<< Business Name >>

Conducted on: <<date>>

Location: <<location>>

By: <<your name>>

Focus Group

Discussion guide

Facilitator’s Guide

**This is the Focus Group Discussion Guide for Facilitators. The text in blue is there as additional information and pointers for you as guide the Focus Group.**

**Objectives:**

The objective of this focus group is to gather general perceptions, descriptions of needs and overall views of individuals that are [target market]. This information will be collected in an anonymous nature as the information collected per individual is not as important as the collective views of the group as a whole.

The information gathered in this focus group will be utilized by [Advisor’s Firm] to further develop a business plan that will incorporate the findings from this study. For example, if a certain topic is found to be very important to [target market], then [Advisor’s Firm] will research the possibility of creating special solutions to address that topic. Or if a topic is found to be viewed as unnecessary, then [advisor’s firm] would spend no more time developing that topic.

**Rules:**

1. We ask that all discussions remain friendly and all participants respect each other’s opinions. Remember, in a focus group like this…ALL answers are correct!
2. Due to the limited amount of time, we ask that you try to keep comments, observations and feedback limited to the topics being covered. Please excuse the facilitator if during the conversation they steer you or others back on topic.
3. We are more interested in your opinions as they apply to <<Target market >> than about your specific situation. If you wish to share personal experiences you are welcome, but it is not necessary.
4. We will be recording this meeting simply to make sure that we do not miss any of your comments or feedback. If there is anyone who objects to this please let me know.
5. We ask that you remain for the full 60 minutes, as at least that much time will be needed to cover the topics fully.
6. If you need to use the lavatory, please excuse yourself and leave your materials in the room and come back when you are able.

**Welcome and Introductions**

**Welcome:** (The first task in a focus group is to get everybody warmed up and ensure that everyone says something. You should usually use about 10 minutes to do this. If you succeed in this the rest of your focus group will go much more smoothly.)

You the facilitator will introduce yourself and begin with a gentle topic such as…where you were born…or what your favorite food is…anything that is easy to answer and might spark some interest.

Now go around the room and have each participant do the same thing. This is just to loosen up the room and get them speaking. Let them know that this has nothing to do with the focus group except to get to know everyone a little bit.

**Introduction:** (This is where you will use the Introduction Script from the Focus Group Marketing Guide to let them know what the focus group is all about.)

**Conducting the Focus Group:** This portion should look like the following template, though your questions will depend on your Target Market - their fears and frustrations and your solutions to them.

Each question that you put to them should have a 1-5 sliding scale.

One, for how important they think it is for them to know about the item discussed…what you are doing here is getting them to admit it is very important to them.

Two, for how important they think it is for their advisor to cover this item…what you are doing here is to get them to visualize in their minds eye:

* “Hey, I want that!”
* “My guy doesn't do that!”
* “I need to talk to this guy more.”
* “This guy is doing all the things I want my guy to do.”
* “Wow, my friends need to know about this guy. He's doing all the things that we want.”

**Discussion Topics:**

1. Caregiver’s Resource Guide

**Importance of individual being familiar with topic** (Please circle one)

1 2 3 4 5

*Not important→→→→→→→→→→→→→→→Very Important*

**Importance of Financial Advisor covering topic** (Please circle one)

1 2 3 4 5

*Not important→→→→→→→→→→→→→→→Very Important*

**Notes:**

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1. (Next topic or solution you wish to present)

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1 2 3 4 5

*Not important→→→→→→→→→→→→→→→Very Important*

**Importance of Financial Advisor covering topic** (Please circle one)

1 2 3 4 5

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**Summary**

Thank You for your valuable input!