Improving Relationships of Field, Moderator and Buyer

Presented by Judy Langer, Langer Qualitative
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QRCA Field Committee

- **Our mission**
  - Promote highest standards in recruiting, facility use, respondent treatment
  - Constituencies: field, moderators, respondents, clients
  - FieldCom members mix of moderators-only, moderator/field service owners

- **Our approach**
  - Relationship-building based on mutual respect
  - Education, develop best practices
  - Improving communications
QRCA FieldCom Initiatives

- **Recent**
  - Recruiters on Respondent Cooperation Study
  - Social Media Use in Recruiting Study
  - Respondent Privacy Whitepaper
  - “Sweet 16” Dos/Don’ts of Field/Moderator Relationships

- **In the works**
  - Qualitative Respondent Registry in the U.S.
  - Cost Estimate Whitepaper
U.S. Qualitative Respondent Registry

- MRIA/FieldCom collaboration to understand QRR
- Market Research Association to create U.S. National Respondent Registry database
- QRCA Board approval pending

*We’re very excited!*
Respondent Cooperation Study

- 10 focus groups with recruiters
  - 5 each consumer and business/professional recruiters
  - Conducted by FieldCom members

- To understand recruiting realities today
Respondent Cooperation Trends

- **Helping**
  - More public awareness of market research, focus groups
  - Economy incentives more attractive

- **Hurting**
  - Business-to-business gatekeepers, no participation policies
  - Recession longer work hours
  - Busy lives less time, distracted attention
  - Cellphones harder to reach people
Respondent Cooperation Factors

- **Helping**
  - Interesting, relevant topics
  - Incentives fit market, segment, homework
  - Positive past participation referrals, word of mouth
  - Positive research experience

- **Hurting**
  - Narrow specs/quotas – discourage database respondents
  - Client list inaccuracies, non-disclosure of sponsor
  - Random digit dialing
  - Homework too much, incentives too little
  - Scheduling at times bad for respondents
  - Last-minute changes in schedule, screener
  - Slow confirmation of holds
Respondent Cooperation Screeners

- **Hurting**
  - Too long
  - Mini-survey questions “for information,” not screening
  - Unclear wording
  - Long response lists
  - Recall of long-ago behavior
  - Redundant questions/scales
  - Difficult skip patterns
  - Terminate questions at end waste respondent/recruiter time
Respondent Cooperation Issues

- Cheaters/repeaters smarter on “gaming the system”

- Field procedures helping to reduce C/Rs
  - Electronic monitoring of recruiting
  - Confirmation calls checking screener info with 2d recruiter
  - Database updated on participation
Respondent Cooperation Recruiter Ideas

- Recognize what makes recruiting:
  - More difficult – even impossible
  - More expensive
  - More time-consuming

- Helping cooperation
  - Consult project manager on scheduling, incentives
  - Homework relevant, appropriate incentives
  - Inform client list respondents of sponsor if possible
  - Confirm holds promptly
  - Meals at mealtimes
Better screeners
- Introduction engaging, honest
- Brief project manager by phone on desired respondents
- Length 10 mins max, questions for recruiting only
- Skip patterns, instructions simple/clear
- Terminate after disqualifying question, especially if sensitive (e.g., age, ethnicity)
- Avoid algorithms
- Key questions open-ended/answers unread – harder for C/Rs
- Children’s questions simple, age-appropriate
- Numeric vs. verbal scales on statement list
- Articulation questions on study topic vs. “silly” ones
- Terminate questions near beginning when possible
- Phonetically spell out difficult terminology
Social Media in Recruiting Study

- 2 online bulletin boards
  - With field service owners (some QRCs), a few QRCs-only
  - SMR uses, advantages, issues, best practices
  - SM = sites, blogs, forums
Social Media Recruiting Today

- **Current use**
  - Estimates of extent vary widely
  - More growth expected
  - Across methodologies, study types – not just online
  - Supplements regular recruiting

- **Reasons for use, advantages**
  - Locate low incidence people
  - Verify some respondent information (e.g., employment)
  - Can save recruiting time, effort, expense
Social Media Recruiting Concerns

- Many people not on SM (yet)

- SMR used alone inadequate
  - Need to know respondents better, explain research process

- The right sites
  - Sometimes hard to locate appropriate ones
  - Some attract cheaters/repeaters

- Respondent privacy issues of sharing information

- Informing clients needed?
Social Media Recruiting Ideas

- **Suggested best practices**
  - Use more reputable SM sites
  - Follow SMR pre-screen with phone screening
  - Don’t give away study specs, use “huckster” talk in initial messages/pre-screens
  - Follow SM etiquette – don’t intrude on forums, etc.
  - Be as transparent as possible on recruiter identity, study info
  - Respect respondent privacy – don’t give clients PII
  - Respondent non-disclosure agreement re study info online
  - Train recruiters on SMR
  - Consider informing/educating clients on SMR use

- **Remember SMR is still evolving**
Respondent Privacy Whitepaper

“How and Why Qualitative Respondents’ Privacy Must Be Protected”
- Dealing with client requests for recontacts, PII
- Excerpts of research organization best practices
- Sent to research organization websites, QRCA facility list

Guidelines
- Obtain respondents’ explicit permission
- Request at interview end or field service contact afterwards
- Write reasons for recontact, info uses, hold field harmless
“Sweet 16” Relationship Dos and Don’ts

#1 Put things in writing…
#2 … but don’t forget to talk
#3 Keep the facility informed on schedule changes
#4 Communicate regularly during the project
#5 Use client’s name in screener if possible
#6 Use algorithms with care
#7 Don’t choose a field service on price alone
#8 Decide on respondents on “hold” quickly
#9 Don’t wait until last minute with special requests
#10 Ask about facility’s physical set-up if relevant to study
#11 Provide a self-administered rescreener
#12 Prepare the qualitative assistant in advance
#13 Work closely with the QA
#14 Build positive field relationships
#15 Make payment arrangements in advance

AND…
“Sweet 16” Relationship Dos and Don’ts

#16 Most important: follow the Golden Rule!

Golden Rule
Do unto others as you would have them do unto you.
In Progress: Cost Estimate Whitepaper

- Items to consider in field estimates
  - Transparency/communication ➔ fewer nasty surprises

- Factors to consider
  - Costs vary widely
  - Included vs. added option
  - Proposal estimates ≠ final costs
    - Recruiting specs, facility set-up, materials/equipment, refreshments, shopping, schedule changes, etc.

- We want your input!
Future FieldCom Initiatives

We’d like to hear your thoughts!

- Moderator
- Field
- Buyer
QRCA Field Committee

- For whitepapers, articles, questions, answers, ideas, etc., contact judy@langerqual.com