

Facilitator Guide

Group # 4

Title: Supervisor Training “Evaluating Introductions”

Audience for this Module:	Supervisors and supervisors-in-training.
Goal of this Module:	The goal of this module is to teach supervisors how to monitor and assess the delivery of survey introductions in preparation for giving interviewers feedback on their performance.
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 • Recommended: Taped examples of interviews <p>Recommended for Exercises:</p> <ul style="list-style-type: none"> • Print out copies of hand-outs <p>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:</p> <p>About 1 hour for the PowerPoint Training; exercise time may vary.</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 POST -PowerPoint activities will allow you to assess learning while reinforcing the material from the module.



Marketing Research Association

Group IV: “Evaluating Introductions”

Facilitator Guide

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Evaluating Introductions

Overview

Once interviewers have been trained in effective delivery of survey introductions, there must be a method in which to evaluate their performance of that delivery. Once Supervisors have been trained in how to monitor, assess performance and provide feedback on survey introductions delivery, there must be a means to evaluate the Supervisor's performance.

This module provides the structure to perform evaluation of both the interviewer's and the supervisor's performance in the introduction delivery area.

Objectives

The goal of this module is to teach supervisors how to monitor and assess the delivery of survey introductions in preparation for giving interviewers feedback on their performance.

This module provides guidelines to ensure that supervisor assessment is:

- objective
- fair
- detailed
- helpful

Supervisors will learn how to use physical and aural observations to determine if the introduction was delivered in the most effective manner and within procedure.

Each Supervisor will have met the goals of this module if they are able to complete an evaluation of the introduction in an objective manner against each element described in the evaluation.

Points of Focus

The session leader can start the module by asking supervisors for their lists of how they would evaluate the interviewer's delivery of the survey introduction.

- This opening exercise can be in the format of a group participation, where the supervisors volunteer their opinions of what elements or components make up a good introduction.
- The session leader should note or list these elements on the board or flip chart.
- The trainer should continue asking for elements of a good introduction until most of the module's main points have been mentioned.

Next, the trainer should ask supervisors to volunteer what they think are the elements of a good evaluation. How should a supervisor judge whether or not an introduction is proper, what criteria should the supervisor use? In this give-and-take section, the trainer should be trying to draw out the ideas that an evaluation should be:

- Observable, facts about performance
- Not judgments or personal value
- Objective
- Neutral
- Balanced (see correct and ineffective examples)
- Consistent
- Based on measurable or written procedures
- Noted in writing, not remembered mentally

After these two participation exercises, the trainer is ready to begin the module.

Slides 1-10

The first 10 slides should be presented up to the slide "What to look for..." (slide 10).

- The trainer can ask the supervisors for their reaction to the points in the opening slides, and whether or not they agree with those components of a successful introduction.
- This is also a good place to ask supervisor what other delivery techniques they found useful and effective when they were interviewers.
 - During this opening section, the session leader should begin to get a feel for the supervisory trainees who mostly concentrate on the technical aspects of the introduction- these individuals will need more work in the delivery style assessment area. Many supervisors prefer to dwell on the technical comparisons to procedures, because that kind of evaluation is cut and dry (and easy to follow). Since the purpose of this module is to teach supervisors how to evaluate the non-technical or "soft" aspects of monitoring introductions, the trainer will have to

take extra time and emphasis with those trainees who only want to critique the technical aspects.

Slides 11-24

The elements of introductions are reviewed. Describe and explain each element to the supervisors:

The elements consist of

- volume
- enunciation
- inflection
- rapport
- flexibility
- assertiveness
- good listening

Slide 25

At this point, provide the supervisors with copies of the evaluation form for interviewer's introductions.

- Review each element of evaluating the interviewer style with the class, explaining the rating system.

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

Activities & Suggestions

In preparation for this training module, the trainer may collect taped examples of interviews where the elements of the survey introduction were done correctly. Be careful to obey all applicable consent, privacy, and notification laws if you intend to record live interviews.

For examples of the types of scenarios you may want to record, the tape excerpts can include portions of introductions where interviewers:

- spoke too quickly or too slowly, as well as spoke at the same pace as the respondent
- spoke too loudly and abruptly, or too softly so that the respondent kept asking what was said, in addition to an example where the volume was just right for the respondent and the listener
- slurred many of the words or ran them together, as opposed to speaking each word clearly and distinctly
- delivered the introduction in a mechanical or stilted manner, versus a conversation style. *This section can also include examples of too casual and personal a conversation as well*
- sounded bored, remote, tired, and also where the interviewer sounded energetic, enthusiastic and confident
- sounded overly enthusiastic, exaggerated, or false
- spoke in monotone without inflection, and cases where the interviewer spoke with inflection, emphasis on certain words, and variety in tone
- sounded cold and distant, as well as friendly
- were aggressive (pushed the respondent without listening or answering objections) and pushy, then passive and timid (did not offer any answers to refusals); had just the right level of assertiveness, persisted through at least two answers to refusals that were on target and acknowledged the respondents feelings
- demonstrated lack of rapport; lacked empathy or understanding, never acknowledged feelings or concerns, used inappropriate responses or humor, interrupted and didn't listen. *Include examples of strong rapport; empathized, listened without interrupting, responses addressed (real or underlying), appropriate humor, not too much personal talk*

Listen to the tapes and rate the areas together as a class. Use the evaluation form.

Arrange for live monitoring sessions to be held during the training module in order to assess the supervisor's understanding and execution of the evaluation principles.

- Listen to the first few surveys together as a class and rate them together so that the supervisor can see the way to rate each element according to what was learned in class.

- Listen to 2 or 3 more surveys, but have the supervisors complete evaluation forms individually.
- Discuss these evaluations as a class, focusing on the deviations from the expected rating or how the rest of the class rated each element.

If the trainer finds a supervisor who is not rating the elements according to procedure, arrange one-on-one monitoring and review of the principles.

Evaluation Forms

Attached are the two forms that are covered in this training module.

- Interviewer Introduction Delivery Assessment
- Assessment of Supervisor Introduction Feedback

Both use the same evaluation scale as detailed below:

- **CE – Consistent Execution**
 - This rating is assigned when execution is 100% accurate/correct.
- **IE – Inconsistent/Incorrect Execution**
 - This rating is assigned when there are very few errors. For example - the interviewer may not read one question verbatim or may assign a “don’t know” incorrectly.
 - This rating is also assigned when monitoring a brand new interviewer who is still in the learning phase.
- **NI – Needs improvement**
 - This rating is assigned when there are many errors. For example, clearing only one dk out of 5 in a row. Clearing 1 refusal out of 3. Not reading verbatim as directed.
 - This rating is also assigned when dealing with a more experienced interviewer who has documented past training and success in the area being rated.

Had to repeat

Just right

3. Uses appropriate volume:

Too slow

Asked to speed up

CE **IE** **NI** **NA**

4. Uses appropriate enunciation:

Clear

Slurred

CE **IE** **NI** **NA**

5. Uses appropriate inflection:

Monotone

Sing-song

Varied

CE **IE** **NI** **NA**

6. Uses appropriate level of energy/enthusiasm:

Enthusiastic

Bored

CE **IE** **NI** **NA**

7. Uses appropriate level of assertiveness:

Timid

Hesitant

Tentative

CE **IE** **NI** **NA**

8. Uses smooth phrasing:

Too slow

Asked to speed up

CE **IE** **NI** **NA**

ASSESSMENT OF RAPPORT

1. Appropriately responsive to respondent comments:

CE **IE** **NI** **NA**

2. Flexible/able to adapt to situation:

3. Uses humor where appropriate:

OVERALL COMMENTS:

CE = Consistent Execution IE = Inconsistent Execution NI = Needs Improvement NA = Not Applicable

ASSESSMENT OF SUPERVISOR INTRODUCTION

Supervisor _____ Date: _____ Survey#: _____

Interviewer: _____

DID THE SUPERIVOSR:

	CE	IE	NI	NA
1. Cover all the technical points of the survey?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Ask the Interviewer for their opinion to start?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Ask questions rather than lecture?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Encourage the Interviewer towards self-evaluation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How? _____

	CE	IE	NI	NA
5. Praise the Interviewer for the good points of performance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Provide a private comfortable setting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Deliver feedback in a timely manner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Listen without interruption?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Give concrete examples?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Explain procedures correctly?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Explain why a procedure exists/needs to be followed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Show how to do a technique, not just to do it?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Gives the WIFM* to the interviewer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*WIFM = "what's in it for me?" How the Interviewer benefits by following the procedure.

CE = Consistent Execution IE = Inconsistent Execution NI = Needs Improvement NA = Not Applicable

SUPERVISOR'S COMMUNICATION STYLE:

1. Adjusted to the Interviewer's communication style?

- | | |
|--|---|
| <input type="checkbox"/> Positive | <input type="checkbox"/> Negative |
| <input type="checkbox"/> Objective | <input type="checkbox"/> Subjective |
| <input type="checkbox"/> Neutral | <input type="checkbox"/> Judgmental |
| <input type="checkbox"/> Concrete/specific | <input type="checkbox"/> Vague |
| <input type="checkbox"/> Conversational | <input type="checkbox"/> Lecture/Dictatorial |
| <input type="checkbox"/> Dialogue | <input type="checkbox"/> Monologue |
| <input type="checkbox"/> Respectful | <input type="checkbox"/> Condescending/demeaning |
| <input type="checkbox"/> Adult-to-adult | <input type="checkbox"/> Parent-to-child/Teacher-to-student |

CE	IE	NI	NA
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

NON-VERBAL COMMUNICATION STYLE

1. Supervisor's non-verbal communication style:

- | | |
|--|--|
| <input type="checkbox"/> Open/relaxed | <input type="checkbox"/> Threatening/tense |
| <input type="checkbox"/> At same level | <input type="checkbox"/> Towering over Interviewer |
| <input type="checkbox"/> Smiling/nodding | <input type="checkbox"/> Frowning/shaking head |
| <input type="checkbox"/> Eye contact | <input type="checkbox"/> No eye contact |

CE	IE	NI	NA
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

DID THE SUPERVISOR'S WRAP-UP INCLUDE:

1. Only two or three areas to work on?
2. Development of goals by Interviewer?
3. Suggestions from Supervisor?
4. Confidence in Interviewer's ability to do the job?
5. Agreement from the Interviewer?
6. Documentation

CE	IE	NI	NA
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OVERAL COMMENTS:

CE = Consistent Execution IE = Inconsistent Execution NI = Needs Improvement NA = Not Applicable