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Title

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Permalink

<https://escholarship.org/uc/item/3h93k14w>

ISBN

978-0-8389-3909-3

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Publication Date

2022

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More Than a Secondary Strategy:

How to Actively Incorporate Primary Research into Your Instruction Session

Sara Heimann and Summer Krstevska

Introduction

Primary research is known by many names in entrepreneurship, including market validation, customer discovery, and user research. Each of these refers to the process of determining whether or not an opportunity exists in the market for your product or service and usually involves conducting surveys, interviews, or focus groups with potential customers.

In an effort to align with the Lean Startup method, which is becoming more mainstream, entrepreneurship is increasingly encouraging a bottom-up approach to research. Created by Eric Ries and popularized by his 2011 book, *The Lean Startup*, this approach seeks to develop businesses, or products and services, in a way that is less risky than traditional processes. The Lean Startup method aims to shorten product development and rapidly determine if a business model is viable by encouraging customer feedback over intuition, iterative design over costly upfront development, and flexibility over planning. Due to the widespread adoption of this approach among faculty and mentors, entrepreneurs are often advised to talk to the customer before conducting secondary research. However, the assumption that entrepreneurs already possess the knowledge and skills to perform effective primary research is, unfortunately, not always a reality.

The interdisciplinary nature of entrepreneurship means that entrepreneurs come from a variety of backgrounds. As a result, their experience and relationship with primary research vary. Some may have taken a research methods course as part of their formal education but may not recognize that these skills are transferable to entrepreneurial

research. Others have not yet been introduced to the differences between primary and secondary research. Consulting with entrepreneurs during their research process, librarians are in a unique position to observe and address this gap.

While most librarians agree that primary research is a critical component of the entrepreneurial research process, there is much less agreement on librarians' role in supporting primary research. Discussions with business and entrepreneurship librarian colleagues have revealed varying opinions about who is responsible for educating entrepreneurs about primary research, the level of expertise necessary to support this type of research, and the most effective methods for addressing entrepreneurs' primary research needs.

Librarians' differing opinions on this topic are seen in the varying levels of attention primary research receives in reference and instruction services. Some librarians refrain from addressing primary research, viewing it as outside the scope of their position, while others take a "hands-off" approach, simply recommending resources on primary research methods for entrepreneurs wanting to educate themselves on this type of research. Some librarians, however, try to take a more active approach and incorporate primary research topics into library instruction sessions.

Traditionally, librarians are seen as secondary research experts, with primary research falling outside of our domain. However, successful entrepreneurship research requires both primary *and* secondary research. As librarians well know, not every entrepreneurship-related question can be answered by a database. Focusing solely on secondary research resources and strategies in information literacy instruction would be a missed opportunity for this community. The active learning exercise presented in this chapter is one example of how librarians can help entrepreneurs recognize the role and value of primary research in the entrepreneurial process.

Planning

Number of participants

This exercise was successfully tested with a class of 18 students; however, there are no strict requirements on the number of participants required to implement this exercise. While the exercise does include a peer feedback aspect, modifications (described below) can be made if the exercise is taught in a one-on-one setting. If using an online collaboration tool(s), the maximum number of participants may depend on the audience limits of the selected tool(s). A list of alternative/substitute tools is provided later in this chapter.

Audience

The exercise was taught in a class consisting of both lower- and upper-division undergraduate students. As previous knowledge of primary research is not required, this exercise is appropriate for audiences of all levels and disciplines.

Preparation and Resources

This exercise was taught online asynchronously and took approximately two hours to prepare. Preparations included creating a poll, developing exercise instructions and content, including the "Best Practices for Survey Question Design" handout, and, finally,

posting all material in Canvas and determining due dates. Future preparation time can be reduced as resources, content, and instructions have been shared here for ease of reuse.

This exercise utilizes online tools to facilitate polling and collaboration among participants. Google Forms (free) (<https://www.google.com/forms/about/>) was used to survey students in part 1, and the discussion board feature in Canvas, an institutional Learning Management System (LMS) (<https://www.instructure.com/canvas/>), was used for the crowdsourcing of questions and feedback in parts 2 and 4.

Description of Lesson/Activity

This is a multi-part active learning exercise that seeks to increase entrepreneurs' familiarity with best practices for conducting effective and ethical primary research, specifically surveys. Part 1 involves gauging participants' previous knowledge and experience with primary research using a poll or survey. Doing such also allows for the instructor to model best practices for survey question design. Part 2 provides participants with the opportunity to practice developing primary research questions in response to a short case study describing a hypothetical new venture. Part 3 introduces participants to common survey question design best practices and considerations. Part 4 gives participants the opportunity to apply what they have learned by revising or commenting on how the questions posted in part 2 could be improved based on the best practices.

Learning outcomes

1. Recognize the role and value of primary research in the entrepreneurial process.
2. Describe some best practices for conducting primary research surveys.
3. Practice developing ethical and effective primary research survey questions.

Time required

This exercise was implemented during an asynchronous, week-long module. To encourage students to complete the multi-part exercise in the suggested ascending order, two due dates were utilized. Parts 1 and 2 were due at the beginning of the week, with parts 3 and 4 due at the end of the week to ensure scaffolding.

If this exercise is being implemented in an online, asynchronous environment, the time required can vary depending on module length. As long as activities are done in order, the exercise can be done over the course of a day or a week.

If this activity is being implemented synchronously, online or in person, the suggested time requirement is approximately one hour. The hour timeframe is flexible, but the suggested time allocated for each activity includes 5 minutes to introduce yourself and the exercise before beginning the multi-part exercise, 5 minutes for the brief survey or poll in part 1, and 10 to 15 minutes for each of the activities in parts 2–4.

Teaching Outline

1. Survey/poll participants on prior knowledge.
 - Use the suggested survey questions (below) or create your own to better inform you of participants' needs.

- a. Have you learned about primary research in a previous course? If yes, please briefly describe the course and what topics it covered.
 - b. Have you conducted your own primary research (informally or formally)? If yes, please briefly describe your research.
 - c. In your own words, what is the difference between primary and secondary research?
2. Review case study and prompt participants to create 2–3 survey questions.
 - Use the case study, prompt, and instructions below, or create your own that are more relevant to your particular participants' needs. Participants may also use their own venture idea instead of the case study.
 - a. Case study. You want to start a seltzer (a brewery for craft seltzer)! Your plan is to solely specialize in the new craze: brewing spiked seltzers. With the increase in spiked seltzer trends, consumers (mainly Millennials and Generation Z) are drinking less wine and/or spirits.
 - b. Prompt. What questions would you ask the consumer to help you determine how to compete with the category leaders, including White Claw & Truly, in attracting Millennial/Gen Z consumers?
 - c. Instructions. Please come up with 2–3 survey questions you would like to ask your potential customers to help you determine how to best compete with market leaders.
3. Have participants review the “Best Practices for Survey Question Design” handout (<https://tinyurl.com/y5avmtf8>).
4. Instruct participants to reply to a classmate(s) with suggestions for improvement based on the best practices handout.
 - Use the instructions below.
 - a. Instructions. After reviewing the “Best Practices for Survey Question Design” handout, please respond to 1–2 of your classmates' questions from part 2 with feedback on how the question(s) could be improved to avoid potential primary research challenges. Make sure to provide an example.

Additional details

If time allows, a variety of assessment activities could be used to evaluate participants' learning and experience completing the exercise. An example of a summative assessment activity would be to have participants complete a brief reflection (e.g., a one-minute paper) that prompts them to consider what they have learned, why what they have learned is important, and what they are still unsure of.

Transferability

The exercise is designed to be easily adaptable to various types of instruction sessions, such as one-shots, workshops, and for-credit courses, as well as different learning environments, including in-person and virtual settings. Instructors can also customize the exercise to fit the time available, as well as their pedagogical preferences.

Substitute databases/tools

There is an abundance of online polling and collaboration tools available that can be utilized for this exercise. While the list of tools below is by no means exhaustive, it provides ideas for alternative tools that can be substituted for those used in this exercise.

For the polling activity in part 1, some options include

- Google Forms (free) (<https://www.google.com/forms/about/>)
- Mentimeter (free) (<https://www.mentimeter.com/>)
- Poll Everywhere (free) (<https://www.polleverywhere.com/>)
- Slido (free) (<https://www.sli.do/>)
- Survey Monkey (free) (<https://www.surveymonkey.com/>)
- Zoom polling (licensed accounts) (<https://zoom.us/>)

For the collaboration activities in parts 2 and 4, some options include

- Padlet (free) (<https://padlet.com/>)
- Google Docs (free) (<https://www.google.com/docs/about/>)
- Learning Management System (LMS) discussion boards (e.g., Blackboard, Moodle, etc.) (free and institutional versions) (<https://www.blackboard.com/>; <https://moodle.org/>)

Ability to transfer to online or to in-person

The components of this exercise are extremely flexible and can also be easily adjusted to suit both in-person and online settings. Originally designed to be taught in person, the instructors were able to quickly transfer the exercise to an asynchronous online environment as a result of the shift to remote learning due to the COVID-19 pandemic.

A synchronous online setting allows for additional options for soliciting responses from participants, in addition to those mentioned above. If using a web conferencing platform, such as Zoom, participants could respond to poll questions verbally by raising their hand (either physically or virtually) or using the chat feature. The instructor also has options for disseminating the best practices handout. This could be done by using the screen share feature to display the content as a document or slideshow or posting an external link in the chat. In addition, instructors can take advantage of the synchronous setting by using breakout rooms for the question development and feedback activities or using a real-time collaboration tool, such as Padlet.

In an in-person setting, the implementation of this exercise depends on participants' access to technology. If computers (or other devices with internet access) are available, online collaboration tools are a great way for participants to collaborate and provide feedback to one another. However, this exercise can also be taught "tech-free," with participants responding to poll questions by raising their hands and sharing answers out loud. Participants could also use pen and paper (or a whiteboard) for the question development and feedback activities. These "tech-free" options can also be used as a backup plan if technology fails during the session.

It is also recognized that the exercise in its entirety may not be appropriate for all instruction sessions due to time constraints, particularly in synchronous settings. If time is limited, instructors can customize the exercise for their purposes by choosing to implement one or more activities from the multi-part exercise or by making modifications to individual activities. For example, instead of having participants develop their own survey questions for part 2, the instructor can provide examples of (imperfect) survey

questions and ask students to work together to provide feedback on the examples after reviewing the best practices. Additionally, participants could complete parts 1 and 2 prior to the session, leaving more in-class time for discussing survey design best practices and providing peer feedback.

Different class sizes or audiences

This exercise can be done with any number of participants. If taught in a one-on-one setting, the instructor can also participate in order to facilitate the peer feedback portion of the activity, or the learner could reflect on their own work. If the maximum audience capability of an online collaboration tool is an issue, an alternative tool can be used. This exercise could also be relevant for audiences besides students, such as individuals or teams participating in an accelerator, incubator, or other entrepreneurial program in which participants are encouraged to conduct primary research.