

Facilitator Guide

Group # 8

Title: Supervisor Training “Coaching On Other Performance Measures”

Audience for this Module:	Supervisors and supervisors-in-training.
Goal of this Module:	<p>Upon completion of this course, supervisors will:</p> <ul style="list-style-type: none"> • Understand two important measures of interviewer performance, CPH and Refusal Rage, and how to help interviewers improve these measurements. • Be able to coach interviewers on the proper probing techniques. • Be able to communicate the importance of reading verbatim to the interviewer, and how this solves bias and leading problems.
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 <p style="text-align: center;">Room Set-up:</p> <ul style="list-style-type: none"> • White Board/Dry-Erase Board, chalk board, or flip chart <p style="text-align: center;">Time needed: About 1 hour 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 substantially change the content or nature of the training modules.
How to assess learning	Questions and answers during the PowerPoint training. Exercise time may vary.



Marketing Research Association

Group VIII
“Coaching On Other Performance Measures”

Facilitator Guide

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Coaching On Other Performance Measures

- CPH
- Refusal Rate
- Callbacks
- Verbatim/Bias/Leading
- Probing & Clarifying

Overview

“Coaching on ‘other’ performance measures” presents:

- What CPH means, how it is used, and why it is important to an interviewer.
- What a refusal rate is and how to help interviewers avoid and combat refusals.
- The proper information an interviewer should gather for a callback.
- The importance of reading questions verbatim and how this helps avoid bias and leading.
- How to help an interviewer with probing and clarifying.

Objectives

Upon completion of this course, supervisors will:

- Understand two important measures of interviewer performance, CPH and Refusal Rate, and how to help interviewers improve these measurements.
- Be able to coach interviewers on the proper probing techniques.
- Be able to communicate the importance of reading verbatim to the interviewer, and how this solves bias and leading problems.

Points of Focus

Slides 3-11

- Coaching on CPH.
The first section deals with what CPH means and how it is used. The key points to make are:
 - Give the definition of CPH. $CPH = \text{number of completes} / \text{hours worked}$.
 - Interviewers can compare their personal CPH with the expected CPH for a project.
 - Dialing speed and good interviewing habits can positively affect an interviewer's CPH.
 - CPH is just one of many tools supervisors will use to evaluate the effectiveness of an interviewer.
 - Give examples of how CPH may be used for evaluation purposes to make decisions on raises and bonuses.

Slides 12-18

- Coaching on Refusal Rates.
This section discusses refusal rates. The key points are:
 - The refusal rate is calculated by dividing the number of refusals by the number of connected calls.
 - Refusals can affect the representation/validity of a survey.
 - Make sure the interviewers are prepared for refusals. A quick and on-target refusal rebuttal is often very effective.
 - Refusals are not personal. Respondents are objecting to the call, not the interviewer. Encourage the supervisors to recount some funny or memorable refusals they have encountered.

Slides 19-22

- Coaching on Callbacks.
This section discusses callbacks and the information needed when scheduling a callback. The key point is:
 - Respondent name, phone number, date/time to callback, and any notes are valuable information to set up a callback.

Slides 23-29

- Coaching on Verbatim/Bias/Leading.
This section deals with reading questions verbatim and how this avoids bias and leading of the respondent. Key points are:
 - The supervisors should understand what reading verbatim means. Reading everything exactly as it is written, leaving nothing out and adding nothing. It is extremely important the supervisors and interviewers understand every respondent should hear the questions read in the same way.
 - Bias and leading can result when the interviewer does not read verbatim. Have supervisors think of examples of each.

Slides 30-35

- Coaching on Probing and Clarifying.
This section covers probing and clarifying. The key points to make are:
 - Give definitions of probing and clarifying, make sure the supervisors understand when and how to do each.
 - Probes should always be neutral or positive. Give examples.
 - A probe should not allow a respondent to answer “Yes” or “No” easily.
 - If appropriate, supervisors should make sure the interviewers have a list of suggested probes at their desk.
 - Have the supervisors practice asking open-end questions and demonstrate how to probe appropriately.

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

Activities & Suggestions

- Gather “stories” to be used in each section of the training.
- Have math problems ready to use in training the calculations of CPH and Refusal Rate.
- ***Coaching Other Performance Measures*** in-class activity
 - Use this hand-out as a measurement of comprehension for this training presentation.
- ***Coaching Other Performance Measures*** take-away hand-out
 - The take-away document to be given to the participant at the end of this training presentation.

Coaching On Other Performance Measures Activity

Answer each question below.

1. CPH is calculated by _____ the _____ of _____ by the number of _____.
2. Jo Anne Interviewer worked 37 hours this week and completed 58 surveys. What is her CPH?
3. Refusal Rate is calculated by dividing the number of _____ by the number of _____.
4. Jim Interviewer has interviewed for 2 hours and has 125 connected calls. 49 of those have been refusals. Calculate Jim's refusal rate.
5. Callbacks should always include 3 important pieces of information. They are:
 1. _____
 2. _____
 3. _____
6. Define the word verbatim.

Not following this definition can lead to _____ and/or _____.

7. Asking a respondent to explain an answer that was already given, or to fit their answer into a pre-coded list or scale is _____?
8. Asking a respondent for more detailed information is _____?
9. Bill Interviewer has worked 3 shifts this week and dialed on 2 different studies. On the first job he worked 12 hours over the 3 shifts and has completed 7 surveys. On the second job he has completed 14 surveys for 8 hours. In total he has connected 239 calls, with 69 of those being refusals. Calculate the following.

Job 1 CPH:

Job 2 CPH:

Overall Refusal Rate:

10. Complete the following statement:
- More _____ = more _____ for a _____.
11. Refusal Rate can affect the _____ of the survey's sample.
12. When asking for a callback, Interviewers should always use a _____ approach.
13. Reading every survey verbatim, exactly the same way so all respondents hear the same questions in the same way, will preserve the _____ of the data.
14. Circle the letter(s) that represent good probes.
- Can you tell me about that?
 - You mentioned _____; tell me more about that.
 - Is there more you can tell me about that?
 - What else can you tell me?

Answer Key

- dividing/number/completes/hours/worked
- 58 completes divided by 37 hours = 1.57 cph
- refusals/connected/calls
- 49 refusals divided by 125 connected calls – 39.2% refusal rate
- The name of the respondent / date and time to callback / any applicable notes
- Reading each question exactly as written, leaving no words out and adding no additional words.
bias / leading
- Clarifying
- Probing
- Job 1 cph – 7 completes/12 hours = .58 cph
Job 2 cph – 14 completes/8 hours = 1.75 cph
Overall Refusal Rate – 69 refusals/239 connected calls = 28.9% Refusal Rate
- dials / chances / complete
- representiveness
- positive / assumptive
- integrity
- b / c

COACHING OTHER PERFORMANCE MEASURES

CPH

- Completes divided by hours worked
 - Compared to what is expected
 - More dials – more chances for completes
- Good interviewing skills lead to high completes per hour

REFUSAL RATE

- Refusals divided by connected calls
- Converting refusals adds to validity & representativeness of the sample
- Converting refusals gives someone the chance to voice their opinions
- Refusals are not personal – object to the call, not the interviewers

CALLBACKS

- Always use a positive assumptive approach when asking for callbacks
- Should include respondent name, date and time of callback, applicable notes

READING VERBATIM

- Reading exactly as written, leaving no words or adding no additional words
- Avoids bias and leading the respondent
- Preserves the integrity of the data

PROBING & CLARIFYING

- Probing – asking a respondent for more detailed information
- Probes should be neutral and positive
- Probes should not allow the respondent to answer 'Yes' or 'No'
- Clarifying – asking a respondent to explain an answer already given or to fit their answer into a pre-coded list or scale
- Probing & Clarifying are important to collecting full and accurate data