6 STEPS TO PERFECT QUAL

The L&E trust guide to ensure the success of your project

STEP 2

QUALITATIVE RESEARCH RECRUITMENT

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STEP TWO: QUALITATIVE RESEARCH RECRUITMENT

In a world focused on 'how much,' it's qualitative research that digs deep to uncover the truth in consumer behavior. If the goal of qual is to explore rather than confirm, then the best qualitative research is in the art of asking the right questions, with the right people, and sharing the journey they take you on, in order to result in true insight.

Our series of six white papers and webinars is designed to support you every step along the way in your project – to provide a guide to the key elements that will drive success and how we at L&E can help you.

This second paper will guide you through qualitative research recruitment best practices to provide you with the best sample to achieve the best insight.

INTRODUCTION TO RECRUITMENT BEST PRACTICES

Recruitment is the foundation of good research.

Research consultants recognize that high quality recruiting is a critical part of any successful research project. It's a rather simple equation really; quality recruits provide quality data. In order to guarantee true insight, researchers first need to guarantee a true representative sample. But for this guarantee, there are some guidelines, and several firm rules, that must be carefully considered. The recruitment process therefore has the potential to place pressure on small qualitative research consultants; so to help you get the best insight, this paper provides the ultimate best practice guide for quality recruitment.

> **“In order to guarantee true insight, researchers first need to guarantee a true representative sample.**

STEPS FOR RECRUITMENT

To start you off, here are some critical steps and valuable tips in getting the right respondents.

01 Determine objectives, timeline and deliverables

The recruiting process must begin with a kick-off meeting between the researcher and the recruiter to determine and understand the project's objectives, timeline and deliverables, which all underline the recruiting strategy. Verbal communication eliminates any miscommunication that can result from written communication such as email.

02 Set achievable sample specifications and clearly communicate them

The sample specifications should always match the project aims and objectives. To achieve the best recruits, there must be strong communication and understanding between the client, the researcher and the recruiter. This is particularly true when agreeing upon clear, achievable sample specifications. Just one misinterpreted quota can lead to vigorous backtracking and several added hours, or even days, of work.

03 Pay close attention to screener qualification questions

Getting the screener questions right, while keeping them short and simple, will bring in the right people without losing qualified respondents due to long-winded screeners. The questions should focus on the qualifications that are most important to meeting the project objectives. It's also important to inform the respondents about the project at the recruitment stage in terms of what will be expected of them and how the research will be recorded and used.

Screeners are mini questionnaires, and should be treated with the same skills and techniques. Some of the key problems in designing screeners is that they are too long, unclear, or biased. Poorly planned screeners also tend to leave out crucial questions, which allow unqualified participants to slip through and manipulate the data. To prevent respondents from affecting the quality of the data, screeners should be cut down to 5 to 15 easy questions, with only those that are necessary to determine eligibility, and prioritized with the questions that will disqualify the most people immediately.

GUIDELINES FOR WRITING QUESTIONS

1. **State the unit of measurement**
2. **Use the vocabulary of respondents**
3. **Use precise words and phrases**
4. **When using the word "you," make sure respondents know to whom you are referring**
5. **Make sure the question is really asking only one question**
6. **When asking for percentages, make sure the base is clear**
7. **Make sure the question stem and the answer choices match each other**
8. **Use forced-choice questions and trap questions**
9. **Use bold, underlining, italics, and/or capitalization to highlight key words and phrases**
10. **Properly pre-test questions**

04 Understand and consider participation and incidence rates

To reach sample quota, it's necessary to first consider how the target population typically participates in market research. Participation rates can be influenced by the survey length, topic interest, incentive value, and convenience in the timing, location and method.

It's also important to plan ahead for incidence rates. Niche or unusual populations are more difficult to recruit. There are a lot of rare target markets out there. For example, there are only 270 Hemophilia doctors in the US. That's a tiny amount to build a workable sample from. You will need to adjust your incidence rates and timelines to reflect this tricky target market.

05 Match incentives to your sample

In nearly every study an incentive is expected and required to secure a workable sample. Incentives should be carefully considered based on the specific sample's interests and preferences. Some groups prefer cash, others gift cards, others airline points, and others a chance to win a beach destination vacation. Alternatively, offering a summary of the research results may work as a suitable incentive for some, particularly for business respondents who may be limited to incentives due to their company's corporate policies.

06 Start sourcing the right respondents

So where do you find this perfect sample then? Sample can be sourced from panels, organic databases, purchased lists, business directories, and even social media. Working closely with a recruiter will guarantee the best approach. One very important factor when it comes to sample sourcing is location. Selecting a strategic market location is essential to finding sample which is truly representative of the target market. The respondents will be directly representative of the demographics and psychographics of their region. Therefore at L&E we've made it a priority to strategically place our facilities in markets that contain a vast range of demographics. This makes for a truly representative sample of Americans in tier two markets - markets which are not over-researched like many major market locations.

07 Continuously review recruiting results to address issues early on

The recruiter will send a report of participating respondents once the project starts. This report should be carefully reviewed on an ongoing basis to identify any missing key requirements or in order to flag necessary changes. Questions or uncertainties should be raised early on so the recruiter can make adjustments and fine-tune the respondent list long before the recruiting process is complete. This can relieve a lot of time and financial effort.

LEADING TECHNIQUES TAKING ADVANTAGE OF NEW (AND OLD) RESOURCES

Recruitment is turning digital, and new recruiting methods are approaching the classic trinity of cost, quality and speed. It's no longer a 'choose two only' situation; now it is possible to pick all three.

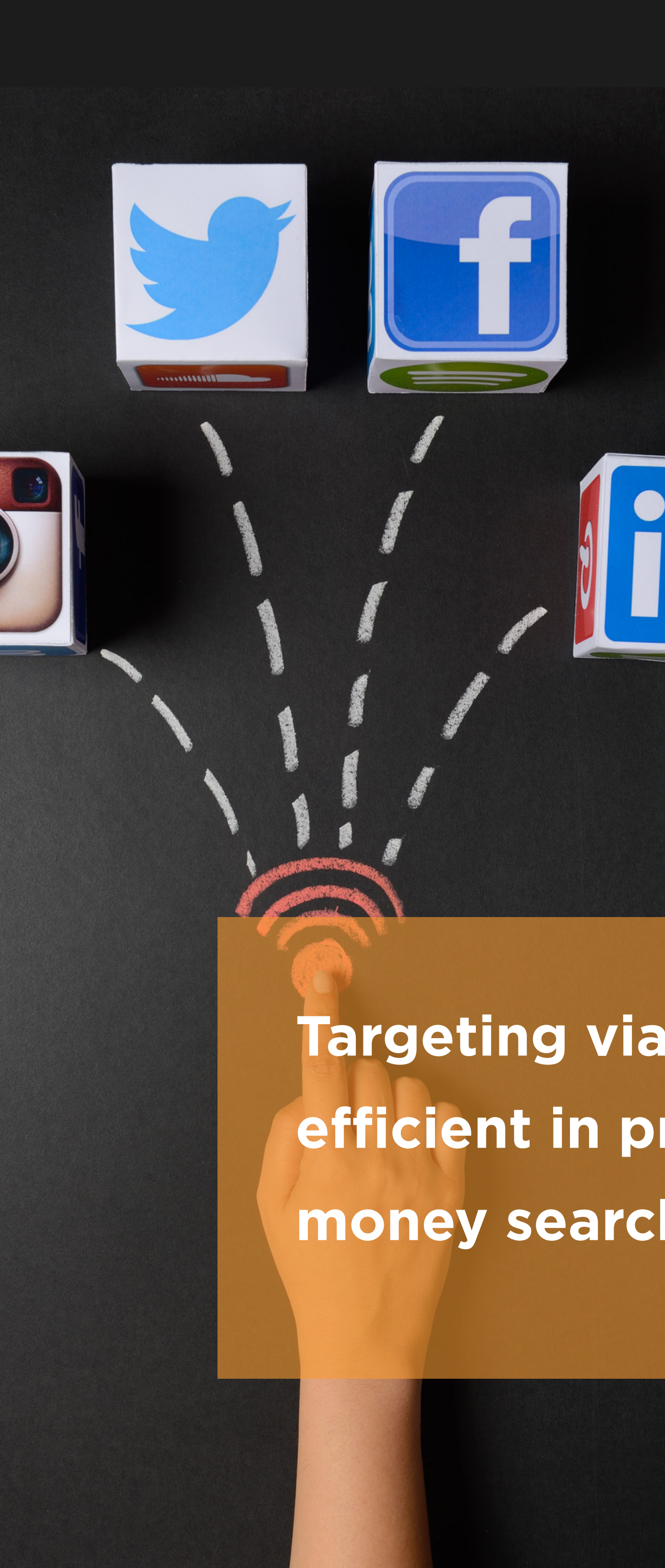
From social media to mobile phones, new methods are emerging from these technologies as they extend their original purpose and move into the recruiting process, adding a new set of options for qualitative recruitment.

Technology is giving us quality recruits in real time, much faster and cheaper than before. Ultimately, this allows us to deliver faster insight to clients, while reducing overall time and costs.

But to snag the best recruits, you need to look at combining old and new methods. It's true that digital methods offer many advantages to the recruitment process, but not everyone resides in a purely digital world. If scope is what you want, and you do, then it's in the practice of using technology to support and enhance existing recruitment techniques.

Old-fashioned database list. These are often long lists of clients and potential respondents. It's always important to be wary of the quality of lists, particularly when they are old databases. Length can also be a concern, because although the list may seem long, screening requirements and participation rates will often knock the list down significantly. In reality, it's not unusual to need a 10:1 participant ration. A list can easily be exhausted so other methods are often required for successful recruiting.

Social media. Current industry conversation around social media usually refers to big data and online communities, but qualitative recruitment can also benefit from social media platforms. Social media platforms can locate participants in a highly targeted manner, using simple demographics such as age and location, or by using any number of psychographics from video gamers to jazz enthusiasts. The communities behind LinkedIn, Twitter, Facebook and online forums are viewed as credible recruitment sources containing actual representation of members with personal and genuine insight. Targeting via social media directly is often more efficient in prescreening, which saves time and money



searching for qualified participants. Some niche groups are very difficult to find using traditional methods, but by using social media it's easier to access those hard-to-reach respondents hiding in online support forums and communities featuring specific interests. Of course, social media should only be used to find and prescreen participants; it's still necessary to follow up with a phone call to ensure quality – a perfect example of combining old and new methods.

Ads and flyers. Placing ads in university newsletters, local newspapers, radio, television stations, and now anywhere online is a suitable method for bringing in respondents. Flyers can also be distributed or displayed as one-pagers, pamphlets, brochures or posters.

In addition to many of the above recruiting techniques, L&E has recruiters based in seven markets across the US, so when we need people to actually go out in person and recruit, we can do that. No matter how tough your recruit, we won't stop until we have a national representation of the exact sample criteria you need, so the recruitment team will get creative with guerilla tactics, grassroots methods, and whatever it takes to provide a solution.

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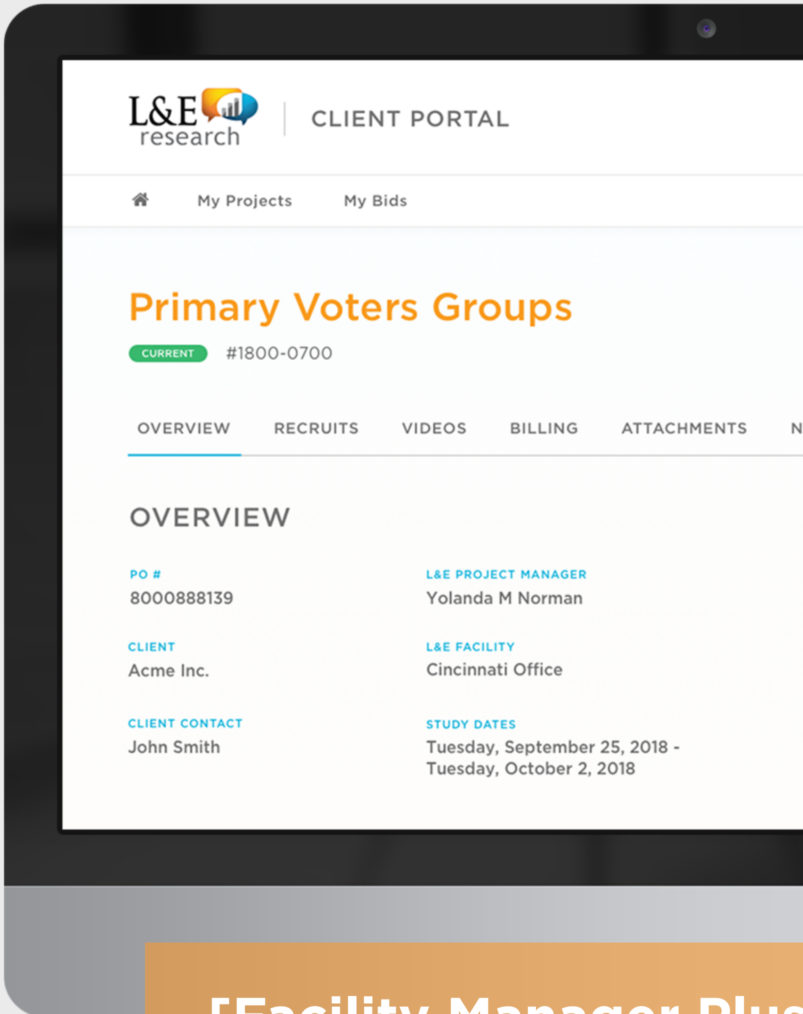
TECHNOLOGY IS UPGRADING RECRUITMENT SOFTWARE

To secure the best recruits, from current customers to competitors' customers, you need to leverage technology and know-how.

If you utilize leading software platforms, such as Facility Manager Plus (FMP), which is L&E's proprietary software for recruiting and project management, you can easily recruit and manage quality sample to optimize the insight.

Using the latest technology in recruitment software will provide a host of benefits. With FMP, you can:

- Track over a hundred data points for each respondent to help source only qualified respondents, such as education, income, children, job , owned technology, etc.
- Provide respondents with 24/7 access to their profiles for continual updates.
- Access previous screeners, pre-screeners and web comments (free form text responses to studies that are posted on the web) to easily search for keywords when creating a list of potential respondents.
- Easily track respondent participation in previous studies to eliminate



respondents based on participation requirements and to prioritize recruiting respondents who have never participated in a study, to ensure around 35% first-timer respondents.

» Use tools to recruit using online surveys, phone calls, or a combination of the two. Most researchers begin the recruitment process with online pre-screener questions before they are further screened for qualification by phone.

» Save all information and data in one secure place throughout the project's lifecycle, not just during the recruiting process.

» Access live recruiting so researchers can easily review the recruitment status for items such as recruits on hold.

This recruitment software is completely transparent so researchers can deliver the recruitment information to clients early on and throughout the process. It also increases the communication between the recruiter and project managers, and ultimately to the researchers. The platform contains all project data along with infographics for improved data visualized value. All recruiters working on a project can monitor progress and communicate notes and details in real time, which reduces the chance of duplicating efforts or miscommunication in project changes.

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HOW L&E SUPPORTS THE RECRUITMENT PROCESS

To ensure qualified recruits, you need a qualified recruiter who has access to the latest technology and recruitment techniques. Recruiters have the skills and expertise, as well as the creativity and resources, to recruit even the rarest respondents for quality insights.

L&E Research offers small, independent qualitative research consultants over 30 years of experience and a large recruiting staff size of over 100, making the process much easier and the research more effective. L&E's high Net Promoter Score guarantees working with the best recruiters in the industry.

Plus, unique to L&E is our Member Development Lead Officer, whose primary responsibility is to create and implement innovative and effective programs to grow the L&E Research member database.

More than 500,000 consumers, medical professionals and teachers have signed up with L&E Research. Experience and knowledge of the corporate world, the clinical arena and a broad range of other areas, give researchers access to a variety of recruiting categories such as:

- B2B
- Consumers
- Corporate Executives
- Patients
- Sensitive Issues Recruiting
- Teachers
- Teens/Kids
- Medical Professionals:
  - Physicians
  - Physician Assistants
  - Nurses (NP, RN, LPN, DNE, CDE)
  - Physical Therapists
  - Practice Staff
  - Pharmacists
  - Dentists

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CONCLUSION

Researchers need recruitment partners, not order-takers, who will take full responsibility for the success of recruitment. Recruiters are there to not only provide comprehensive feedback on recruitment status, but also to consult on the best methods to achieve the project objectives. Carefully follow this L&E trust guide, latch onto the leading technologies (both new and old), and grasp the latest technology in recruitment software to maximize your recruitment strategy. Wrap it all up with a qualified recruiter to ensure quality sample and quality results, and you're good to go.

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