



Research Design

with Dr. Russell Robinson, EdD & Dr. Jessica Broome, PhD

Russell Robinson speaks with Jessica Broome, PhD, founder of Southpaw Insights. Southpaw Insights combines quantitative and qualitative research methods that range from traditional to cutting edge. In this conversation, Jessica shares her thoughts on how to conduct research from determining the right questions to creating an environment where data is actionable. Also, she shares an tips to help researchers when the data does not align with the customer's original hypothesis.

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ABOUT DR. JESSICA BROOME, PH.D.



Jessica Broome is a seasoned and dynamic researcher with diverse experience in both quantitative and qualitative methodologies. She focuses on rigorous questionnaire design to collect high-quality data, as well as using data to tell a story that leads clients to action.

Jessica has conducted results-oriented research for both agencies and end clients across a broad swath of sectors, including pharmaceutical, food, technology, financial services, consumer packaged goods, education, and non-profits. She began her career in the non-profit sector, interviewing inmates in both state prisons and city jails across New York. She then worked for several years in the research and insights departments of major public relations agencies, including Ogilvy and Edelman, where she managed the much-publicized Edelman Trust Barometer. She founded Southpaw Insights in 2008 to conduct meaningful research that helps organizations understand what people think, feel, and do.

Jessica holds a PhD in Survey Methodology from the University of Michigan and an M.S. degree in Applied Social Research from Hunter College. She graduated cum laude from Connecticut College, where she earned a B.A. degree in Sociology and minored in German and Hispanic Studies.

ABOUT DR. RUSSELL ROBINSON, ED.D.



Dr. Russell Robinson is the founder of Amplified Research and Consulting, LLC, which provides research, analysis and consulting solutions regarding employee engagement, voice and silence, and talent management. Russell's focus is helping leaders create a culture of learning and listening.

In addition, Russell has spent over twenty years as a civil servant within the US Federal Government. In his current role as the Senior Advisor of Training & Engagement of an agency's component, Russell provides solutions to improve the workforce experience; and help leaders inspire and influence those within their span of control. Additionally, Russell is an adjunct professor at American University where he teaches graduate-level leadership classes.

Russell received his Doctor of Education (EdD) degree in Human Organizational Learning from the George Washington University. He received a Master's in Public Administration from American University's Key Program, and a Bachelor of Science in Business Administration degree from the University of Dayton.



RUSSELL ROBINSON I've got Jessica Broome, founder of Southpaw insights, a qualitative and quantitative research firm based in the US. Jessica, how you doing today?

JESSICA BROOME I'm doing, great, thanks, Russ. How are you?

RR Pretty good, when I turn the microphone on.

[Laughs]

RR So, tell us a little bit about yourself and about Southpaw Insights?

JB Sure, my name is Jessica Broome, and I am a survey methodologist and social and opinion researcher. And at Southpaw, we do all kinds of qualitative and quantitative research to help our clients understand people. What do people think, and feel, and do. This could be anything from a large-scale survey like five hundred, or 1,000 or 2,000 people getting measurable data, getting metrics, or getting answers to mostly closed-ended questions. On the other side of the coin, we do qualitative data collection and analysis. So, getting at the "why", getting at the depth, getting at the meaning behind the numbers.

RR You mentioned understanding people. How are you finding that people are being impacted from wellness standpoint?

Companies are dealing with return to office, or will they go flexible or hybrid. Employees are dealing with a great deal of uncertainty in their workplace uncertainty in their home life, uncertainty in the world at large.

JB I think people are stretched pretty thin. From a consumer standpoint people are dealing with, on one hand, elation that COVID is over, and they can go to the mall, movies, and travel. At the same time, dealing with the fact that is it over and wondering what's happening? What's next? What's coming down the pike. From a workplace standpoint, we try to remember that employees are people first. Everyone we talk to, if they're consumers or shoppers, or employees...first they're people, right? So, what's driving them and what's on their minds? With employees, I think there's a lot on their minds. Companies are dealing with return to office, or will they go flexible or hybrid. Employees are dealing with a great deal of uncertainty in their workplace uncertainty in their home life, uncertainty in the world at large.

RR When you look at all of this uncertainty, Edelman's Annual Report on Trust talks about how trust has gone down. As a researcher, what are some of the impacts driving wellness beyond what we would have talked about three or four years ago?

JB For the things that are driving wellness, I think may be unrealistic expectations on all kinds of peoples' parts. If it's unrealistic expectations that I have for myself, my employees, and my customers. We've all been through a collective trauma over the past 31 months, and I think it's not realistic for anyone to think that people are going to really bounce back with no lasting effects, right? I think employers, in particular, need to take a pause and need to take a breath and need to understand from their employees what's going



on. You know, “tell me about your life outside of this little Zoom box because people have dealt with a lot of loss, a lot of death, a lot of fear, a lot of change, a lot of sorts of reshuffling of our own identities or understanding the world as we knew it.” I think trying to let people feel seen and heard and understood is the first step.

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RR Employees are bringing all of this newness, new factors, and new concerns into how they present themselves into the workplace. Let’s say I’m a Chief Wellness Officer or the researcher under Chief Wellness Officer, how would go about gathering and collecting data to handle all of these different drivers towards employees’ wellness?

JB Going back to the two sides of the coin. I think you need the numbers. You need the metrics. You need to understand if people are accessing the EAP, or are people taking sick days? There’s also an opportunity for employers to ask people what is wellness and what it means to them. This is a squishy term. It can mean a lot of different things to a lot of different people. Ask employees what wellness means to them, and what are the contributors to wellness for you and in your life? What’s making it go up? What’s making it go down, and the really getting at the “why” behind the numbers? Why are people feeling burned out? Why are they rating their satisfaction or their happiness so low? We talked about potential like under use of EAPs and the idea that people aren’t using them because they are stigmatized. Is there more there? Can we get deeper and talk to employees about, “Why aren’t you using the EAP? Is it because it’s stigmatized? Or is it because you don’t know what they offer? Or is it that you don’t have time in your day to even access it. If you just ask people and then sit back and listen, they might tell you something you didn’t even think to ask.

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RR When a customer would bring you in, and you’re trying to figure out what exactly the problem is. As a researcher, walk me through your process to figure out how you get to a point where you would figure out the right type of data to get and the right methodology to go about.

JB At Southpaw, we work with all kinds of clients across all kinds of sectors with all kinds of questions about all kinds of people. But we always start serving the same way of asking a client, “What do you want to know and why? What are you going to do with this information? Are you just going to put it on a shelf? Are you going to design a new program? Are you measuring something? Are you trying to get money?” So, understanding sort of the big picture, how whatever research they think they want to do fits into their organization more broadly. And then, I try to ask them about their hypotheses. What do you think is happening? What’s the null hypothesis? What are we trying to prove? What is the question we’re asking? If I’m feeling really bold, I will ask them. “What do you want to understand, or what do you want the results to look like? What would be your idea finding? What would be a finding that would drive action for you.?” For example, if they think we’re going to find that 90% percent of employees don’t use EAPs because of the stigma, or we think we’re going to find employees biggest stress is time spent on the commute. That’s a good starting point that can help us design research and design the right questions to get at what they’re what they want to know. But I would also



try to push them further by asking what would surprise them or make them rethink how they are addressing this issue; and get them talking up front about ideas they had not thought of before. Research is not, especially if we're in an exploratory phase, not always about the hypothesis. Then we're going to test it and prove to or disprove it. We're going to give you the results and we're going to move on. I think there's a lot of conversation upfront about what else could be happening.

RR You want to prepare people if the results aren't what they thought it would be, correct?

JB Exactly.

RR You gather this data. What are your next steps beyond analyzing the data?

JB If clients give us a list of their hypothesis and the dream finding they want to have. When we write instruments and discussion guides or focus group guides or surveys, we will always map back to hypotheses, and tell them like, "Okay, this is a question that's going to get it." But we'll also have some wildcard questions in there.

When we start our analysis, we start with sort of the lowest hanging fruit. "Okay? You had this hypothesis, you had this question, here's some answers that go to this. Then we go to the next sort of phase, which is some food for thought. Here's some stuff they didn't even ask about. When you asked about what people are using the EAP for, you asked about tobacco. And, we had 75% of people filling in that other box and we went in, and we coded those responses, and found that while you were focused on tobacco, your employees are telling us to actually the thing they are more concerned about is their weed habit or benzodiazepines habit. You didn't even know that from the way you asked the question focused on tobacco." We try to pull out the obvious direct answers to the questions, but also some of the surprises in the data...what's new and not expected.

RR When you get the data, and you get the surprises in the data. There is going to be a course of action if the data goes the way you're expecting, but a course of action if the data tells a story, you had not anticipated. How do you act on the results of the data?

What I would rather do is work with you and tell you what we saw. What it looks like it means. And offer a couple of things the client could do...It doesn't do anyone any good to have a nice looking deck or a pile of spreadsheets if you're not going to do anything with it.

JB Coming in as outside researchers, there are a lot of benefits in being a neutral third-party. People don't know us and tell us more than their boss or HR person. What I like to do is lay out my findings as...What?...So What?...and Now What? The What is about showing the data, the numbers, and the answers. The So What talks about what this means and what we can tell from the data. For example, tobacco is a problem, but weed is a bigger problem. People are worried about the commute, but they're more worried about the toxic work environment. These are the things that you need to think about. That third stage, the Now What, is more of a collaboration between us as researchers and anyone in the organization who might use that data. I'm hesitant to go into an organization and tell you exactly what you need to do based on this data as an outsider. What I would rather do is work with you and tell you what we saw. What it looks like it means. And offer a couple of things the client could do. And, talking to people by spending a couple of hours, or a day workshopping these findings, where they go, and how they fit into the organization. If they take that time, and spend time with you, and you as an organization take that time and spend that time with me to really think about the findings, then our work is much less likely to just end up on a shelf. It doesn't do anyone any good to have a nice looking deck or



a pile of spreadsheets if you're not going to do anything with it. It's harder and an extra step; sometimes we come out of that day finding something that the data are telling you to do something that your employees want; and you didn't want to do, or you don't want to spend money doing, but wouldn't you rather know that now than not?

RR Can you give me an example of where you did the work, and it didn't end up on the shelf and how the client acted on the data.

JB We did a project for an Ivy League university in 2021. A little less than a year after George Floyd was murdered. They wanted to know all the different members of the campus community. Such as faculty, staff, white students, students of color, faculty of color, and how are they feeling on campus? How are they feeling about the racial climate on campus? How are they feeling about policing and safety? Because this campus university actually had their own police force. And there were some concerns that people were being treated differently by the campus police force. I think part of the thinking going into it was that we'd do focus groups, we'll talk to people. Just feeling heard will be cathartic, which it is. Being heard is always cathartic. A lot of people participate in research because it's the only chance they have to get their voice heard. The \$50 or \$100 that we give them is nice, but really, they just want to be listened to.

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But in fact, when we went in, and we talked to students and faculty and staff, especially students and faculty of color, they were like, "We can't go on like this. We can't keep coming to school being expected to perform at this level and worrying about our safety and campus police are supposed to protect us and the culture on campus is just fear and tension, and it's not working." We went back to the client with these striking, but really not surprising findings. It wasn't what they wanted to hear. They wanted everyone to hear like when people say that it's been rough, and thanks for asking and listening. They think they're in a better place now and they weren't, people were still really distraught. It's been about a year-and-a-half since we did that study and we just found out a couple of weeks ago that university actually hired their first Black Chief of Police of their campus police department, which I think probably going into our research wasn't what they thought was going to come out of it. They thought they might have a nice report and we would talk about the student experience, but they've ended up kind of relooking at campus safety and how they're dealing with it.

RR From the research you've done recently, what are some of the wellness concerns you're hearing about?

JB Everything we do links to wellness, directly or indirectly. What people think, and what they feel, and what they do, and what they buy and how they react to content—I think it's all relates to wellness. One thing we've been finding is that employees are a lot less likely to sit back and take it. In this era of great resignation, great reshuffling or quiet quitting, employees have realized like they have the power to ask for what they want. Some of that might be a Gen Z thing. I don't know if you have any Gen-Zs in your workplace, but they will ask for what they want. I think there's a lot less of the Gen-X and Boomer and pre-COVID mindset of "this is how we do it, and this is how it's always been done." I think there's an openness to all kinds of crazy ideas or flexibility in the workplace and people are demanding that in a way that they never have before.

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RR So, if I'm if I'm a Boomer or Gen X, and I've got these Gen Zs and Millennials who are experiencing things different, how would I collect data different based on their experiences?

JB I would say this to any researcher in any scenario, but I think with generations it's especially important to leave your judgments outside. If I'm doing an interview with Gen Z employees, their experience is different from mine. I can't go in and say and with the with this sort of preconceived notion of like, "well they should do it how we did it." Gen X, our big thing is that we had to pay our dues, and we had to work hard in the beginning so everyone should have to work hard in the beginning. It's about leaving that aside. And asking them, what's their experience? Asking what's hard for you in this in this moment and knowing that they grew up in a different time, and their adulthood has been in a different time from ours. We're not the same, so they're the experts on their own lives. Any person is the expert on their own lived experience. For me to go in as a researcher and try to expect them to think the things I do or judge them for not acting the way I do, you're not going to get very far.

RR There seems to be a value, need or step that says, "I really have to look at who all my stakeholders are." And understand them and talk to them to develop whether to do quantitative or qualitative research, and get a cursory view of exactly what the problem is out there, is that make sense?

JB Oh yeah, 100%.

RR Is there a process? To identify who the stakeholders are before you start developing your data collection methodology.

JB The stakeholders are anyone who's going to make use of the findings. Anyone who's gonna need to interpret this or need to put this to use. The broader or the more eclectic group of stakeholders you have the harder it is to design a study or to design an instrument, but the more valuable it will be in the end. For example, instead of just talking to the CEO of being like, "What do you want to know and this research? Okay, let's go do it." You are probably better off talking to the CEO and then some heads of departments, and asking, "What do you want to know what's going to help you?" It's about getting a multi-faceted view with multiple inputs at every stage of the process. This isn't to say I want everyone in your organization telling me what questions to include. It's about broadening your definition of stakeholder. It's whoever's going to be able to be the one responsible for activating these findings within the organization.

RR Last question, I'm doing this for the first time, and I'm intrigued by this conversation. What would be something good to read to learn more about data collection?

JB Well, SouthpawInsights.com, we have a blog where we talk about all kinds of data collection issues and research our own experiences. Another place that would point people to that's a great resource is the Insights Association website and they have the Idea Council, which, is a working group that's been doing a lot of work lately on inclusivity in research. So, I feel like this is a great place to start and even if you know nothing about research it will give you a lot of ideas to get you started on the right foot.

RR Jessica, thanks for giving me this Research 101 course.

JB I hope it was helpful. This was so fun. It's always a treat to talk to you.