

Facilitator Guide

Group # 1

Title: The Basics of Interviewing “Refusal Rebuttal”

Audience for this Module:	New interviewers who are training to become skilled professional interviewers
Goal of this Module:	<p>Upon completion of this course, interviewers should successfully:</p> <ul style="list-style-type: none"> • Be able to identify the different types of refusals. • Code proper dispositions for survey outcomes involving refusals and callbacks. • Understand the common reasons respondents refuse to cooperate. • Use active listening to discover the real concerns of individual respondents. • Be able to choose rebuttals that address a respondent’s real concerns. • Effectively use appropriate rebuttals.
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>Recommended for Exercises:</p> <ul style="list-style-type: none"> • Print out copies of hand-outs 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 & 30 minutes for the PowerPoint Training; about 1 hour 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, the POST -PowerPoint activity will allow you to assess learning, while reinforcing the material from the module.



Marketing Research Association

Group I: “Refusal Rebuttal”

Facilitator Guide

Table of Contents

Introduction	4
Overview	6
Presentation Goals	6
Key Points	6
Content / Group Exercises	7
Handout of Rebuttals	9
Exam (addendum)	-

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 – Refusal Rebuttal

Overview

The “Refusal Rebuttal” presents:

- Common reasons respondents refuse to participate.
- Active listening techniques to discover real reasons for refusals.
- Correct disposition coding involving refusals and callbacks.
- Use of rebuttals to gain respondent cooperation.

Presentation Goals

Upon completion of this course, interviewers should successfully:

- Be able to identify the different types of refusals.
- Code proper dispositions for survey outcomes involving refusals and callbacks.
- Understand the common reasons respondents refuse to cooperate.
- Use active listening to discover the real concerns of individual respondents.
- Be able to choose rebuttals that address a respondent’s real concerns.
- Effectively use appropriate rebuttals.

Key Points Presented

- Definitions of the different types of refusals.
- Examples of disposition coding for survey outcomes involving refusals and callbacks.
- Common reasons respondents refuse to participate.
- Examples of effective rebuttals using script and recorded examples.
- Interviewer’s role in combating refusals.
- Individual/group exercises to practice skills.

Content:

Slides 3- 11

GROUP ACTIVITY

On slide 5 are recorded examples of respondent objections. Recorded examples will play by clicking mouse or pressing Enter key. After listening to respondent objections, ask participants to discuss what the types of objections were and how to rebut them.

Common respondent objections and concerns presented:

- Selling
- Distrust / Privacy concerns
- “I’m not interested”
- No Time
- On a Do Not Call list
- Talk to someone else

Slides 12- 16

Key Point presented:

Importance of paying attention to:

- Background noise
- How the respondent sounds
- How the Interviewer sounds during the interview process

Slides 17-30

Different survey outcomes and how they are coded are examined. Examples are presented involving coding for soft refusals, hard refusals and callbacks.

Slides 31- 74

Present common respondent concerns and examples of rebuttals that might be used to gain cooperation. (The script used for these examples is included with Facilitator’s Guide.)

#74: The Interviewer’s role in combating refusals; how do you sound?

Discuss key points presented on slide.

“Remember that how you sound is just as important as the words you use in converting a refusal into a successful interview.”

Slides 75- 76

Delivery of the survey

Recorded examples of common refusals and rebuttals will play on slide 76.

Key Points Presented:

- Delivery.

- Listen closely.
- Decide what the concern is.
- Answer quickly and decisively.
- Answer appropriately.
- Always assume the best.
- Keep the pace moving but don't rush.
- Leave the door open for another day.

Slide 77

Delivery Practice.

Play recorded examples of respondent refusals and then have workshop participants respond with their own rebuttals.

(Recorded examples on slides 76 and 77 will play by clicking mouse or pressing Enter key. The script used for slides 76 and 77 is included with this module.)

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

Common Concerns and Rebuttals

Selling:

- I assure you that we're not selling anything. This call is for research purposes only. Your opinions help improve products and services.
- We are only interested in your opinions, and at no time will we attempt to sell you anything. This is not a sales call and there will be no sales follow-up. Your responses are confidential and used only for research purposes.
- You cannot buy anything from us at any time in this call.

You will sell my name:

- All we are seeking is your participation in our national research study, and I assure you that we will not use your name for sales purposes or junk mail.
- We never sell your name or information to anyone for the purpose of selling something; your data is used for research only.

Not Interested:

- Can you tell me if you use/have/see (PRODUCT/SERVICE BEING RESEARCHED)?
- IF YES: Participating in this survey is your chance to express your opinions so (PROFESSION BEING RESEARCHED) can better understand the customers they serve.
- IF NO: (COMPANIES IN THIS PROFESSION) are just as interested in the habits of those who don't use/have/see (PRODUCT) as those who do, and this is your chance to express your opinions.

Not interested:

- In research, it is important that we try to speak with consumers who are difficult to reach as well as those who are eager to participate. The reason we call more than once is to explain why it is important that you participate. You represent thousands of people in your area who were not selected to do this survey.

No Time:

- The survey takes only a short time, and your answers represent thousands in your area that we didn't call.
- I understand that your time is extremely valuable. The survey is short, and I will go as quickly as possible.
- Since your opinions are so valuable to us, I would like to schedule a time when I can call you back. What would be a more convenient time to call you back- this evening or another day?

No time/screening:

- We can call you at any time that is convenient for you. Can I just determine now if anyone in your household is eligible, and then we can arrange a better time to do the interview with that person?
- We would like to mail you the questions so that you can answer them at your convenience. I just need to ask you a few quick questions to assure we send you the correct information. These questions will take no more than 5 minutes.

Didn't ask permission:

- I'm sorry. I started because I do need to make sure you're the person I can interview for the survey. Let me just ask you two quick questions.

Called a cell phone:

(Federal regulations prohibit the use of auto dialers to call cell phones where the respondent is charged for the call and has not provided express consent to be contacted)

- I'm sorry. Are you currently on the free minutes portion of your cell phone use?
IF NO: I'm sorry, we will not call this number again.

Survey too long:

- Please stay on the line just a few more minutes. We're almost finished. Your participation in this survey is so important, as we can't substitute your household with any other household once you've been selected. Your answers represent thousands of people like you who won't have a chance to tell us what they think. Please bear with me, I'll go very quickly.

Concerned about privacy:

- We in the research profession understand completely your concern about privacy today. There are so many companies trying to not only sell things to you, but to sell your information as well. Good research companies belong to several professional associations that follow these practices: Your information is never available individually; your answers are combined with the answers of everyone else in your county or city.

Concerned about privacy:

- (COMPANY) is a marketing research company that's been doing surveys for XX years. In all of that time, we have never released any individual answers to anyone. Our results are grouped only at the county or city level and are shown as percentages.

Concerned about privacy:

- IF APPLICABLE: The toll-free number for our Consumer Research Department is 1-800- XXX-XXXX if you'd like to verify that we really are a research company. After you call the toll-free number I can call you back to do the survey. How does that sound?

Concerned about privacy:

- IF APPLICABLE: We are members of the Council for Marketing and Opinion Research, who works to protect the privacy of all respondents. You can visit the website cmor.org for more information on our standards.

Too personal:

- The personal questions we ask help companies understand different consumer preferences. Companies never see one particular person's answers by themselves, just in groups.
- The personal questions we ask are merely a tool companies use to place the XXX,XXX surveys we do each year into smaller groups that have more meaning. Sometimes these differences are by age, race, female verses male, and sometimes by income. The opinions and uses of these groups help XXX TYPE COMPANIES understand the differences and hopefully offer better programming and content.

How will my answers be used?:

- Your responses are combined with those of other people in your area. Individual answers are not given out to anyone. The overall information helps companies understand the behavior and preferences of various groups of consumers.
- The responses to the study will be used to inform major (TYPE) companies of new trends in the market. Your answers are completely confidential and are compiled as statistics along with those of others who participate.

How will my answers be used?:

- We are collecting this information for research. Your answers will be kept anonymous. When we complete the study, we will give the researchers the information from everyone who participated in the study. The information will be handled in a confidential way so that no individual is identified. All study results will be presented as group data.

How will my answers be used?:

- Our ability to do studies like this one in the future depends on protecting the confidentiality of the people we interview. We have strong security programs on our computer system to make sure that no one but authorized study personnel can access the information after it's collected.

Do Not Call Laws:

- I know you are referring to the law that controls telemarketing companies that are selling over the phone. We are a marketing research company, and companies such as ours do not fall under these laws when we do our research calls. May I explain the importance of our work and why we're calling you?

Do Not Call Laws:

- Let me arrange an earlier time that is less disturbing to you so we can do this survey. What earlier time tomorrow is better for you?
- I understand how the federal law may be confusing, but research calls are not included in the federal regulations that apply to telemarketing calls. We're not selling anything; we'd just like to include your opinions in our research study.

***Do Not Call Laws - If asked about laws:**

- 1991 telephone consumer protection act
- 1995 telemarketing and consumer fraud and abuse prevention act
- Research calls are exempt from the laws
- Not subject to the \$500/call fine

Do Not Call Laws - IF NEEDED:

- Information about telephone consumer rights can be obtained from:
- The Federal Communications Commission (FCC) phone# 202-418-0200 or at www.fcc.gov
- The Federal Trade Commission (FTC) phone# 202-382-4357 or at www.ftc.gov

You are a telemarketer:

- Yours is a good question: many telemarketers start their calls by asking questions, then switch to selling a service or product. A legitimate marketing research company will always start by telling you who they are and why they are calling. If you want to make sure at the beginning of a call whether you are talking to a telemarketer or a research company, stop the caller and ask the ultimate purpose of the call. Ask the caller to explain what his or her company does and what the outcome of the call will be.

I don't do surveys:

- We're conducting a survey of/on (group/topic) and it is important that we get the input of (type of group) adults.
- We are interested in hearing from you because we can't get an accurate view of (topic) across the United States without including every household randomly selected to be in our study. Yours is one of those households. So please help us out in this study.

I don't do surveys:

- It is very important that we include your views and experiences in this randomly selected, national study so that (profession) can understand more what consumers are looking for.

- I understand. A lot of people don't want to talk to someone they don't know. We called because you are one of the hard-to-reach consumers who can make a difference in what companies offer. This give and take works best when it's live on the phone, and that's why we're asking for your help tonight. Remember, you can't buy anything from me. Do you have any concerns about answering survey questions on the phone?

Respondent selection – Why me?:

- I was referred to you by another member of your household.
- We randomly select an adult in each household to ensure that our research findings accurately represent a cross-section of the United States population. In this case, AS AN EXAMPLE: the OLDEST/YOUNGEST/MALE/FEMALE has been selected to complete the last few questions.

Respondent selection process:

- Within each household the computer randomly selects either a man or woman to answer our questions. We use this approach to be sure that we collect information from individuals who are representative of the entire US adult population.
- The computer randomly creates phone numbers, and each household we reach represents many other, similar households. If we replaced one household with another, this makes the study's findings less reliable.

Respondent selection process:

- The reason we do this is to make sure we get a wide variety of people included in our survey. By choosing the person (mention selection method), we make sure we have that random group of people to participate. If we didn't follow this procedure, we could not say that our results accurately represent the American population.

Respondent selected is not home:

- When would be a more convenient time to reach them? May I have a first name so I know whom to ask for when I call back?

How did you get my number?:

- We use a computer-generated list of random phone numbers to be sure we reach all areas of the U.S.
- The computer generated a list of all possible phone numbers that could

exist in the United States. Your phone number was chosen randomly from this list.

How did you get my number?:

- Your number was created through a computer program that takes all of the known area codes and telephone exchanges. Then it creates a series of random 4-digit numbers to attach to the area code and exchanges to create the numbers at random, from which are drawn the study participants.

But my number is unlisted:

- Our computer generates thousands of possible phone numbers. Many end up being unlisted or non-working numbers. We don't buy lists of phone numbers and we don't know the owner of each phone number. This helps us keep the survey anonymous.

Research has no value:

- Research allows you to share your opinions on goods and services you use in the marketplace. Many of the products or services you use most often came to you with the aid of marketing research. The national companies that use marketing research know it is the best way of listening directly to the consumer. Your feedback can affect what is offered, where it is offered, and how it is offered.
- You will help researchers understand what different people in the United States do in their everyday lives in using / doing (topic).

Research has no value:

- The research profession knows that your time is valuable. But equally valuable are your opinions about the goods and services that these national companies offer; that is why we ask you to take 10-15 minutes out of your hectic schedule to guide marketers in what and where and when they should offer goods and services of interest and value to you.
- You have been selected to represent thousands of people in your area, and it is your chance to express your preferences on (topic).

Research has no value:

- This is your chance to let (industry) know what your preferences are, and

this knowledge can influence their decisions on programs, products, and services offered. If the companies provide one product or service that benefits you in the future, your time will be well spent. This is your best chance to make the connection between your preferences and what companies offer.

- We seek the opinions of all people. There are no right or wrong answers. We are only interested in your opinions based on your individual experiences.

Research has no value:

- Americans have always given input to the various areas of their lives; it is what we expect in our society. We let our elected politicians know what we want them to do in the legal area. We let our school boards know how we'd like our children educated. And we let companies know what products or services we don't like by not buying them. Research studies like this are your chance to give your input on what you buy, use, or see in the marketplace, sometimes even before it is available.

Research has no value:

- Sir/madam, your opinions are very important to our clients. This is your opportunity to voice your opinions and help guide development of products and services in the (topic) profession. We'd really like to include your opinions in our study.
- Sir/madam, this is a unique research study, and your responses will guide development of products and services in the (topic) profession. Research is one of the most important ways in which companies improve their products and services to meet your needs.

Research has no value:

- There is one other reason that it is important you give your opinions today. It is not practical, of course, that companies survey every person in your area. We have to select a cross-section of households that represent all the other households like yours that won't be called. Therefore, your answers are vital to the study because they are the only voice of all those other households as well. Once a household has been selected for a study, another household cannot be substituted. Won't you take 10-15 minutes of your time to be that representative who is heard?

Research has no value:

- Sir/madam, the products and services you use often come to you with the

aid of research. As researchers, our priority includes maintaining your confidentiality, respecting your privacy and accurately reporting your opinions. We have nothing to sell, the survey takes only a short time, and your answers represent thousands of people in your area who weren't called.

Research has no value:

- This is a unique research study, and your responses will guide development of products and services in the (topic of survey) profession. We'd really like to include your opinions in our study, and we think you'll find it interesting.
- Marketing research is one of the key ways in which organizations improve their products and services to meet your needs.

Will you pay me for my time?:

- Research companies do not pay respondents, we *do* occasionally offer incentives for participating. We are not including such a gift at this time; however, this is an opportunity for you to voice your opinion, which are very valuable in terms of improving products and services you use.

How long will this take?:

- This survey averages XX minutes in length. The length will depend on the answers you give, but I'll go as quickly as I can.