

# Improving Relationships of Field, Moderator and Buyer

Presented by  
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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

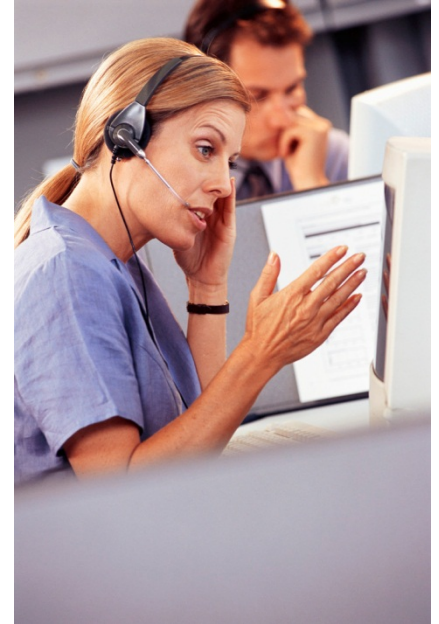
- ▶ MRIA/FieldCom collaboration to understand QRR
- ▶ Market Research Association to create U.S. National Respondent Registry database
- ▶ QRCA Board approval pending

*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

# Respondent Cooperation Recruiter Ideas

## ► 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

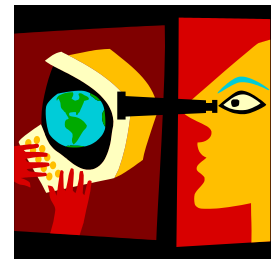
## ▶ Suggested best practices

- 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!**



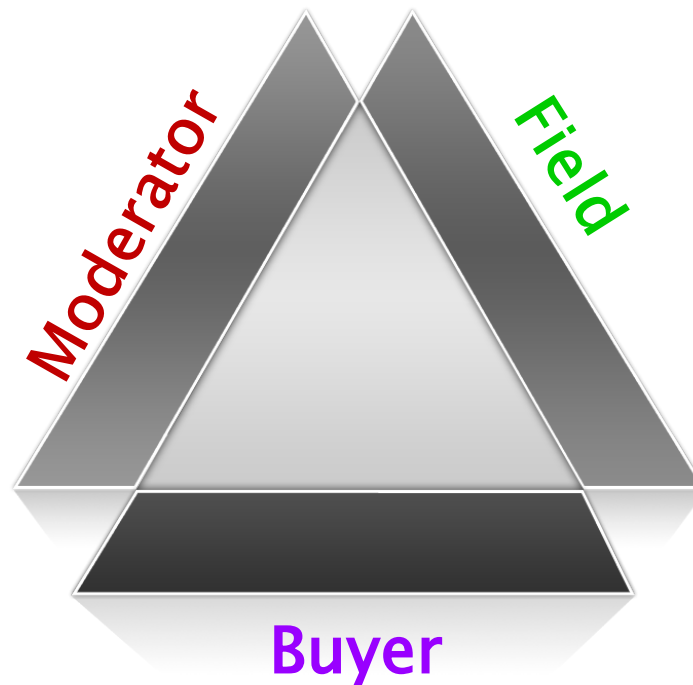
# In Progress: Cost Estimate Whitepaper

- ▶ **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!



# QRCA Field Committee

- ▶ For whitepapers, articles, questions, answers, ideas, etc., contact [judy@langerqual.com](mailto:judy@langerqual.com)

