

Facilitator Guide

Group # 1

Title: The Basics of Interviewing “History of Marketing Research”

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"> • The differences between telemarketing and marketing research. • Reasons marketing research is used in business and government. • History of marketing research. • Marketing research’s impact on business and government. • Marketing research process and procedures. • Interviewer’s role in the marketing research process.
Logistics: Materials, Room type/setup, Time needed, etc.)	<p>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>Recommended for Exercises:</p> <ul style="list-style-type: none"> • White/Chalk Board • Print out copies of quiz for all participants <p style="text-align: center;"><u>Room Set-up</u></p> <ul style="list-style-type: none"> • The PowerPoint portion of this training does not require special room set-up <p style="text-align: center;">Time needed:</p> <p>About 2 hours for the PowerPoint Training; about 30 minutes for the POST-PowerPoint training for a group of up to 12 interviewers. A larger group may take more time.</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, activities will allow you to assess learning while reinforcing the material from the module.



**Group I:
“History of Marketing Research”**

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.

Interviewer Training – History of Marketing Research

Overview

“History of Marketing Research” presents the following:

- The differences between telemarketing and marketing research.
- Reasons marketing research is used in business and government.
- History of marketing research.
- Marketing research’s impact on business and government.
- Marketing research process and procedures.
- Interviewer’s role in the marketing research process.

Presentation Goals:

Upon completion of this course, interviewers should:

- Understand the differences between telemarketing and marketing research.
- Know the reasons why survey research is used in business and government.
- Recognize key events in the history of marketing research.
- Identify how survey research benefits business and government.
- Understand the marketing research process and survey procedures.
- Understand the interviewer’s role in the marketing research process.

Key Points Presented:

- Common misconceptions about the differences between telemarketing and marketing research in the form of an interactive quiz.
- Examples of how survey research is used by business and government.
- Key events in the marketing research profession.
- Examples of how marketing research has influenced business, government, and society.
- The marketing research process and survey procedures.
- The “Key Players” in marketing research: client, interviewer and respondent, *and* their role in the research process.
- How research questionnaires are developed.
- How a targeted sample is obtained.

Slide Content:

Slides 3-8

Group activity:

Common misunderstandings about the differences between telemarketing and marketing research are presented in the form of an interactive quiz.

Each slide presents statements that are true for either telemarketing or marketing research. Ask workshop participants which statements are true for telemarketing and which ones are true for marketing research. Discuss what the differences are.

Key Points Covered:

Marketing Researchers

- Elicit information from the public. The information collected provides companies with the public's opinions of products and services or social and political issues.
- Can call before 8am and after 9pm.
- May send unsolicited faxes.
- Are exempt from the Federal regulations regarding the "National Do Not Call" lists.

Telemarketers

- Solicit to raise funds or sell goods and services.
- May not call before 8am or after 9pm.
- May not send unsolicited faxes.
- Must comply with the Federal regulations regarding the "National Do Not Call" lists.

Slides 9-15

Provides reasons marketing research is used by business and government.

Key Points Covered:

- Reduces risk of making wrong decisions.
- Provides companies with a "picture" of their customers and their competitors' customers.
- "Weighs" the public's perception of a particular issue.
- "Reflects" the public's concerns, beliefs and values.
- Helps determine where tax dollars are needed.

Slides 16-30

“Red letter dates” and key events in the growth of the marketing research profession are presented. Included are examples of how WWII, changes in economy, and advances in technology resulted in major growth of the profession.

Key Points Covered:

- “Red letter dates”/Key events in the development of the marketing research profession.
- Growth of the marketing research profession before and after WWII.
- The marketing research profession today.
- Different methods of collecting marketing research data.

Slides 31-39

Highlight how marketing research has affected what products and services are available in the marketplace today. Examples of products and services resulting from marketing research are presented.

Suggested group activity:

Have workshop participants brainstorm other products and services resulting from marketing research.

Slides 40-62

The marketing research process is explained.

Key Points Covered:

- The “key players” and their roles in marketing research:
Client
Respondent
Interviewer
- What clients want to know by using marketing research.
- How a marketing research questionnaire is designed.
- The 10th Man Rule of questionnaire development.
- How respondents are selected for the research study.
- The importance of following research procedures for the validity of the data collected.
- Key ways to encourage respondent cooperation in the research process.

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

Test Your Understanding of Marketing Research / Quiz

1. Complete These Statements:

- The person we interview is called the _____.
- The _____ is the link between the client and the respondent.
- All marketing research studies begin and end with the _____.
- _____ are “elicitors” and _____ are “solicitors.”

2. When did the need for marketing research become most apparent?

- During the prehistoric age
- During the Revolutionary War
- After World War II

3. Name two ways in which marketing research benefits companies and organizations.

4. Name two safety items that came about due to opinion or marketing research.

5. Define the following:

- “Sample Selection”

- “10th Man Rule”

6. Interviewer’s Role

- There are several things you can do to assure that we provide our clients with a quality product....name at least 4.

- **Answers to Quiz:**
- **Completed Statements.**
- The person we interview is called the RESPONDENT.
- The INTERVIEWER is the link between the client and the respondent.
- All marketing research studies begin and end with the CLIENT.
- MARKETING RESEARCHERS are “elicitors” and TELEMARKETERS are “solicitors.”

2. When did the need for marketing research become most apparent?
After World War II

- 3. Ways marketing research benefits companies and organizations.**
- Reduces companies’ risk of making wrong decisions
 - Provides a “profile” of their customers so they can better serve them
 - Shows the public’s assessment of a particular issue

- 4. Safety items that came about due to marketing or opinion research.**
- Car seats for children
 - Smoke detectors
 - Child-proof medicine bottles
 - Bicycle helmets
 - Warning labels on products
 - Plastic containers instead of glass in bathrooms

5. Definitions of Sample Selection and the 10th Man Rule.

- “Sample Selection”
- The process of selecting people to participate in the study.
- “10th Man Rule”
- Used to explain why questions are worded the way they are.
- Although 9 out of 10 people may understand the question, it is also important that the 10th person also understands.

6. The Interviewer’s role/ key things to do to assure quality marketing research results.

- Interview only those people who qualify.
- Respect client confidentiality.
- Read questions as written.
- Record responses accurately.

- Refrain from giving your own opinions or offering comments.
- Avoid leading or biasing the respondent.
- Project an enthusiastic and confident tone.
- Speak clearly.
- Convey to the respondents the importance of their opinions and participation.