

White Paper



4 Keys to Successful Phone-to-Web-Recruits

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Innovations in online methods (Adaptive Choice Based Conjoint, Audio/Visual Concept Tests, Virtual Stores, etc...) have enabled market researchers to utilize these web-based techniques to better understand consumers. In conjunction, online panels have been able to provide market researchers with access to niche populations through deep profiling not available in traditional phone samples. However, certain populations, both consumer and business, remain under-represented in online panels. Thus, in order to reach the population under study, researchers occasionally must recruit respondents via telephone interviewer to complete the online survey instrument. This hybrid 'Phone-To-Web Recruit' approach allows researchers to bring web-based research methods to populations under-represented in online panels.

Phone-To-Web Recruiting poses several data collection challenges for market researchers including higher costs vis-à-vis traditional phone collection, low follow through rates and longer than usual fielding lengths. Although there is no single remedy to these disadvantages, experience and expertise in telephone data collection has taught us several valuable lessons.

1. Know Your Audience

Just as a comedian tailors her material to her audience, market researchers should understand how their target audience will respond to a Phone-To-Web Recruit effort. Not all populations are ideally suited to participate. Some populations have unusually low co-operation rates and others have limited access to computing technology or the internet. Low incidence segments can prove significantly more resource intensive when finding the population, screening for willing respondents and over-recruiting to account for drop-off.

2. Measure What You Treasure

The key to successfully fielding quantitative research is measuring and monitoring key performance indicators. In a traditional telephone survey, monitoring Incidence and Cooperation can provide an understanding of how the research effort is being handled. In a Phone-To-Web Recruit, you also need to monitor how effective your team is at converting recruits to completed interviews. Conversion Rate is defined as the number of surveys completed online divided by the total number of recruited participants. Low conversion rates can indicate an issue with process or it can signal a population factor, both of which can affect the overall success and feasibility of the study.

3. Perfect the Hand-Off

The most important moment in a Phone-To-Web Recruit is the hand-off. Unlike a traditional telephone study, recruiting to the web means that there will be a moment of disconnect between when the respondent agrees to participate and when the survey is actually completed. It is crucial to minimize this gap, because the greater the time lapse between the recruit and completion, the greater the likelihood the respondent will not complete the web survey. We rely on three proven techniques to reduce the disconnect:

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- **Instant Email Delivery**

An email containing instructions for completing the survey (including the survey link) should be delivered while the respondent is on the phone with the interviewer. The smaller the delay from commitment to participation, the more likely the respondent is to follow-through. The respondent's email address should be recorded and confirmed letter by letter.

- **Live Agent Support**

Agents should encourage the respondent to open their email, confirm receipt of the instructions and open the survey link. This can significantly mitigate issues in the instruction delivery process. Having a live agent on the line will help the respondent check spam filters, check for typos in the email address and facilitate a re-send if any issues do exist. Making sure the respondent has the materials necessary to complete the survey when you end the recruit call significantly improves the Conversion Rate.

- **Reminder Calls**

You are competing for the attention of the respondent in a world of distractions. The respondent will often forget about their decision to participate or misplace the instructions. A gentle reminder call should be made for those who have not completed within 24 hours, followed by a second call at 48 hours. During these calls the agent can re-send the survey instructions and re-confirm the respondent's willingness to participate. After 48 hours, the likelihood of completion drops sharply.

4. Cash is King

Provide a reward commensurate with the task. Our research has demonstrated that cash is king when it comes to incentivizing respondents. Cash and Gift Cards are more effective at incenting behavior than drawings, raffles and other prizes. Unlike traditional consumer studies, Phone-To-Web Recruiting generally involves the promise of an incentive since respondents are required to self-motivate and engage in additional activity after the recruitment call. Incentives, provided upon completion, provide the necessary nudge to ensure participation in the online portion of the study and recognize the time-value of getting online and participating in your research.

Phone-To-Web Recruiting can be a valuable addition to any researcher's toolbox. Although these recruits can be daunting, done correctly they bring the advantages of online research methods to hard to reach populations. By knowing your audience, measuring what you treasure, perfecting the hand-off and incentivizing appropriately, you can manage a successful recruit. Luckily, SSI has developed technology and project management solutions to make it easy. By following a few basic principles, a well-executed Phone-To-Web Recruit can turn an impossible research problem into a triumphant success.