Introduction and
2. Rules of the Focus Group (5 minutes)
3. Collage Review (40 minutes)
4. SCENARIO. (20 Minutes)
 - a. BUYERS: Let's go back to that time when you first thought about buying a car. Say you have a car with 160,000 miles on it, and you know you'll have to replace it soon. What's the first thing you do? Think about?
 - b. CURRENT RESEARCHERS: Say you have a car with 160,000 miles on it, and you know you'll have to replace it soon. What's the first thing you do? Think about?
 - c. FUTURE RESEARCHERS: Let's say you're thinking it's time to buy a car. Maybe you have a car with 160,000 miles on it, and you know you'll have to replace it soon. What's the first thing you do? Think about?
 - Why do you need a new/used/pre-owned car? What are the considerations?
5. BREAK (10 minutes)
6. CO-CREATION EXERCISE, GROUP CARD SORT (break into 2-3 teams):

Put together an **IDEAL** journey for us on steps you would take when researching and shopping for a new/used car (30 minutes)

Each group presents their co-creation, followed by a discussion among all participants
7. Vote with Your Dollars Exercise (15 minutes)

RANK FEATURES IN ORDER OF IMPORTANCE when shopping for a car

Followed by Discussion
8. OPTIONAL: Questionnaire (5 minutes)
9. Conclusion (2 minutes)

1. Introduction

(5 Minutes)

*Orient participants to restrooms and water fountains, offer snacks/drink.
Then follow the script below.*

Hi everyone. Welcome to the focus group session. Thank you for coming in today. My name is _____ and I will be leading the discussion. This is my colleague _____, who will be taking notes for us.

We're running today's group discussion to learn more about your needs around car research and car shopping. This group is an important step in our research initiative aimed at improving the ways that people like yourself want to shop for cars. We've scheduled this group to last 2 hours so we can explore this research initiative and make sure you all have an opportunity to give us feedback.

Outside, you read and signed a consent form. It mentioned that we will be videotaping this group for members of the study team who could not be here. Does anyone have any questions about the form before we get started?

For our discussion today, we'll have you talk through some scenarios and participate in activities. Our discussion and activities are not intended to be in any way stressful. Should you feel at all uncomfortable, let me know and we'll stop the discussion.

I encourage you to express your opinions as honestly as possible. Please respect each other's opinions and remain quiet while others are speaking. However, due to the nature of the topic we are discussing, we also encourage constructive debates. We do not expect everyone to hold the same opinion.

I will do my best to engage everyone in conversation. However, due to the time limits, I may have to move on to another scenario or discussion question in the interest of time.

<GO OVER FOCUS GROUP DISCUSSION RULES>

~~Before we begin, let's go around the room and introduce ourselves. Please tell us your first name, and also tell us about your current car and your dream car.~~

~~(Go around the room and let everyone introduce themselves)~~

Great thanks. Welcome everyone. Any questions before we begin?

2. RULES OF OUR FOCUS GROUP

1. We want everyone to express your opinions honestly
2. Respect each other's opinions
3. Remain quiet / listen while other people are speaking
4. Encourage constructive debates
5. No idea is stupid

Homework: Collage Assignment

BACKGROUND: Homework Assignment

We would like to give you a homework assignment: create a collage and bring it in with you. Note that you will be presenting this collage at the beginning of the focus groups. This homework is required to participate in the focus group.

THEME OF THE COLLAGE

Think about your experience when researching and shopping for a car. How did it make you feel when you started? Midway through? When you finished?

-or-

Think about what the experience will be like when researching and shopping for a car. How do you think it will make you feel when you start? Midway through? When you finish?

APPROACH

In creating your collage, think of why you want(ed) or need(ed) to buy a car and what you are trying(trying) to achieve. Think of your goals and objectives in shopping for a car. Think what images and emotions come to mind.

Please use 4-8 items in your collage. Glue them down or affix them to the page. The collage can be approximately 8 ½" x 11" and can include pictures and text from newspapers, magazines, the Internet, and the like. Please refrain from using any offensive content.

3. Collage Review (40 Minutes)

Ask each participant to review their collage homework, **STANDING OR SITTING NEAR THE FAR WALL, SO EVERYONE CAN SEE THEIR COLLAGE.**

Have a shout-it-out exercise after each participant speaks: focus group members shout out what aspect of the collage resonated with them. Note taker writes these down on the white pad.

NOTETAKER: Draw a line down the middle of the white pad. On the left side, write down the emotions that the storyteller (P) mentions when talking about their collage. On the right side, write down those aspects of the collage or story that resonate with the other Ps.

NOTES (for moderator only; not for the white pad)

	Journey, Part 1: Images, Emotions	Journey, Part 2: Images, Emotions	Journey, Part 3: Images, Emotions	Journey, Part 4: Images, Emotions	Journey, Part 5: Images, Emotions
P1					
P2					
P3					
P4					
P5					
P6					
P7					
P8					

4. SCENARIO: Focus Group 1 - Buyers (20 Minutes)

Let's go back to that time when you first thought about buying a car. Say you have a car with 160,000 miles on it, and you know you'll have to replace it soon. What's the first thing you do? Think about?

- Why do you need a new/used/pre-owned car? What are the considerations?

(1) What's the first thing you do? Think about?

(For example: get recommendations from friends/family; research online; buy a magazine like consumer reports; review your finances; take a car out for a test drive)

Note taker writes down comments from group on a white pad

Think about?	Do?

(2) What did you do next?

(For example: get recommendations from friends/family; research online; buy a magazine like consumer reports; review your finances; take a car out for a test drive)

Note taker writes down comments from group on a white pad

Think about?	Do?

(3) Think about when you were shopping for a new or used car. What FEATURES were most important to you?

(For example, price, payment, safety, gas mileage, performance, consumers ratings, age of car, trade-in value of current car, car manufacturer)

Note taker writes down comments from group on a white pad

FEATURES	COMMENTS

- How detailed do you get when searching for a car? Do you like the number of choices or find them overwhelming?
- **How do you know what features are right for your needs?**
- What could help you feel more confident about your choice of car?
- How do you use the information you gather when you go to purchase? What do you bring with you?

(4) Which step of the car shopping process do you struggle the most with, or anticipate struggling the most with?

(5) What step of the car shopping process are you least confident with?

(6) What step of the car shopping process are you most confident with?

(7) At what points in the car shopping process do you reach out for help? What type of help do you seek out?

5. BREAK (10 MINUTES)

6. CO-CREATION EXERCISE, GROUP CARD SORT (break into 2-3 teams): Put together an **IDEAL** journey for us on steps you would take when researching and shopping for a new/used/pre-owned car (30 minutes)

MODERATOR: Assign teams. 2 groups of three people, and 1 group of 2 people
Give each group a mat board, post-it notes, and pens
Have teams put together an ideal journey on steps they would take when researching and shopping for a new/used car

Each group presents their co-creation, followed by a discussion among all participants

15 minutes for co-creation, followed by 15 minutes of presentation

Each group, please select a spokesperson. But no discussion until every group has finished presenting.

7. Rank Features in Order of Importance (Vote with your Dollars exercise) (15 minutes)

Now I'd like to mix things up a little. We have some funny money to hand out (hand out money). Everyone is going to get \$10 in funny money.

We want to find out what features are most important to you when it comes to shopping for a car. We'd like you to vote with your dollars on these features that are most important to you in your car research and shopping experience:

1. Safety
2. Fuel efficiency
3. Horsepower
4. Performance
5. **Price of vehicle**
6. **Financing options**
7. Color of vehicle
8. Manufacturer
9. Consumers' ratings
10. Insurance for the vehicle
11. Age of the car
12. Trade-in value of current car

IF HAVE TIME, ASK Ps if there are any other features they think are important. If so, make other envelopes.

THE ONLY RULE, DON'T PUT MORE THAN \$5 IN ANY ONE ENVELOPE. (ASK NOTE TAKER TO WRITE RULE ON THE WHITE PAD)

You are now going to decide which of these features make the final cut. I'm going to give you five minutes (more if we need it) to put your money in the envelopes labeled with the features you think are most important when it comes to creating a good car shopping experience. You can put more than one bill in an envelope, or you could choose not to put any at all. It's all up to you. **At the end of the five minutes, I'm going to ask some questions about how you voted**

8. (Optional) Questionnaire (5 minutes)(is this a pre or post questionnaire? This is TBD)

1. Rank the following from least to most important in terms of sources and resources that aid you when it comes to car shopping:
 - a. Advice from family and friends
 - b. Research in magazines like Consumer Reports
 - c. Online websites like AutoTrader.com, Cars.com, Edmunds.com and Kelly Blue Book (kbb.com)
 - d. Online car listing sites like eBay and Craigslist
 - e. Classified ads in print newspapers and magazines
 - f. Car manufacturer sites like Mini Cooper, Subaru, Ford, etc.
 - g. Television
 - h. Other sources Please specify: _____

2. How likely or unlikely would you be to **go online to get assistance with your car shopping?**
Please circle a number from 1-7. (1 = Not At All Likely to 7 = Very Likely)

NOT AT ALL LIKELY							VERY LIKELY
1	2	3	4	5	6	7	

FOLLOW-UP QUESTIONS

- Why would they want to do it?
 - Comfort level
 - Concerns
 - How much time would the customers be willing to spend time to do it?
3. What steps do you take, or would you take, when shopping for a new or used car? (open ended)
 4. What are the most important factors to you in deciding to purchase a new or used car? (rank order)
 - a. Take same features from "Rank Features in Order of Importance"
 5. **Which step of the car shopping process do you struggle the most with, or anticipate struggling the most with?**
 6. **What step of the car shopping process are you least confident with?**

7. What step of the car shopping process are you most confident with?

8. At what points in the car shopping process do you reach out for help? What type of help do you seek out?

9. Have you researched cars online in the last six months? What device or devices did you use? (provide list)

- a. Laptop or desktop computer
- b. Smart phone (iPhone, Android phone)
- c. Tablet
- d. Other device Please specify: _____

9.a. If you selected multiple devices, approximately what percentage of time did you spend on each device doing your research?

- a. Laptop or desktop computer
- b. Smart phone (iPhone, Android phone)
- c. Tablet
- d. Other device Please specify: _____

9.b. Where do you use these devices when researching cars online?

- a. At home
- b. On public transportation (bus, subway, train)
- c. At work
- d. Where you buy a car
- e. Dining out, standing in line

9. Question for LM Customers

What part of the car research and car shopping journey would you like Liberty Mutual to help you with?

10. Conclusion (2 Minutes)

That's all of the activities we have for you today. Thank you very much for your participation. I think we had a very productive session. I know that we will be able to draw important information from your comments and therefore improve the way that people like you want car research and car shopping to work.

Does anyone have any final comments?

We may want to contact you for further information, or possibly another discussion session. Would you be interested in a future discussion on this topic or a similar discussion?

(Take names of interested participants for Round 2)

Thanks again for your input. **(Your honorarium is available.)** Have a great day.