

## Facilitator Guide

Group # 1

Title: The Basics of Interviewing “Professional Interviewer”

Audience for this Module:	New interviewers who are training to become skilled professional interviewers
Goal of this Module:	<p>To teach new interviewers:</p> <ul style="list-style-type: none"> <li>• the basics of market research</li> <li>• market research terminology</li> <li>• do not call issues</li> <li>• call dispositions</li> <li>• the detailed role of the interviewer</li> <li>• how the interviewer may inject bias</li> <li>• the confidentiality of project and client</li> </ul>
Logistics: Materials, Room type/setup, Time needed, etc.)	<p style="text-align: center;"><b>You will need:</b></p> <ul style="list-style-type: none"> <li>• The CD that contains the PowerPoint presentation</li> <li>• Computers/monitors and/or Laptop and/or LCD projector to display PowerPoint presentation</li> </ul> <p>Recommended for Exercises:</p> <ul style="list-style-type: none"> <li>• White/Chalk Board</li> </ul> <p style="text-align: center;"><b><u>Room Set-up</u></b></p> <ul style="list-style-type: none"> <li>• The PowerPoint portion of this training does not require special room set-up.</li> </ul> <p style="text-align: center;"><b>Time needed:</b></p> <p>About 2 hours &amp; 20 minutes for the PowerPoint Training.</p>
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.
How to assess learning	Along with questions and answers during the PowerPoint training, the group activity will allow you to assess learning while reinforcing the material from the module.



**Group I:  
“The Basics of Interviewing”**

**Facilitator Guide**

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## Introduction

The Basic Interviewer Training group is designed for new interviewers who are just learning the skills needed to become successful and professional telephone interviewers. Successful opinion and marketing research depends upon response rates as well as upon accurate data.

This Interviewer Training package consists of five PowerPoint presentations focused on obtaining the skills needed to gain respondent cooperation.

Areas explored are: the basics of interviewing, the history of marketing research and its impact, voice control techniques, assertive approaches to survey situations and effective use of rebuttals to gain respondent cooperation.

This Facilitator's Guide will provide:

- An overview of each presentation.
- Presentation goals for interviewers.
- Suggestions for individual and group participation and discussion.

All presentations can be used individually or in combination to train new interviewers or to enhance the skills in experienced interviewers.

Presentations included in this module:

### **“The Basics of Interviewing”**

This module provides a brief overview of the terms used in interviewing and the role and responsibilities of the telephone interviewer. Emphasis is placed on the importance of using techniques to collect verbatim statements, probe, clarify and avoid bias.

### **“History of Marketing Research”**

This presentation chronicles the history and development of the marketing research profession. Examples of how marketing research has influenced business, government, and daily life are presented. Standard research procedures and the importance of the interviewer's role in the research process are explained.

### **Voice Control/ “Sound Workshop”**

The most valuable tool that an interviewer has in achieving success in the job is his/her voice. Voice is an instrument that can establish rapport with the respondent and this module provides tips on using the voice to gain cooperation in the survey process. It includes examples of effective and ineffective uses of voice quality.

### **“Assertiveness Training”**

The key to success in telephone interviewing is often demonstrating assertiveness in gaining cooperation without being aggressive or too passive. This module provides interviewers with techniques on how to gain control of the conversation with the respondent in a positive and professional manner. The points involved are especially useful in the introduction sections of surveys.

### **“Refusal Rebuttal”**

As studies in effective introductions have shown, the single most important factor in successful conversion of respondent resistance is the interviewer’s ability to quickly match the right answer to the respondent’s objections. This module instructs interviewers in how to respond smoothly and easily to concerns and hidden objections to gain cooperation to start the surveys. Actual role-playing and examples of good answers are included in the content.

## **“The Basics of Interviewing”**

### **Overview / Purpose**

Training will make a difference to your company’s bottom line in the following ways:

- Training reduces turnover. Reduced turnover minimizes advertising, screening, hiring, training costs, supervision, monitoring, management, etc.
- Training reduces the amount of time spent supervising problems – instead you’ll be able to focus on quality improvement
- Training results in improved data quality to give back to your clients.

### **Presentation Goals:**

Upon completion of this course interviewers should understand:

- The basics of the market research process and basic terminology used by interviewers.
- Do Not Call issues and how to resolve them.
- Basic information on sampling and its importance.
- Understanding dispositions, handling of refusals and terminations, and the importance to the research process.
- The detailed role of the interviewer, from the screening process to the actual questionnaire.
- The need for quality assurance, validation and monitoring.
- How an interviewer can interject verbal and non-verbal bias.
- The confidentiality of the respondent and of the project.

## **Content Review**

### **Slides 2 - 3**

Review of the agenda and areas covered with the module.

### **Slides 4 – 7**

Definitions of Basic Terms – Marketing, Opinion and Research

Note: Source: MRA website – Career Guide

### **Slide 8**

Definition of “end user of research”

Note: Source MRA website – Career Guide

*Note that every industry is a potential user of research.*

### **Slide 9**

Definition of Full-Service Research Firms & Research Consultants

Note: Source MRA website – Career Guide

### **Slide 10**

Definition of Data Collection

Note: Source MRA website – Career Guide

Note: Data collection methods include interviewing of consumers and professionals, recruitment of respondents for focus groups or individual interviews and central location testing.

### **Slides 11-12**

Interviewer Job Description

Note: Source MRA website - Career Guide

### **Slide 13**

Definition of Respondent

Note: Source MRA website – Career Guide

### **Slide 14**

Skills Required of an Interviewer

With any administered questionnaire, interviewers need certain key skills in order to assure quality and completeness. These are largely communication skills, but also include general organization and efficiency skills.

### **Slide 15**

Two Basic Research Methods

*(Defined on next screen: Quantitative & Qualitative)*

### **Slide 16**

Quantitative

Note: Source – MRA website Career Guide

### **Slide 17**

Qualitative

Note: Source – MRA website

Example of Qualitative: In person – such as focus groups, one on one interviews, although the internet can be used.

### **Slide 18**

Research Process

- A basic overview of the research process
- Items 4 – 6 directly involve the interviewer

### **Slide 19**

Methodology

Note: Source – MRA website

### **Slide 20**

Survey Settings

- Setting in which an interview may be conducted (by an interviewer):
  - Central Location – respondent is pre-recruited to a location testing site.
  - On-Site – The interview is conducted where the respondent is most likely to be – in person – EX: a bank, a theme park, a golf course, etc.
  - Intercept – Conducted in a mall, store or some other set location. Screened on the spot and then taken to the facility.
  - Phone - Interview is done via phone, usually a central phone room.

### **Slides 21 – 23**

Sample: Who Do We Sample / Contact?

- Sampling Instructions:
  - On the phone – sample can be varied...
  - Purchased random digit dialing (RDD) sample
  - Target Sample - numbers drawn based on a targeted by specific criteria - EX: Hispanic targeted, a specific area, age, income, a list of hunters, etc.
  - A database of pre-agreed – often used for focus groups

### **Slide 24**

#### Accuracy Of Recording Dispositions

- Accuracy - outcome rates (e.g. response rates, refusal rates, cooperation rates, contact rates)
- Also helps guide the supervisor if an employee is having a qualified refusal problem / initial refusal problem

### **Slide 25**

#### Screening: Finding A Respondent

- Qualifications vary from study to study:
  - You may only interview eligible respondents for a study.
  - You may screen (and interview) only one person at a time.
  - No more than one per household.

### **Slide 26**

#### Refusals and Terminations

- The Interviewer must record result of this contact accurately.

### **Slides 27 – 28**

#### Basic Parts Of A Questionnaire

- **Screeners** are often based on demographics. These include:  
Age / gender / education / income / kids in household, etc.
- **Demographics** pertain to vital statistics such as age, income, education, and other personal characteristics of the respondent.

### **Slide 29**

#### Questionnaire Flow

Note: Use examples with the interviewers, showing how skip patterns move about and rotation happens. With so few paper surveys being done, skip patterns are usually not seen by the respondent. If a wrong response is entered, a skip pattern could be incorrectly triggered (or not triggered at all).

### **Slide 30**

#### Study Materials

- Materials include test product, concepts, show cards, tally sheets, quota forms, etc.

**Slide 31**  
Briefings

- Briefings are important on every project. It is the time that the supervisor or client can express the importance of the project.

**Slide 32**  
Verbatim

- Recording verbatim responses (in the case of open-ends) and reading the questionnaire word-for-word are critical for accurate analysis of data.

**Slide 33**  
Importance of Voice and Attitude

**Slide 34**  
Voice Skills - Basic areas to focus on

- A clear speaking voice is a key characteristic needed for interviewing, and there are techniques to make your voice easy to understand.
- What happens to an interview when the interviewer sounds bored or disinterested?
- What happens when an interviewer has a fast-paced or not easily understood speech?
- Respondents get frustrated. Frustration = Refusals or hang-ups or midterms
- An interviewer must be aware of voice strengths and weaknesses.
- Your voice will have a positive impact on the respondent, your productivity, and your morale.

**Slide 35**  
Voice Skills - Basic areas to focus on

- Tone Quality: Refers to the sound of your voice. Remember, nervousness affects your voice.
- Pitch and Inflection: Refers to the high and low sounds of your voice. Monotone voices, for example, are unpleasant to listen to. Inflection of words, phrases, or sentences help to clarify the meaning of what you are saying.
- Rate or Pace: Refers to whether you are speaking too fast / too slow. You may confuse the respondent. The rate you use while speaking must be varied and responsive.
- Tone: Refers to your voice (volume) level.
- Force: Refers to the power behind a word or phrase.

- Breathing: Refers to effective breathing control. This is the key to voice tone, pitch, rate force or stress, and volume.
- Diction: Refers to speaking clearly. No slurring or mumbling. Poor articulation is a matter of habit. Be attentive of your speech.
- Voice Variety: Refers to using all of the qualities of voice mentioned. Your voice can help clarify main points and makes the listener more attentive.

### **Slide 36**

#### Concentration Skills

- Learning to block out any distractions may be difficult for some people, but it can be done. The interviewer must dedicate all of his / her energy into the interview. Your ability to speak well without hesitation will improve. Concentration increases awareness, and awareness means you will be prepared.

### **Slide 37**

#### Enthusiasm

- Your enthusiasm is communicated to the respondent. Determination can be positive.
- But, enthusiasm and determination may be negative as well. You must not be too forceful or aggressive.

### **Slides 38 – 39**

#### Good Listening Skills / Presence

- Listen for responses to questions – record accurately
- Listen for how the respondent feels about the question, the interview or the survey as a whole.

#### **Listen for:**

- **Hesitation due to fear, nervousness, or distrust**  
Reassure the respondent with a calm, soothing tone. Tell the respondent that the study is important. Stress the confidential nature of the study.
- **Boredom and distraction accompanied by disinterest**  
Be calm, confident, and soothing. If the respondent is determined to be irritated because they are too busy – schedule a callback. Never sound hesitant.
- **Hostility**  
Be firm but friendly. Be confident – never become harsh. Be understanding. Make respondent feel important / actively listen. Repeat phrases back – to allow time to record during open ends.

## FACTS ABOUT LISTENING

- Communication may be received, but much of the information is screened out (or altered) by the receiver. What you say is not necessarily what the listener gets.
- We have a strong cultural tendency to tune out. Our minds go forward (What do I say next? How do I defend myself? What shall I have for lunch?), or in reverse (Did I turn the car lights off? Did I get an e-mail back from...?). (The movie "What Women Want")

## THINGS YOU CAN DO TO IMPROVE YOUR LISTENING SKILLS

- Make being a better listener a priority.
- Monitor your own listening: do you follow the supervisor when they are briefing, or do you tune him/her out? Try to understand why you tune out when you do.
- Many times, we immerse ourselves in our own analysis of what is heard: focus instead on comprehension.
- Become an Active Listener: listen with your ears, mind, head and heart.
- Active listening involves not only following along with the persons speaking, but letting him or her know you are tracking their message. (Confirming your comprehension of one's communication doesn't automatically mean you agree with what they have expressed). (How do you do that?)

**"Seek first to understand, then to be understood"**

### **Slide 40**

#### Types of Questions

- Leads into next screen – Closed End – a few examples will be given

### **Slide 41**

#### Closed End Questions

##### **Example Formats:**

Yes /No  
Rating Scales  
Rank Ordering  
Sorting  
Multiple Choices

- The interviewer is required merely to indicate the respondent's answer from the provided choices.

- Closed-ended questions always need to be read by the interviewer with even emphasis and inflection.
- The questionnaire and instructions should indicate whether and when to read or not read pre-listed responses.

NOTE: Give examples of close-ended questions.

### **Slide 42**

Open End Questions

Note: Source - MRA Website

- **Verbatim** - where every word, including repeated phrases and irrelevant comments, are written down or recorded. Some questions have both close-end and open-end responses.
- **“Other: Specifies”**

Open-end questions may be more challenging because, since the answers are not pre-coded, the interviewer needs to be trained on extracting the information (probing and clarifying).

Open ends add a substantial cost to a study because of all the work that needs to be done AFTER the interviewing has been completed (developing codes, coding them and for data processors to enter the numerical codes into the data set).

Often the researcher cannot anticipate what the responses to a specific question may be, therefore, respondents are asked the question and the interviewer records the answers verbatim.

NOTE: Give examples of Open-ended questions.

### **Slide 43**

Probing

Note: Source - MRA Website

- Probing is a technique used to complete an answer and is done after a statement has been clarified, fully.
- Probing stimulates the respondent to think more deeply and to make comments in addition to those already given. You will usually have to clarify the answer to a probing question.
- Non-leading questions are used in probing, so that no ideas are suggested to the respondent.
- When probing, you always want to get as much information as possible and to do this, you will need to ask for it in an encouraging way. Words such as “WHAT ELSE,” “WHAT OTHER,” “TELL ME MORE” and “I’D LIKE TO HEAR MORE,” lets the respondent know that you’re

interested in everything they have to say and encourages them to make additional remarks.

- Never ask “ANYTHING ELSE?” because it invites a “NO” answer by implying that you have enough information.

#### **Slide 44**

Probing Symbols (vary by company)

Note: Company procedures should be stated here.

Explain the use of the probes listed.

- Be creative – not boring or badgering
- **PROBES** are additional questions designed to elicit more specific meaning from respondents after they have initially answered an open-ended question. Unidentified pronouns, slang words or phrases, and many adjectives often require clarifying. Probes will usually be specified in the questionnaire instructions for each study or type of questionnaire

#### **Slide 45**

Clarification - Clarify

- Clarifying is a technique that is used to obtain an explanation of vague answers.
- A response needs to be clarified if it isn't clear what the respondent means *or* if the answer is too general.
- Often, people use words that have different meanings.

For example, when speaking of cereal, someone can say, “It was good” and be referring to a number of topics: taste, appearance, nutritional value, texture, or price.

The most effective way to get a further description is to ask the respondent to clarify or explain the vague words they used. Such words are called “key words” because their meaning is the “key” to “unlocking” or understanding opinions.

#### **Slide 46**

Symbols used in Clarifying

Note: Company procedures should be stated here.

- Explain the use of the clarification listed.
- Be creative – not boring or badgering
- An effective Clarification will be one that you simply use the respondent's words to ask him to clarify. That is why it is important to listen well.

### **Slide 47**

#### Examples of Key Words

- A few examples of words that need to be clarified for their use

### **Slide 48**

#### Recording Open Ends

- Check your spelling
- If respondent speaks too fast, ask him/her to repeat and explain their response.
- If written by hand, write legibly.
- Make sure the full response is recorded / probed and clarified before continuing.
- Use the “marks” that your company or your client wish.

### **Slide 49**

#### Affect the Quality of Information?

- O/E's need to be coded by researchers once the survey is completed. This process begins by developing codes, which is a way of categorizing.
- Categories are assigned a number. These numbers in turn become the numeric codes.
- Once the codes are developed, researchers begin to code the responses, which involves assigning a number to each one of the responses corresponding to the category they best fit.
- A single O/E may contain many codes (especially when the probing by the interviewer was done correctly).
- An interviewer that does a good job of probing and clarifying, ends up gathering “codable” responses.
- A “Codable” answer is an answer that (as written) accurately reflects the thoughts and ideas of the respondent.

### **Slide 50**

#### Quality Improvement

- Interviewers that want to do the best possible job on O/E's should practice these techniques.

### **Slide 51**

#### Probing and Clarifying Practice

*Note: Take time to do hands-on exercises using a white board or some other display, to practice probing and clarifying. Point out improper and proper use. Round Robin techniques are often used, having the interviewer trainees evaluate each other.*

*Practice with the Interviewers - take time to make sure there is an understanding of the full process and techniques used*

- *What do you like about your favorite flavor of ice cream?*
- *What do you like best about working at \_\_\_\_\_ Service?*
- *Why do you listen to XYZ radio station most often?*
- *What do you like about the anchor on station ABC?*
- *What do you like about living in San Antonio?*
- *Why did you choose that pattern of dishes?*
- *Why do you shop at CDE most often?*
- *Why did you purchase the XYZ brand of bath soap?*
- *What restaurant do you eat at most often? Why?*
- *What channel do you watch most often for the weather? WHY?*

### **Slides 52 - 54**

Bias

- People are sometimes easily influenced to behave by what they believe others expect of them.
  - Remember, there are no right or wrong answers
- The interviewer must take every caution not to allow for their personal opinions or thoughts to be displayed during the interview process.

### **Slides 55 - 56**

Quality Assurance & Validation

Note: Source MRA Website Glossary

### **Slides 57 - 59**

Monitoring

Note: Source MRA Website Glossary

- Assuring the quality of the project.
- Constructive feedback for the interviewer.

*A few of the traits of that a monitor will be looking for are listed on the slide.*

### **Slides 60 – 62**

Do's and Don'ts

## **Slide 63**

### Elements to Successful Data Collection

- **CONSISTENCY AND CONTROL**

In quantitative studies, in particular, it is critical that each interview be conducted the same way; e.g., using the same:

Verbatim questions  
Clarifications and probes

Interviewers may communicate **biases** through deliberate or unintentional comment, inflection, or in the case of in-person interviews, facial expressions.

- **ETHICS:**

**Respondent selection:**

It is never acceptable to interview family, friends, neighbors, or cooperative respondents recently interviewed for another client or project. Every sampling unit -- every telephone number, every household, or every qualified shopper in a mall -- should be chosen in the manner outlined in the sample instructions, without interviewer selectivity.

**Confidentiality:**

Interviewers must respect the privacy and confidentiality of both clients and respondents.

**Respect:**

Respecting the respondent's right to refuse to participate in a marketing and opinion research study is also important.

**Honesty:**

The interviewer should never misrepresent the respondent, the client, or his/her work. This includes: not fabricating information, not accepting a respondent for an interview who does not truly meet the screening criteria, and not recording responses that are not accurate.

**Following instructions**

Interviewers are trained to not make assumptions, interpretations, or to alter procedures for their own comfort or convenience.

This includes everything from following the exact wording of the questionnaire to handling and protecting important study materials like test products (the product being researched) *and* concept boards (descriptions or pictures of products/ services being tested).

## **Slide 64**

### Confidentiality

*Note: Reviewing company procedures regarding securing a client's confidentiality and a respondent's personal information is important. Many states have specific laws that must be followed.*

## **Slides 65 – 67**

### Respondent Cooperation / DNC laws and “Patent” Responses

- Steps can be taken to increase the cooperation of potential respondents.
- Assure potential respondents that you are not selling anything but merely asking the respondent's opinion.
- Be friendly. Interviewers can assure potential respondents of the value of their opinion if they act in a friendly, professional manner.
- Patent responses – keep a copy close by – learn and be comfortable with usage

## **Slide 68**

### Industry Organizations

*Note: Important for a new interviewer to understand that the position he / she has is part of a global industry.*

## **Slides 69 – 70**

### On the Job Training

*Note: Important that the company provide OTJ training. Allows the interviewer to gain in experience and begin to gain in confidence.*

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