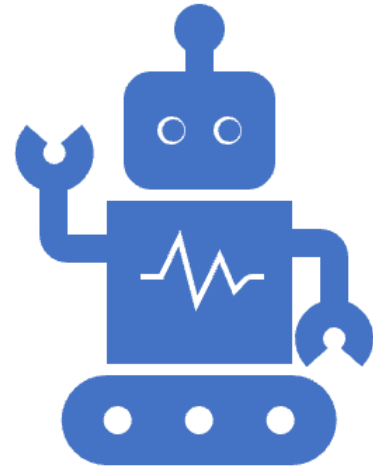# End-to-end Qualitative using AI Enhancements

Quirks Event NY

July 20, 2023

TION

Our Speakers

Joe Jordan

Chief Operating Officer

OvationMR

Erik Larsen

Chief Executive Officer

Qualibee.AI

Rethinking Qual With AI

- In this session, we showcase how to leverage AI to optimize the key pillars of the qualitative research process, including discussion guide ideation, questionnaire development, respondent screening, UX and engagement, analysis and enriched B2B insights with context.
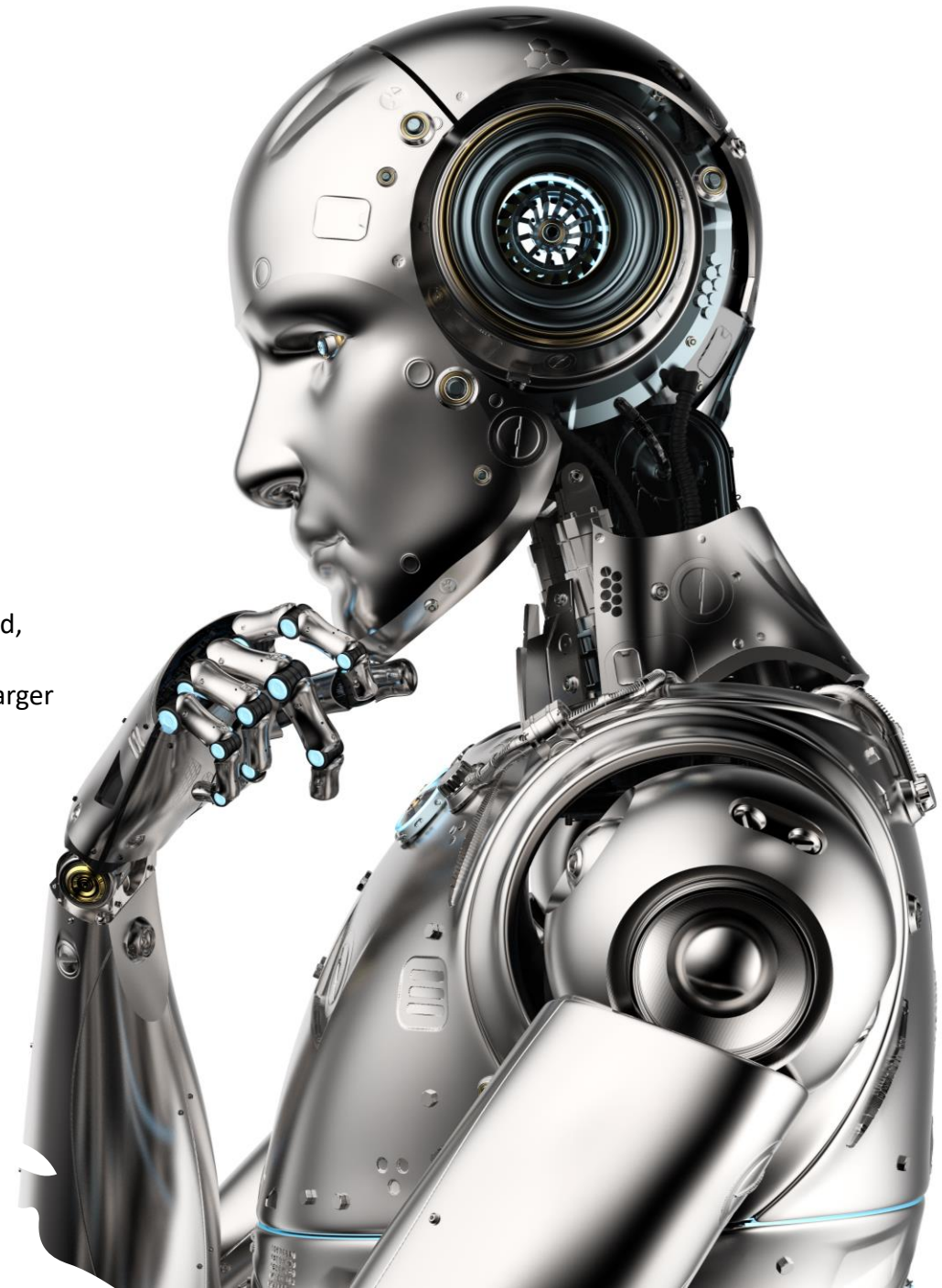
Use AI to your advantage in the research process to enhance core researcher skills and tasks.

Leverage AI to increase speed, respondent content and statistical significance with larger samples.

Drive insights by using new tools to align contextual information to specific business needs and research objectives.

Topics Explored in This AI Study

Study Objective

To better understand small to midsized business owners' awareness, current usage, and future intentions around AI as well as demonstrate the potential of AI in exploratory B2B studies.

Questionnaire Topics

- Awareness and experience with AI tools.
- How owners are currently utilizing AI in their business and how they see that usage developing in future.
- Current impact of AI on their business.
- Factors most important when choosing an AI tool for their business.
- Concerns around AI.
- Challenges implementing AI.
- Trusted sources of information.

VATION MR

Methodology

Research Objective: The objective of our research is to better understand small to midsized business owners' awareness, current usage, and future intentions around AI.

Why we did this: To learn more about how AI is perceived and used in SMBs as well as demonstrate AI driven qualitative capabilities.

Fielding Dates: July 7-July 9, 2023

Methodology: AI interview platform Qualibee.ai. The audience was sourced via OvationMR Supply.
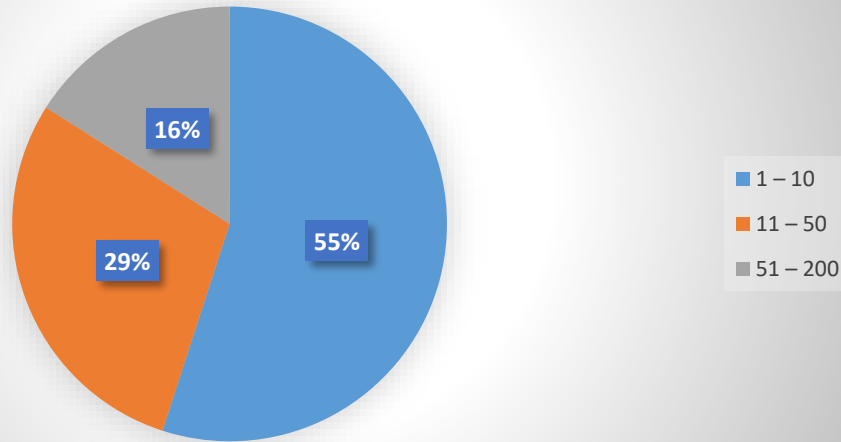
Methodology (cont'd).

Discussion Guide: OvationMR and Qualibee.ai collaborated on a Discussion Guide of 10 set questions to be asked of all respondents. AI would provide one follow-up to each question based on a respondent's answer.

Programming: The guide was programmed into Qualibee.ai and a prompt was written to provide the AI "moderator" with appropriate context.
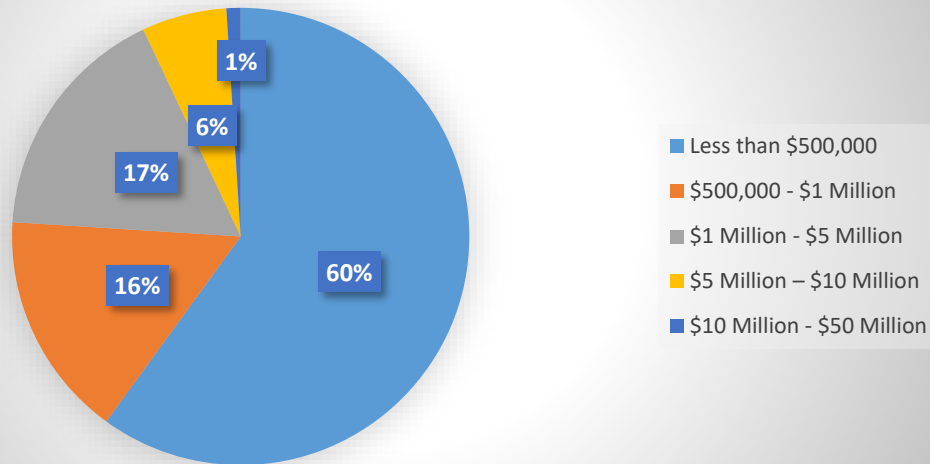
Recruitment: OvationMR handled all recruitment of qualified respondents.

Analysis: Analysis was conducted in the Qualibee.ai platform using both open-form prompts as well as a machine learning classification model.

VATION**MR**

Employee Count - Full and Part-Time Staff %

- 1 – 10
- 11 – 50
- 51 – 200

55%
29%
16%

Total Revenue in 2022 %

- Less than $500,000
- $500,000 - $1 Million
- $1 Million - $5 Million
- $5 Million – $10 Million
- $10 Million - $50 Million

60%
16%
17%
6%
1%

Respondent Profiles

80 interviews were completed using the Qualibee.ai platform

Respondents represented Owners and CEO's of SMB's across industries.

Qualibee.ai Output

Prompts allow users to ask an AI model for a wide variety of outputs. Examples from this study include:

- Key Takeaways
- Potential Use Cases
- Marketing Recommendations
- Product & Design Recommendations
- Survey Design

All examples used in this deck were:

- Generated by the Qualibee.ai model
- Based on the results of the interviews

OVATIONMR

AI Generated Follow-Ups

Qualibee.ai αlpha

Which artificial intelligence (AI) products are you aware of and what has been your experience with them?

I have experimented with ChatGPT.

AI Powered Question

What specific features or capabilities of ChatGPT have you found most useful for your business?

It has helped write marketing posts, proposals, and convert reports to PPT content.

OVATION MR

Key Takeaways – AI Generated

- **Small Business Owners:**
  - **Are Interested in using AI technology to improve customer service, marketing strategies, and operational efficiency.**

  - **Chatbots are seen as a valuable tool for engaging customers and keeping them interested.**

"We're hoping to use AI to streamline our marketing efforts and make them more targeted and effective." (Owner, <$500k)

"Chatbots have been a great way to engage with our customers and keep them interested in our products. They're always available to answer questions and provide helpful information, which has made a big difference in terms of customer satisfaction." (Owner, $1mm - $5mm)

OVATION MR

Key Takeaways – AI Generated

- **Small Business Owners:**
  - Have concerns about the cost and complexity of implementing AI solutions, but they also recognize the potential benefits.

  - Looking for AI solutions that are easy to use, customizable, and scalable.

  - Interested in evaluating the success of AI solutions through metrics such as customer satisfaction, sales growth, and operational efficiency.

"I think AI technology has a lot of potential to help businesses, but it can be expensive and difficult to implement." – Owner, <$500k

"I want an AI solution that is scalable and can grow with my business." – Owner, $1mm - $5mm

"We want to make sure we're growing our business and reaching new customers. AI can help us analyze data and identify trends, which can help us make smarter decisions about marketing and sales." – Owner, <$500k

VATION MR

Key Takeaways – AI Generated

- **Small Business Owners:**
  - Looking for AI solution providers that offer comprehensive support and guidance throughout the implementation and onboarding process.

  - Open to exploring different AI solutions and are willing to invest in those that provide a clear return on investment.

> *"It's important to have a clear understanding of what the AI solution provider is offering and how they can help you achieve your goals." – Owner, <$500k*

> *"I'm always looking for ways to improve my business, and AI seems like a promising option. I'm willing to invest in AI solutions that can help me save time and money in the long run." – CEO, $500k - $1mm*

VATION MR

Example Product Recommendations – AI Generated

Ease of Use
- Small business owners often have limited technical expertise, so it is important to make the AI technology easy to use and understand. This could include providing user-friendly interfaces, clear instructions, and intuitive navigation

Scalability
- Small businesses often start with limited resources and grow over time. It is important to offer AI solutions that can scale with the business, allowing them to add more data and functionality as needed.

Support and Training
- Small business owners often need support and training to successfully adopt new technologies. It is important to offer comprehensive support and training services, including documentation, tutorials, and personalized support from experts.

VATIONMR

Quantification Use Cases

- The AI was asked to identify potential use cases based on the study responses.

- Machine learning classification models categorize data into classes. This allows a user to see the relative strength of themes and entities.

- Chatbot

- Marketing strategy writing

- AI-powered customer service

- Data analysis and insights

- Automated scheduling and appointment booking

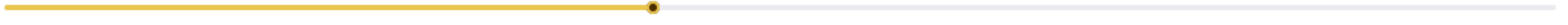- Virtual assistants

- Inventory management

Classification – Quantify Results

Prompt:
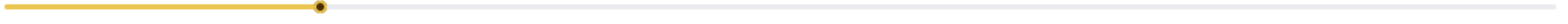Marketing, Sales, Customer Service, Inventory
Output:

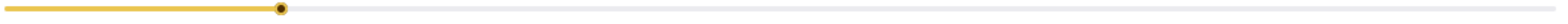|	
Customer Service:	0.42
Marketing:	0.2
Inventory:	0.2
Sales:	0.18

OVATION MR

Respondent Research Experience

Respondent Research Experience

Consideration of Personal Time & Increasing Engagement with Business Owners

Qualitative IDIs are difficult to schedule, since many Business DMs interviewees are unable to take time during business hours

- Too busy/not in an accessible environment
- Conflict to employer / customers
- Lack of professionalism
- Not ethical (incentive payment "going into my pocket")

AI allows respondents to participate at their preferred times

- Morning before the business day starts
- During lunch
- After hours, Fridays, or Days off
- Seasonality (Finance, Construction, education, etc..)

Respondent Research Experience

Consideration of Personal Time & Increasing Engagement (cont'd)

Those who might make good interviewees do not enjoy being survey respondents

- Feeling a lack of engagement
- May prefer giving written or spoken long-form responses
- Question response options don't reflect their opinions or experiences
- Shorter attention spans

AI can improve the respondent experience

- Asking follow-up questions that are relevant to the individual and based on their unique individual responses
- Conversational feel is more engaging
- Not limited in how they respond to a question

"This interface has made my survey experience very enjoyable. I want my customers to say the same thing to me." – Study Respondent

OVATIONMR

Considerations for an AI Future

Best Practices for Success

- ü Qual is the appropriate method for the research objective
- ü Have experts review prompts
- ü Verified respondents
- ü Respondents willing to engage in the format
- ü Ensure AI follow-ups are on topic and relevant
- ü Enable voice if possible
- ü Do not go too long (under 12 minutes)

Pitfalls to Avoid

- × Redundant questions
- × AI leading respondents
- × Random / bizarre/ off topic questions
- × Stakeholders want "survey style" quant output
- × Prompts that lead to poor analysis or follow-ups

Best Practices in AI Vendor Selection

Define your Research Goals Clearly

- Confirm their analysis & capabilities fit your needs
- Realistic about the type of work for which AI should or should not be used. Do not try to force changes in methodology when a survey or IDIs would be better
- What level of involvement of the research process do you prefer? DIY, totally hands off, hybrid.

Expertise: Honesty and Clarity Matters

- Are you working with someone who is the direct source of expertise/information, or are they your go-between to the AI developers?
- Provide Examples of their work - not promising the world
- Validate a partner is able to satisfy your company's security requirements- No exposing info out to the Web
- Have they worked with this audience before? Do they understand the Insights and MR industry

OVATION MR

B2B Research Industry:
Collaborating for Long Term Solutions/Improvement

What is the industry doing right to ensure AI is enhancing
researchers, not replacing them?

How can we continue to improve, and ensure better outcomes
for the Insights Industry and our core clients?

OvationMR will continue to drive and expand on
this research moving forward as part of our ongoing B2B
research improvement initiatives

VATION MR

Our Research Partners

AI Data Collection & Analysis:

THANK YOU

For your time

Please stop by Booth #500 to discuss how OvationMR can help you realize

It's A Great Day For Discovering Why

Example Questions – AI Survey Design

What are your biggest challenges or concerns about implementing AI technology in your business?

a. Lack of technical expertise

b. High cost of implementation

c. Data privacy and security concerns

d. Regulatory compliance issues

e. Cultural resistance to change

How do you plan to evaluate the success or effectiveness of AI technology in your business?

a. Increase in sales or revenue

b. Reduction in operating costs

c. Improvement in customer satisfaction

d. Increase in productivity or efficiency

e. Other (please specify)

Example Questions – AI Survey Design (cont'd).

What kind of support or assistance do you expect from an AI solution provider during the implementation and onboarding process?

a. Training and education

b. Technical support

c. Consulting services

d. Customization and configuration

How do you envision AI technology transforming your business in the long term?

a. Streamlining operations

b. Improving decision-making

c. Enhancing customer experience

d. Increasing revenue and profitability

OVATION MR