

Facilitator Guide

Group # 3

Title: Interviewing Process

Audience for this Module:	Telephone Interviewers who will be doing Business to Business (“B2B”) interviewing and who are at the entry level or only some experience level
Goal of this Module:	<p style="text-align: center;">To train B to B interviewers to</p> <ul style="list-style-type: none"> • be able to identify the main sections of a questionnaire • have a working knowledge of the different types of questions they may encounter in B2B work • identify and understand instructions • understand their role in the process
Logistics: Materials, Room type/setup, Time needed, etc.)	<p style="text-align: center;">You will need:</p> <ul style="list-style-type: none"> • The CD that contains the PowerPoint presentation • Computers/monitors and/or Laptop and/or LCD projector to display PowerPoint presentation • Blackboard, flip chart or dry-erase board and appropriate writing implements • Live copy of a questionnaire to bring up on screen for use with Slide #38 • Copies of the Interviewer Code of Standards as a take-away document • Copies of Slide #64 for use during presentations • Enough highlighters for each interviewer <p style="text-align: center;">Room Set-up:</p> <p style="text-align: center;">This Module does not require special room set-up.</p> <p style="text-align: center;">Time Needed:</p> <p>As it is currently outlined and detailed, this module will take approximately 2 hours to complete.</p> <ul style="list-style-type: none"> - Slides 3-14 will take about 20 minutes - Slides 15-29 will take about 20 minutes - Slides 30-37 will take about 20 minutes - Slides 38-109 will take about 60 minutes
How to make the most of this Module	The presentation is customizable to meet with your company’s standard procedures and protocols, as long as it does not substantively change the content or nature of the training modules. You should view the full presentation to decide if you wish to customize any slides.
How to assess learning	Throughout the presentation, the slides contain questions that will assess the interviewers’ mastery of the material. If you wish to create a “mastery quiz”, you should do so using these questions as well as any others that you create.



Marketing Research Association

Group III: Interviewing Process

Facilitator Guide

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The Interviewing Process

OVERVIEW

The "Interviewing Process" presentation provides the following Interviewer training:

- ❖ Definition of important terms
 - Gatekeeper
 - Respondent
 - Questionnaire
 - ❖ The sections of the questionnaire
 - ❖ The types of questions that can be asked in each section of the questionnaire
 - ❖ Finding and following Interviewer instructions
 - ❖ The role Interviewers play in the interviewing process
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OBJECTIVES

By the end of this module the trainees will be able to successfully:

1. Identify each section of the questionnaire
 2. Identify/define the different types of questions
 3. Identify/explain Interviewer Instructions
 4. Define the importance of the Interviewer's role in the interviewing process
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MATERIALS

- The CD that contains the PowerPoint presentation
- Computers/monitors and/or Laptop and/or LCD projector to display PowerPoint presentation
- Blackboard, flip chart or dry-erase board and appropriate writing implements
- Live copy of a questionnaire to bring up on screen for use with Slide #38
- Copies of the Interviewer Code of Standards as a take-away document
- Copies of Slide #64 for use during presentations

Enough highlighters for each interviewer

TIMING

This module is customizable, as the screen shots and types of questions will vary from company to company.

As it is currently outlined and detailed, this module will take approximately 2 hours to complete.

Slides 3-14 “Terminology” and “The 5 Sections of the Interview”	20 minutes
Slides 15-29 Types of Questions You’ll be Asking	20 minutes
Slides 30-37 Additional Questionnaire Items	20 minutes
Slides 39-103 Interviewer Code of Standards	60 minutes

POINTS OF FOCUS

- Slide 3:** Before showing this slide, write the words ‘Gatekeeper,’ ‘Respondent’ and ‘Questionnaire’ on the dry erase board. Ask trainees to define each term and describe the role each plays in the interviewing process. Then, show slide and discuss.
- Slide 4:** Stop on this slide; ask trainees what they think occurs in each section of the questionnaire. For your use later, jot down the 5 terms. You’ll refer to this when using slides 5-13.
- Slides 5, 7,9,11 and 13:** For each of these slides, before proceeding to the next slide, ask the trainees what type of statements/questions would appear in each section of the questionnaire. Then show slide and discuss.
- Slide 15:** Pause to ask the trainees to answer the question, "What section do you think that would be?"
- Slide 17, 19, 21, 23, 26 and 28:** For each slide, before proceeding to the slide that explains the different types of questions, ask the trainees for examples. These examples do not have to be survey questions.
- Slide 27:** Ask the trainees, "**Why are these open-ended questions?**" Ask for additional examples of real-life questions that might be open-ended.

Slide 32-37: If you wish, you may change the examples in the gray text boxes, so that they match your company's programming. Delete what you do not need in the text box and type replacement text. You could also delete the gray text boxes and replace them with screen shots. Capture the screen shots using the 'print screen' key on your keyboard and paste them in the slide.

Extra Activity: Before proceeding to slide 38, you may want to bring up a live questionnaire from your company to identify the different sections, types of questions and interviewer instructions.

Slide 43: Ask trainee, "In what section of the questionnaire would the highlighted statement occur?" – The Screener/Screening. Ask, "What type of questions would we ask here?"

Slide 44: Revisit the answers given to the question, "What type of questions would we ask here?" Are they similar to the examples given on this slide? If not, discuss the differences and be sure trainees understand the correct type of question.

Slide 45: Ask trainees, "In what ways could you lead or bias the respondent?"

Slide 48: Ask trainees, "What do you think it means to respect the client's confidentiality? Why is this important?"

Slide 51: Ask trainees to explain why it would be important to read the questions as written and directed. "What would be the result if you did not?"

Slide 53 Put examples of questions on the board with changes in words and word order. Discuss with the trainees how the meaning of the question changes just by changing one word or changing the order of the words. Here are two examples of word changes you may want to use:

"Have you used cheese in the past week?" vs. "Have you eaten cheese in the past week?"

"What brand of coffee do you use?" vs. "What brand of coffee do you buy?"

Slides 58 thru 61 You may want to change these slides so that they match your company's procedures, especially slides 60 and 61. Slide 60 contains an example of what would appear on the screen. You may pull up a real-life example and review it. In that case, you would hide or delete this slide. If you wish to have an example on the

slide, you can change the text inside the gray box by placing your cursor at the end and backspacing the text and replacing it. You may also delete the gray box and replace it with a screen shot. Use your 'print screen' key to capture a screen shot and insert it in the slide. The lilac arrow is in a separate text box. Slide 61 may need to be modified to reflect your company's hardware/software.

- Slide 62** Ask the trainees, "What would keep you from getting full and complete answers from the respondent?"
- Slide 64** Ask trainees to identify the "don't know" response. Hand out paper copies of this slide and ask them to highlight the "don't know" responses (note: all responses are don't know responses).
- Slide 65** Refer to the printout of slide 64 given to the trainees. Ask trainees to write down what they might say in order to attempt to convert a "don't know" into a usable response.
- Slides 66 thru 69:** Compare the answers the trainees recorded on their printout to the responses used on each slide.
- Slide 70:** Discuss why it is important to clarify the "don't know" response only once, and then accept.
- Slides 71 and 72** You may need to change these slides to match your company's procedures. Slide 60 contains an example of what would appear on the screen. You may pull up a real-life example to review. In that case, you would hide or delete this slide. If you wish to have an example on the slide, delete what is not needed and insert applicable information. You may also delete the gray text box and replace it with a screen shot. Use your 'print screen' key to capture a screen shot and insert it in the slide.
- Slide 73, 75, 77, 79 and 81:** Pause at each slide to discuss the questions.
"Does this answer the question?"
"How would you respond?"
- Slides 87 thru 103** These slides address the handling of open ends. Throughout, discuss quality of responses, proper probing and clarifying and other key skills. Consider some role-playing in teams of 2 people with one person giving uninformative or vague responses while the other person attempts to elicit substantive responses. You can also do this with the instructor acting as the respondent as the trainees take turns trying to probe, etc.

**** Please note that an exam is also provided with the Facilitator Guide to assess learning from the course. ****

INTERVIEWERS' CODE OF STANDARDS

Interviewers:

- **will convey to respondents the importance of their opinions and participation.**
- **will interview only those people who qualify according to the client's specifications.**
- **will avoid leading or biasing respondents.**
- **will respect the client's confidentiality.**
- **will read the questions as written and directed.**
- **will record responses accurately.**
- **will make all efforts to get full and complete answers from respondents.**
- **will refrain from giving their opinions or making comments about a question, a respondent's answer, or the interview in general.**
- **will treat respondents, supervisors, managers and other interviewers with respect.**
- **will utilize supervisors' and managers' suggestions for improvement.**