

## Facilitator Guide

Group # VI

Title: Why Training?

Audience for this Module:	This module has been designed for presentation by Staff Trainers to upper-level management.
Goal of this Module:	<p>After viewing this module, upper-level management will:</p> <ul style="list-style-type: none"> <li>- understand that changes in the marketplace have put additional pressures on the survey research process</li> <li>- understand that improved cooperation between interviewers and respondents produces success leading to lower costs and higher job satisfaction</li> <li>- realize that training is a sound investment that leads to lower overhead costs through higher employee retention and fewer dialings</li> </ul>
Logistics: Materials, Room type/setup, Time needed, etc.	<p style="text-align: center;"><b>You will need:</b> PC or laptop and LCD projector</p> <p style="text-align: center;"><b>Room Set-Up:</b> No special room set-up is needed for this module.</p> <p style="text-align: center;"><b>Timing:</b> Allowing for discussion with management, allow about one hour.</p>
How to make the most of this Module	<p>Prepare to present to senior management by gathering statistics specific to your company to illustrate how problems affecting the industry have affected your company. This could include turnover rate, number of dialings increasing over the past few years for like studies, data quality issues, etc.</p> <p>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. You should view the full presentation to decide if you wish to customize any slides.</p>
How to assess learning	Success will be demonstrated if and when management accepts the need for training and supports its inception.



## **Group VI**

### **“WHY TRAINING?”**

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## OVERVIEW

A joint CMOR-MRA Task Force has developed a series of training modules for survey research telephone interviewers. The Task Force recognizes that there is continuing pressure on data collection operations to keep training costs to a minimum. At the same time, it is believed that a focus on training in the short term will decrease costs in the long term through decreased turnover and increased cooperation. The purpose of this module is to clarify the rationale in recommending that all research companies invest in improved training courses for telephone interviewers.

## OBJECTIVES

At the end of this course, management of research organizations conducting survey research will understand that:

- Changes in both respondents and interviewers have put pressure on the survey research process, lowering cooperation between researcher-respondent and raising costs to collect data.

Training can be used to provide interviewers with tools and skills to increase rapport with potential respondents and overcome their objections more effectively.

- Improved cooperation produces more success in conversion of respondents, leading to higher job satisfaction, along with less dialing to find completes.
- Training, therefore, is a good investment since it leads to lower costs through higher retention and more efficient completion of study objectives.

As a result of this equation, it is hoped that companies will increase their training efforts and will find the CMOR-MRA courses to be indispensable guides for improving results and reducing data collection costs.

## MATERIALS

Trainers will need a PC and an LCD Projector in order to display the PowerPoint module.

**Point of Focus:** This module is intended for use by Trainers or Interviewing Center management to justify to company or senior management the need for additional training such as the CMOR-MRA modules (or any courses), after interviewers have received basic training in conducting telephone surveys. The rationale of this module is to show senior management that interviewers need more than just basic knowledge in conducting phone research in order to handle the demands on respondent interaction in today's environment.

**Slides 1-6:** The Trainer or Manager opens the session by explaining that decreasing response rates and declining interviewing skills are industry-wide problems, resulting in high turnover of interviewers, poor quality of data, and an increasing number of dials for the same level of completed surveys.

As an introduction, it will be helpful if the Trainer/Manager has gathered some statistics specific to the company to illustrate how the industry problem has affected the company. Useful data include turnover trends over the past few years, number of dials over the past few years on similar studies or even tracking studies, and a listing of the quality or data problems encountered on recent studies.

After this introduction, the Trainer can ask senior management for more examples of sources of increased costs, declining quality, and more frequent personnel issues. These personal anecdotes and concerns can be used to further illustrate the growing problem and the resulting consequences of increased costs and difficulty in completing projects.

**Slide 7:** The presenter then takes a step back for participants by pinpointing the causes of increased costs. It is important to show how the industry has changed in the past 10 years, as those forces of change are arguments that management must adjust its approach to the job of research.

After Slide 7, the Trainer can ask for more discussion among the managers on other examples of forces bringing pressure to change.

**Slides 9-11:** The Trainer now completes the connection between increased training, improved results and decreased costs. These slides show other expert advice on how the efficiency is achieved. At this point, it would be a good time for the presenter to have prepared and show the viewers some cost models and estimates specific to that company. These estimates will justify purchase of the training modules by comparing the cost of additional training to the savings resulting from decreased turnover, fewer dialings on a study and improved client satisfaction.

To develop several levels of cost/savings models, the Trainer can work with other Interviewing Center Managers or Trainers/Managers from other companies that

have incorporated the courses into their training program. The results of other companies' efforts support the module's thesis, and Trainers are encouraged to contact fellow CMOR or MRA members to gather examples. If outside information is not available, the trainer can still develop some hypothetical but modest modules to encourage further discussion (e.g. what if turnover was cut 5%, 10%, 20%?).

At the conclusion of the module, the presenter should invite the viewers to discuss what level of increased training they would be comfortable with when adding the training modules to their core curriculum. The Trainer/Manager can work with the group to estimate the cost of adding modules individually and plan how to track the benefits and savings after each module is introduced. Unless the senior management group embraces the concept of more training immediately, it is usually better for the training and operations departments to introduce the additional courses gradually.

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