QUALITATIVE RESEARCH: 5 RECRUITING STRATEGIES THAT GET RESULTS

The success of any qualitative research project depends on the suitability of the respondents. In fact, recruiting is so important for qualitative work, it needs to be at the top of our list of concerns as we plan each project.

A high quality recruit leads to useful, valid, actionable findings for the client.

When recruiting is done effectively, the result is a pleasant and fruitful research process for all stakeholders.

On the other hand, ineffectual recruiting can lead to a wide range of unpleasant outcomes: bad data, disengaged participants, no-shows, or even, as Chaucer once said:

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Better ys rotten appulle
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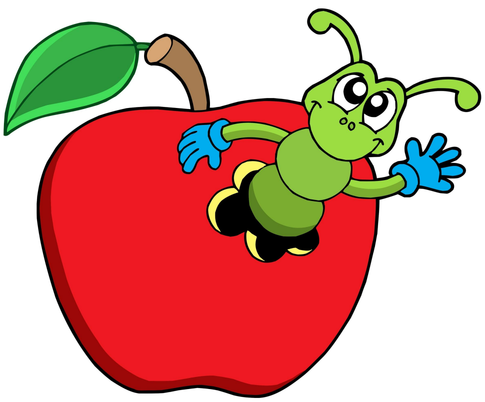

So how can we **avoid the bad apples**, and instead find the people who will help us produce successful, useful results?

Of course, it is important that each respondent fit our screening criteria. But before we get to that point, we need to make sure our criteria are on point, and our recruiting practices effective. By refining our planning and our processes, we can find a set of **respondents that are articulate, authentic, enthusiastic, reliable, and consistent with our technical criteria.**

Preparation for research will define the actionable findings that follow, and whether those findings will be useful for the end client. Here we can compare and contrast the results of a successful recruit, versus a recruit that failed to find the appropriate participant:

Desirable	Undesirable
• Everyone shows up • Respondents are engaged and enthusiastic • Respondents fit with study objectives (specific criteria, balanced quotas, etc.) • Respondents are able to voice creative, insightful opinions • **Actionable findings**	• Disinterested or disengaged respondents • Some respondents unable to creatively voice an opinion • Respondents who are a mismatch to the objectives of the study • Respondents who misrepresented preferences (inauthentic) • A low energy group dynamic • No-shows

At Amplify Research Partners, we work with independent moderators, full service research firms, and end users to conduct qualitative research at our own facility in Pleasanton, CA, as well as other locations throughout the United States.

In working with this wide range of partners, we have determined some best practices for recruiting. In this three part series, we will go over recommendations in the following areas:

1. **Understanding your target**
2. **Optimizing your screener**
3. **Looking outside the database**
4. **The value of phone screening**
5. **Validating your respondents**

Let's start at the beginning…

UNDERSTANDING YOUR TARGET

When starting a recruiting project, we pay close attention to fundamentals. It may seem obvious—we need to understand your requirements for target respondents. However, many recruiting projects go off the rails due to misalignment of recruiting strategy with broader project objectives.

When we start a recruiting project, our first step is consulting with the client to ensure we all are working from the same concept of the target. In many cases, the requirements will be straightforward, with a ready screener that leads to a simple and successful recruiting process.

In other cases, **complexity** can arise from a number of factors.

- For instance, **prior quantitative work** may influence or complicate screening criteria.
- Or perhaps the client is looking for a **highly specialized or exclusive** type of consumer.
- Or maybe there is a particular **quota** that will be difficult to fill.

In any event, before proceeding, we need to make sure the requirements are clear to all concerned.

In particular, when recruiting, we want to avoid mechanically plugging in people based only on screener criteria,

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without having a deeper understanding of the broader objectives.

For example, let's look at aligning prior quantitative research with our qualitative study. When given screening frameworks coming from a quantitative project, such as an algorithm or segmentation array, it is important to understand the criteria that make up each segmentation outcome. That way we can ensure that the quantitative categories are in accordance with the qualitative criteria.

Or perhaps we need to find respondents in a highly specific market niche. The requirements may require us to go outside our database, and use a more specialized approach. Maybe we will find our participants through an internet community, social media, or other forms of networking. To find the right people, efficiently and on-time, we will need to understand our target, and appropriately design our approach.

OPTIMIZING YOUR SCREENER

In many cases, we can take a screener provided by a client, and simply run it against our database, with excellent results.

In other, more complex cases, we need to come up with a more refined strategy in order to recruit a group that truly fits the target objectives. This strategy may require us to look outside of our proprietary database (which we will discuss in more depth below), or we may need to revise the screener to find the right people.

At Amplify, we are usually working with independent moderators, other research firms, or end clients. **In each of these cases, we want to trust the expertise of our partners, and see how we can add value toward recruiting objectives.**

Before starting a recruiting project, we suggest the following steps:

- Ensure all questions are precise, and easily understood
- Sequence the questions, identify unsuitable candidates early

- Avoid misalignment and conflicting quotas
- Avoid leading questions, or questions where some responses are clearly more socially desirable than others
- Include questions that allow for articulate, creative responses

Even after reviewing the screener, once we start recruiting, we may find that the screener is not delivering the desired results. In such cases, we may offer suggestions to adjust the language on one or more questions, or may add or subtract criteria.

Ideally, this type of adjustment should occur at the earliest possible stage, and should involve the least amount of change that will deliver the desired result.

For example, if a screener seems to have a hole in the information, or if it is allowing everyone through, we may want to revise one or more questions to tighten the criteria.

Conversely, we may find that very few people are qualifying through the screening process, potentially excluding individuals who may actually satisfy the project objectives.
If a screener is appearing overly restrictive, it is important to determine not only where people are falling out, but why. In the end, the objective is not to relax the screener, but instead to make measured adjustments that will deliver the right respondents.

Case Examples

Our suggestions for screener edits can range from making simple adjustments in language to adding a question or two to ensure that we are really recruiting the correct respondents for the study.

For instance, oftentimes we find that screeners have language that is a bit more techie than the average consumer:

"Which of the following devices do you use to *cast* to your TV?"

While many consumers will know what "casting" is, we don't want to eliminate those who are casting, but just don't know the lingo. By recommending simple addition to the question, we avoid losing potentially qualified and articulate respondents by making sure that the language is clear for those who may not be as tech-savvy:

"Which of the following devices do you use to cast, *or mirror your device's screen*, to your TV?"

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In the following scenario, the original screener was a bit too broad and our concern was that those who truly did not fit the objective of the study were going to qualify per the screener.

Original:
1. Do you own and use a portable speaker?

Yes CONTINUE
No THANK & TERMINATE

2. What is the maximum you would be willing to pay for high quality, state-of-the-art portable speaker?

____
MUST BE $150 OR MORE

Suggested addition to screener:
1b. You mentioned you own a portable speaker. What brand of portable speaker do you currently own and use?

____

This additional question allowed us to validate the information gathered at Q2. If we came across an individual who currently owned a $5 speaker at the new Q1b, the likelihood that they would pay over $150 for a new one didn't align with the type of respondent we were trying to recruit. By adding this one question, we were able to recruit respondents better suited for the study, resulting in improved findings.

Quotas
Similarly, as recruiting progresses, quotas need to be evaluated regularly to ensure diversity and balance.

There will be a tendency to try and fill easy quotas early, but doing so will inadvertently cause us to paint ourselves into a corner, especially with lower incidence quotas.

For example:

Recruit 100 cable users with the following quotas:

60% Cable Provider A
15% Cable Provider B
15% Cable Provider C
10% Cable Provider D

50/50 gender split

18-54 years old (recruit a mix)

Mixes of ethnicity and income

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By reviewing just these few recruiting specs, we are able to develop an effective recruiting strategy by identifying who the most difficult respondents will be to recruit:

Most Difficult to Recruit:
18-34 year old males (less likely to have cable and more difficult to recruit, in general)
18-34 year old females (less likely to have cable)
35-44 year old males
Cable Providers B-D

Easiest to Recruit:
35-54 year old females
Cable Provider A

If we were to recruit without a strategy, we could easily start by filling our 35-54 quota with females who use Cable Provider A. Additionally, without being mindful of other demographic quotas, we could end up with a scenario where we are left trying to recruit Males, 18-24 years old, using Cable Provider D with $100K+ incomes who are Hispanic.

Additionally, during the course of the recruit, we found that far fewer respondents were using Cable Providers B-D and the vast majority were using Cable Provider A. So while this recruit seemed like a slam dunk, if we had not enacted our recruiting strategy from the beginning, we could have jeopardized the timeline of the recruit, causing undo stress and concern for the client.

By assessing what will be the more difficult quotas and recruiting those first, we are then able to complete the recruit on spec and on-time with the appropriate quotas as outlined in the screener.

LOOKING OUTSIDE THE DATABASE

A well-structured database is a tremendous asset for recruiting. A database can provide a form of pre-screening, and allows you to reach out to a large and diverse range of potentially suitable respondents.

For some projects, however, even an extensive database may not serve your objectives. As qualitative research has become more sophisticated, many screeners have become highly specific, focusing on a tightly targeted set of requirements. In these cases, we often need to go outside our database to find the right people.

This type of recruiting requires more active networking—using social media, and connecting with people in online communities and message boards.

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Case Study

Project: Professional Snowboarders and Competitive Marathon Runners Recruit

Methodology: In-Home Interviews

Challenge: Where to find these respondents since these individuals don't live in a typical recruiting database

Solution: Having only one networking strategy would not suffice as we had two targets, and a tight recruiting deadline. Utilizing multiple methods to find these hard-to-find respondents was the only way to successfully complete the recruit.

- *Networking through our own database:* we reached out to those in our database to see if they knew anyone in the area who fit the target.
- *Local snowboarding and running shops:* we spoke with employees and owners of snowboarding and running shops to ask for referrals
- *Runner and snowboarder online groups:* we posted on local runner and snowboarder groups
- *Researching local runners and snowboarders:* we researched local runners and snowboarders and personally messaged them via social media.

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This example illustrates a challenging recruiting project, for which it was necessary to go beyond a database-oriented approach. When presented with a highly specialized target group, it is important to strategize early, and determine where the target group can be reached.

THE VALUE OF PHONE SCREENING

When trying to accurately evaluate respondents, a combination of online and phone screening optimizes results. There are strengths and weaknesses to each method, so utilizing both in combination is a good way to validate results.

These days, technology can be extremely helpful for making the recruiting process more efficient—for reaching more people, and for creating useful databases of potential respondents.

Moreover, online screening methods are useful for acquiring certain types of information. Numerous academic and industry studies have examined online versus phone screening, with some consistent conclusions across multiple studies.

Certainly online screening can be a time and cost saver. Additionally, online screening may give advantages in terms of information quality, in certain circumstances.

In online surveys, as compared to person-to-person conversations, respondents tend to be more willing to provide answers that incur social risk—such as answers that are more controversial, or less socially desirable. For instance, when asked about the number of times a household bathroom is cleaned, a respondent will be more likely to inflate the number (i.e., provide the more socially desirable response) when speaking with a live person, as opposed to during an online screen.

At the same time, there is tremendous value in using phone screening during the recruiting process. At Amplify, we use phone screening for all of our projects. The live connection provides a compelling extra level of confidence regarding our respondents.

Phone screening helps ensure a more consistent, articulate, authentic, and reliable group of participants.

For instance, often a respondent will misunderstand a question, or a response won't fit neatly into the predefined categories. One-on-one conversations allow us to get a more nuanced understanding of each individual's responses, and move beyond the rigid structure of an online screen.

During the process of phone screening, we can also gauge articulation, authenticity, response time to questions, and attitude towards the questions and topic.

For instance:

Does the respondent talk too much during the screening, offering too much information, go off on tangents or talk over the Recruiter?

This is a red flag that this person may take over a group conversation. While they may be qualified for the study, we do not want to recruit anyone who may dominate the discussion. Oftentimes we will place someone like this on hold for a Supervisor to contact to make the decision as to whether they are appropriate for the discussion.

Does the respondent take a lot of time answering questions?

Since we want active participants, a respondent who is slow to answer questions over the phone most likely will be of less value once he gets to an in-person discussion.

Did they offer unsolicited information that wasn't specifically asked in the screener that was cause for concern?

For a recent study on pet food, a respondent mentioned that she would purchase Dog Food X in the future, which along with her other answers, pre-qualified her for the study. During the phone screen, she off-handedly told our recruiter that she was moving overseas, couldn't take their dog with them and were currently seeking a new home for Rover. Our recruiter understood that this was a unique situation where the respondent would not only no longer have a pet to purchase food for, but that this was also an emotional time for her, therefore, she may not be best suited for the study.

Without this important step, we lose significant nuances that are only obtained through direct verbal communication.

We also find that people value their commitments more when they have spoken with a human being. Therefore, we see better attendance and punctuality rates resulting from phone screening.

VERIFICATION

As mentioned, a multi-pronged approach to recruiting yields superior results. Prescreening narrows the sample group, allowing for a targeted approach to phone screening. Phone screening provides the comprehensive evaluation for selecting respondents. Finally, a post-screen, either online or in-person, validates results, and adds a higher confidence level in terms of suitability and reliability.

We recommend a three-part screening/verification process, as experience has taught us that this level of redundancy affords the best outcomes. Why do we endorse a three-stage process? Because we need the *fourth response* during the in-person research to be consistent, every time.

If a respondent comes into a focus group and starts giving answers inconsistent with the target objective, the study's objectives can be compromised, and the validity of the research can be called into question.

Also, considering the work that goes into recruiting, it is worth having a final verification stage to achieve consistent results across projects. Granted, some respondents might be resistant to performing *another* screening process, after having performed two already. But, as a consequence, the final screen will weed out the unreliable and those with weak commitment, in addition to detecting inconsistencies in response.

Verification Example: Reliability

Jane was scheduled for a project on the topic of Cookies. She went through the pre-qualification survey and spoke to a recruiter over the phone. We determined that she qualified for the study.

Jane was told during the invitation to participate that she would receive a confirmation letter, including a validation survey. It was required that she complete the survey within the next 48 hours.

●

Why do we endorse a three-stage process? Because we need the *fourth response* during the in-person research to be consistent, every time.

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Although Jane seemed excited and able to participate in the study over the phone, she suddenly went radio silent. After a couple of attempts to contact Jane regarding the study and

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validation survey, we left one final message indicating that we could no longer use her.

In our experience, if Jane wasn't able to take the time to complete the validation process, the likelihood of her not showing up for the research or canceling at the last minute increases dramatically.

Verification Example: Screening Validation

Using the same study example, we had Brand A cookie purchasers and Non-Brand A purchasers, which determined which group respondents were recruited into.

In the pre-qualification survey and phone screening, Josh said that he'd purchased Brand A in the past, but in his validation survey, he then said he *hadn't purchased* Brand A. What happened? He had already told us twice that he'd purchased Brand A! Our Recruiting Supervisor reached out to Josh and re-asked the question again.

At this point, Josh said he wasn't sure if he had purchased Brand A in the past, which rendered him ineligible for the study. If we had not conducted the third stage of verification, Josh would have come into the Brand A purchasers group possibly indicating that he had never purchased them, or being very unsure of his purchase at the very least.

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In the end, we all want our qualitative research to successful, accurate, and actionable.

The tips you see above are time-tested methods for reliable recruiting. Of course, we always welcome conversation on this or related topics. Further inquiries can be directed to

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