12 Steps to a Perfect Recruit

How to Avoid the Coach-Potato Triathlete

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Early in my career as a moderator, I had the misfortune of recruiting a focus group that we later called, "the couch-potato triathletes." Imagine my horror when a "triathlete" with a giant gut sat on the couch before me. Picture my client's reaction as one "triathele" began to describe his experience in a triathlon by saying, "I imagine I would have..." Most recruiting errors are not so extreme but anyone with significant research experience has seen sessions where unqualified respondents slipped in or groups were not completely filled.

This paper outlines 12 steps moderators should take to ensure an excellent recruit but it is not for moderators – this paper is for you, the research client. Successful qualitative research, including successful recruits, requires a partnership between the moderator, the client researcher, and his or her internal team. If you truly partner with your moderator and commit to carefully executing all 12 of these steps together, you should expect an excellent recruit every time. If your moderator isn't doing everything on this list, your recruit could be in jeopardy.

Failure to ask the right screening questions, which caused the triathlete blunder, is just one cause of recruiting errors. Sometimes consumers don't know the answer to questions posed by recruiters, such as the model or brand of a product they use, and offer their best guess; these answers often change upon rescreening. Other respondents out-and-out lie to qualify.

As it turned out, the couch-potato story had a happy ending. Of course, we assumed complete responsibility for the failure and the associated expenses. Our client was understanding and patient enough to allow us to try again. Abandoning conventional recruiting methods, we went to the publisher of Triathlete magazine, who helped us assemble a world-class group of triathletes including a two-time winner of the Iron Man Triathlon and an Olympic silver medal winner. Over the years, this researcher has become one of our most loyal and supportive clients.

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Three Words: Early Bird Raffle

Meet & Greet Before the Session

Rescreen Before the Group

Stay on Top of the Recruit

Pay the Right Incentive

Partner with Your Recruiter

Select the Right Recruiter for the Job

Allow Enough Time to Recruit and Make Sure the Recruiter Uses It

Carefully Craft the Screener and Challenge Traditional Screener Tenets

Validate the Incidence in the Population

Negotiate Group Specifications with the Entire Client Team

Spell Out Research Objectives & Revisit Them at Every Step

Step 1: Spell Out Research Objectives & Revisit Them at Every Step

Clear and detailed research objectives are the cornerstone of any research project, and they drive all decision making around group specifications. Developing research objectives should be a collaborative effort involving the moderator, the research director, and the rest of the client team. To ensure absolute alignment around objectives, the moderator or client researcher should commit the objectives to writing and get agreement of the entire team that the objectives are clear, correct, and unambiguous.

Solid research objectives then serve as a touchstone at every step in the process, including those in this paper as well as subsequent steps (i.e., conducting sessions, analyzing results, and writing reports). In order to ensure objectives are met, they should be reviewed and reconsidered as each new activity begins. Sometimes objectives can be a moving target, especially early in a project. As each step in the process reveals new information, or as goals and political debates within client organizations shift, it can become necessary to modify the objectives.

For example, if one is having difficulty finding qualified respondents, a review of the objectives can help determine if the specifications should be relaxed or if a different approach to recruiting might be necessary. Even at the end of the project, when writing the report, a careful review of the objectives guarantees that the report addresses all research objectives.

Step 2: Negotiate Group Specifications with the Entire Client Team

Detailed group specifications are critical to a successful recruit, serving as the basis for writing the screener. Generally, the research director provides a brief outline of the specifications and it is the moderator's role to completely flesh out detailed specs. A complete review of the project objectives should drive development of detailed demographic and psychographic specifications. It is then important to review the specifications with the client team, not only to obtain their buy-in, but also because a diverse team can always improve the work product. This review can usually be achieved in a conference call or even via email.

There is a danger in involving the client team in writing specifications – "Recruit Creep." This is where various team members put their mark on the project by saying, "Now that we're out there, let's include a couple of people who only use our product on Tuesdays..." There are always difficult choices to make at this stage – that's why I think of this step as a negotiation. The moderator needs to focus the team on the research objectives in order to define targets that are narrow enough to be meaningful but not overly constraining. It is also a good idea to prioritize specifications at this stage so the moderator can make snap decisions during the recruit about respondents whose qualifications fall into a gray area.

Step 3: Validate the Incidence in the Population

This is an easy step to overlook because research often involves populations that clients think they know well – their current customers and prospects. Anheuser-Busch ought to know who drinks beer. Nestle should be able to tell the moderator who bakes chocolate-chip cookies. Still, it always helps to ask the question, "What do we know about the incidence of this specific demographic-psychographic group within the population?"

A manufacturer of business equipment once asked me to recruit office managers from companies with an older model from its product line. I became concerned when they could not provide an up-to-date customer list and asked the researcher what proportion of companies still had this equipment. She checked with her marketing and support peers who estimated that only 0.2% of businesses in America still had that model – and we didn't know who they were. Upon review, the client team decided that we could broaden the specifications to include newer units and still meet our research objectives.

In another case, a team was developing a medical device for people with a certain condition and wanted to conduct focus groups in several US and European cities. The client had previously recruited this population often in the US and we made the assumption that the incidence of people with this condition would be about the same in all cities. The recruit was going well in all but one European city. An inquiry to the country sales manager quickly confirmed what we suspected – the incidence in that city happened to be unusually low.

When you know your target population has a very low incidence, you have a number of options. Modifying project objectives, changing specs without having an impact on objectives, and conducting smaller groups are all viable alternatives. Another option is to change the research methodology to teleconference groups, online groups, or consumer-generated video ethnography across multiple cities. I have used this option, for example, on a project where the client needed to learn from experts in a highly specialized technical discipline. There was only a handful of these experts and they were spread across the country.

Step 4: Carefully Craft the Screener and Challenge Traditional Screener Tenets

A good screener will deliver perfectly qualified candidates without screening out qualified candidates, and it will do so in as few questions as possible. The more questions on a screener, the higher the likelihood that a qualified candidate will hang up before completing the interview. I generally follow these guidelines when drafting a screener:

- Put a detailed summary of group specifications on the first page of the screener so the recruiter knows what the screener is supposed to achieve.
- Ask the questions that are most likely to weed out unqualified candidates up front in the screener; the less time your recruiter spends on unqualified candidates the more he or she can spend on additional calls.
- Ask a mix of multiple-choice and open-ended questions. Multiple-choice questions can get provide answers quickly but open-ended questions often reveal more about respondents' true knowledge and feelings.
- Challenge every question you put into the screener to be absolutely certain it is needed.

Try to challenge questions that you habitually use, for example, "past-participation" questions used to weed out focus group junkies. Yes, these people can be harmful to sessions, making it more difficult to have a "natural" discussion by anticipating what moderators are going to ask and even what answers they "want." However, these screening questions make it difficult to recruit frequently recruited populations such as doctors or IT managers. In these cases, I tend to relax or eliminate past participation clauses. Indeed, these respondents are often focus group experts but an experienced moderator should still be able to direct a balanced, candid, and truthful discussion.

You should also consider disclosing the brand name of the sponsoring organization during the recruit. It is true that brands can steer conversations and disclosing the brand should be avoided in most cases. However, particularly in business-to-business (B2B) projects, a strong brand name can attract respondents who might not otherwise agree to attend. Further, in many markets there are only a handful of competitors and respondents are already playing "Guess who the client is." Since the brand is likely to be top-of-mind anyway, you might as well leverage the brand to draw more recruits.

Step 5: Allow Enough Time to Recruit and Make Sure the Recruiter Uses It

The definition of "enough time to recruit" depends on the research target. For consumer groups with a high incidence level, one full week is the minimum acceptable time – people are extremely busy and are now being recruited more than ever. For B2B groups, I insist on at least two full business weeks to ensure full groups.I recommend three weeks or longer for groups with low incidences or for groups that include high-level executives. I also recommend longer than usual lead times for groups outside the US; language issues and time zone differences make it harder to monitor the recruit and respond to recruiter questions quickly, so extra time is helpful.

Just because the recruiter has your screener two weeks in advance, however, does not mean that they will automatically use the full two weeks. When getting bids from recruiters, I ask them when they will actually begin making calls. Then, when the recruit begins, I ask for daily updates from the outset. This is usually in the form of tally sheets on the first couple days, and then spreadsheets once qualified respondents begin to be identified.

Step 6: Select the Right Recruiter for the Job

The best recruiter for the job is one that has demonstrated success in recruiting the population in question. In selecting recruiters, I rely on my own personal experience, recommendations of moderator colleagues and clients, and, the Impulse Survey of Focus Group Facilities. If possible, I choose a recruiter that has recruited the specific population I need in the market(s) where the focus groups will be held.

I also find discussions with recruiters around suggested incentives to be quite helpful. When obtaining bids, ask recruiters to suggest the proper incentive level. Incentives that are out of line with your expectations and/or the incentives suggested by other recruiters tell you that either the recruiter doesn't know the market, is worried about successfully recruiting that group, or knows something you don't know. A discussion around how the recruiter decided upon an incentive recommendation can be quite insightful.

Step 7: Partner with Your Recruiter

One way to improve the success of recruits is to partner with the recruiter from the get-go. Don't just send a screener to the recruiter – ask the recruiter to review and comment on the screener before beginning the job. Invite them to challenge the screening criteria and the screener logic. For sure, many suggestions will be geared toward making the recruit easier but often recruiters identify real issues that need to be resolved. By accepting a project, a recruiter is making a commitment to deliver quality results. It is only right to openly discuss their concerns before asking for that commitment.

Partnership is a two-way street. Recruiters need to fill groups with qualified candidates but they need to do so with as few calls as possible to control their expenses. This conflict of interest puts them under pressure to propose less-than-qualified respondents. Therefore, moderators have to carefully assess the qualifications of every respondent to ensure a quality recruit. The best recruiting partners are ones that hold standards high and carefully point out any candidates that might not be perfectly qualified.

Step 8: Pay the Right Incentive

Setting incentives can be tricky. If the stipend is too low, it will be difficult to fill the groups. However, paying exorbitant incentives is as foolish as setting them too low. Not only is this a waste of money, I have seen instances where high incentives have been harmful to the research. For example, as word gets around that focus group recruiters are calling (and it does get around), you can end up with someone a level or two higher in an organization than the person you really need. I have also experienced occasions where I could sense the impact of high incentives on respondent behavior with discussions that seemed somewhat pretentious or practiced.

There are many variables to consider when setting incentive levels:

- The target. Consumers are less expensive than business people, lower level employees are cheaper than executives, and highly recruited groups such as doctors and IT professionals command a premium.
- Location. The largest cities are generally more expensive than smaller ones, and even more so than rural markets. Right now, parts of Europe and Asia are much more expensive than the US.
- Session length. We tend to utilize 3 1/2 hour long sessions and, thus, pay somewhat higher incentives than conventional moderators.
- Session timing. In some markets, daytime sessions will require slightly higher incentives than evening sessions.

Step 9: Stay on Top of the Recruit

The moderator should review spreadsheets of recruits as soon as they become available and continue on a daily basis right up to the session date. I like to review the first one or two with my client in case he or she catches something I might have missed. After that, I generally review all candidates daily, keep clients apprised at a high level, and only check in when there is a borderline candidate.

It's a good idea to provide all recruiters with the spreadsheet template you want used. A consistent format that you define across markets will allow the moderator and client to quickly see and act upon recruiting issues without wasting time trying to understand the various formats the recruiting firms might use.

When there are recruiting problems, you need to get tally sheets early on to identify where you are losing candidates. Tally sheets list the number of calls, responses, and specifically where on the screener candidates are failing to qualify. On difficult recruits, tally sheets show precisely why groups are not filling up. Sometimes, tally sheets simply show the recruiter is not making enough calls. Other times, they highlight a requirement that needs to be relaxed in order to fill the groups.

Step 10: Rescreen Before the Group

In some ways, rescreening right before the group is like closing the barn after the cow's escaped, but it is worth doing if it catches just one unqualified respondent. If the original screener was well written and unambiguous, you should lose few people in rescreening. I recommend a rescreener with just three to five of the most important qualifying questions. Facilities should compare the rescreener responses to the respondents' original responses and point out any differences to the moderator. The moderator and clients can then decide whether to accept, reject, or speak with the respondent to learn more.

Step 11: Meet & Greet Before the Session

No matter how good your screening process, it is nearly impossible to gauge personality and mood prior to the session date. People act differently in person than they do on the phone, so it's hard to identify the dominant, the shy, and, worst of all, the insane.

Most moderators recommend a complete separation of respondents and clients (indeed, most research facilities have been designed to keep clients and respondents apart) but we actually recommend having members of the research team show up early so they can meet respondents prior to our sessions. These brief meet-and-greet sessions put a human face on the research team, occupy respondents who otherwise sit around bored, and loosen up everyone including the client team. They also provide an opportunity to identify personality issues that might detract from the session. These pre-session introductions usually create a pleasant and cordial mood to kick off the session.

Step 12: Three Words: Early Bird Raffle

In the "Early Bird Raffle," respondents who arrive at the facility more than fifteen minutes prior to the start of the session are entered into a raffle for a small prize (usually an additional $25-$50). This not only has the intended affect of getting a full group to arrive on time (soothing your nerves) but also allows time for the Meet & Greet, which improves the quality of the recruit by allowing selection of the most qualified candidates.

About the Author

Frank Hines is a management consultant with over 30 years experience in international marketing, market research, strategy, product development, and innovation. He is an experienced focus group moderator and an expert in a broad array of qualitative research approaches. He has conducted research for a wide range of world-class clients including Bacardi, Dell, IBM, John Hancock, Kraft, McNeil, Pfizer, Pitney Bowes, Reebok, and Starbucks. Frank holds a BSME from Worcester Polytechnic Institute and an MBA (Magna Cum Laude) from Babson College.