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FOCUS GROUPS

- MARKETING PLAN -

OBJECTIVE (the “why”)

The objective explains why you’re running the focus group — what insight you’re trying to gain.
Common objectives include:

- To test reactions to a new product, service, campaign, or idea before launch.
- To understand perceptions, needs, or pain points of a specific group.
- To evaluate clarity and effectiveness of messaging or materials.
- To identify motivators and barriers to engagement, participation, or purchase.
- To gather qualitative feedback that complements survey data.

In short: the objective is the research question you want the focus group to answer.

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TARGET AUDIENCE (the "who")

The target audience defines who should participate in the group to best answer the research question. You want participants who represent the population you need insights from. Examples:

Students (current, prospective, transfer, or alumni) if the goal is to test student messaging.

Faculty/staff if the goal is to understand internal communication or policy.

Community members if the goal is to measure external perception or public engagement.

Segmented sub-groups (e.g., first-gen students, parents of high schoolers, career changers, donors, etc.) If you want very specific insights.

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TIMELINE

Plan 6–8 weeks start to finish (though it can be condensed to 3–4 weeks if recruitment is quick).

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TIMELINE

6–8 Weeks before

Define research objectives (what you want to learn).

Identify target audience(s).

Decide on number of groups (usually 1–3 per segment).

Set budget (incentives, space, recording, refreshments).

Book date(s), time(s), and location (or virtual platform) (check availability and avoid conflict with other events).

4–6 Weeks before

Develop a recruitment plan (email lists, flyers, social media, partners).

Create screening questions to ensure the right participants.

Draft a discussion guide with 6–8 key questions.

Secure a moderator and notetaker.

Develop smartsheet registration form.

Generate QR code registration link.

2–3 Weeks before

Begin recruitment of participants (aim for 12–15 invites to get 6–10 attendees).

Confirm incentives (gift cards, stipends, swag)**.

Set up RSVP/registration system.

Test tech setup (Zoom, recording tools).

1 Day before

Send reminders (email/text/call).

Reconfirm logistics (room, seating, AV, food).

Print materials (consent forms, name tags, discussion guide).

* Include the consent form in the Smartsheet.
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DAY OF SESSION

Prepare space (circle/U-shape seating, name tags).

Lunch time serve refreshments (water and pizza). Consider the diet restrictions.

Welcome participants, review consent, and explain process.

Run session (60 minutes). Arrange and give participants incentives and send a thank you email.

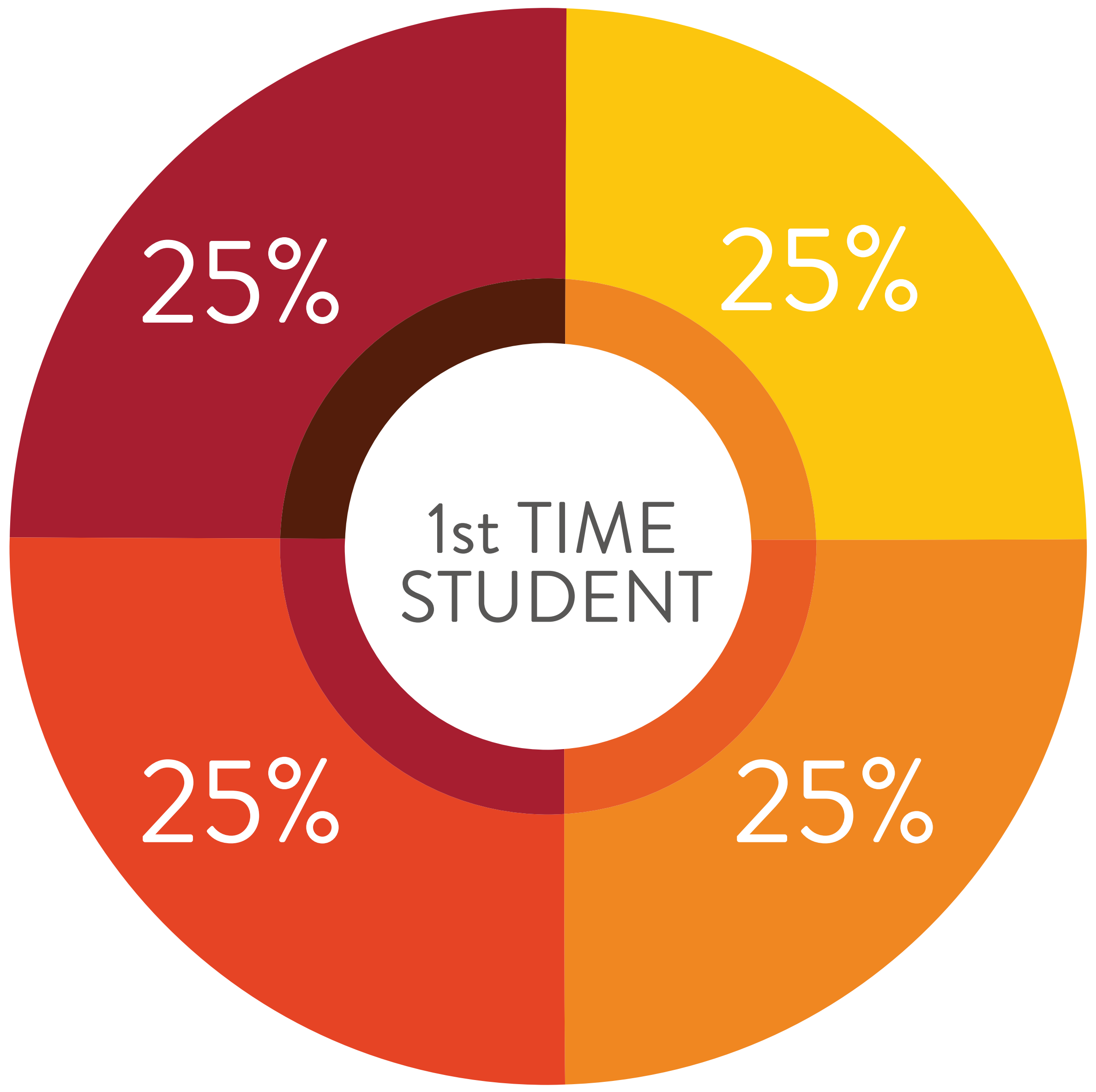
SUCCESS METRICS & TRACKING

1–2 Weeks after

- Transcribe or summarize recordings.
- Analyze data: themes, quotes, recommendations.
- Deliver report or presentation to stakeholders.

Ethnicity

Representation: If your audience is diverse, the group needs to reflect that diversity.
Cultural perspectives: Different ethnic groups may have distinct experiences, perceptions, or barriers.
Comfort & openness: Participants may feel more comfortable sharing openly in groups where others share similar cultural or linguistic backgrounds.



Enrollment Status

BEFORE THE SESSION

Over-recruit: Invite more people than you need (e.g., recruit 10–12 to get 6–8 to show up).

Clear incentive plan: Decide what (gift card, cash, swag) and how (before or after the session).

Confidentiality & consent: Prepare a short statement/consent form about how feedback will be used or include it on the Smartsheet.

Ground rules: Draft simple norms (respectful listening, no right/wrong answers, one person speaks at a time).

Backup plan: Have alternates if participants cancel; test tech in advance if virtual.

DURING THE SESSION

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Moderator script: Include intro, warm-up, key questions, and closing.

Icebreaker question: Easy question to get people comfortable (e.g., "What was the last time you felt proud of being a student here?").

Time management: Keep the session within 60 minutes.

Recording & note-taking: Audio/video if allowed, plus a notetaker to capture nonverbal reactions.

Participant comfort: Seating arrangement (circle/U-shape), snacks, and a relaxed atmosphere.

AFTER THE SESSION

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Thank-you follow-up: Send a short thank-you email/text.

Incentive distribution: Deliver promptly if not given at the session.

Data organization: Code notes by theme (barriers, motivators, needs, perceptions).

Report format: Decide whether to share a formal report, key insights memo, graphs or presentation.

Action plan: Identify next steps so insights don’t just sit in a file.

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EXTRA CONSIDERATIONS

Number of groups: One focus group rarely gives enough data; usually aim for 2–3 per audience segment.

Accessibility: Ensure ADA compliance, provide interpreters if needed, check for tech access if online.

Neutral facilitation: Use a moderator who’s not directly tied to the project to reduce bias.

Ethics: Be transparent—don’t mislead about purpose or use of results.

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THANK YOU

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