Telephone surveys

Technote

Interviewer selection and training

The most important element of a telephone survey is the data collection instrument—the interviewer. Upon being hired, all interviewing staff complete a three-hour orientation session headed by our field supervisor. An interviewer's first two shifts are for training and screening. This ensures that we select only those who meet our qualifications. Introductory sessions involve training in all facets of telephone interviewing, from telephone etiquette to handling difficult respondents. We have developed a 30-page training manual as the basis for this instruction, which is available for clients to inspect.

The initial training session involves mock interviewing and is designed to provide interviewers with the basic techniques to do a good, unbiased interview. It also allows the field supervisor to identify those who may not be suitable. Approximately half of those who apply for work are not accepted and are screened out at the training stage.

Pre-survey training

Before going into the field, the interviewing team is thoroughly briefed by a senior researcher on the nature of the study. The team then completes a group review of the questionnaire, and the researcher and field supervisor answer questions and discuss potential difficulties. Next, interviewers perform trial interviews with one another to build familiarity with the instrument. Great care is taken to ensure that interviewers ask questions as intended and that all interviewers probe in the same way. Controlling variation among the interviewers is essential to building reliability and validity in the data collection process. Once interviewers are able to administer the questions consistently and smoothly, they each conduct two interviews over the telephone. A final review identifies any remaining problems.

Interviewer monitoring

Interviewers are continuously monitored by the supervisor, who randomly listens to interviews and watches the data entry. PRA gives interviewers detailed protocols with which to respond to questions about the survey. The client's identity is never revealed, unless permission is granted. Further, respondents are never pressured into answering questions and are always given a phone number and name of a senior researcher if they have questions. If a respondent has second thoughts about having completed the interview, he or she may call our offices and we will strike his or her information from the database. Only by observing the highest ethical standards can we ensure that clients are never exposed to adverse consequences resulting from the research.

Field operations

Telephone numbers are replaced in the sample frame only after extensive follow-up to ensure that every opportunity has been taken to contact potential respondents. This approach ensures sample integrity and a good response rate. We account for every number dialled, so the true response rate is known. Numbers are regularly dialled a minimum of five times on different days and at different times to ensure the greatest likelihood of contacting a household.

Interviewers are instructed to do the interview at a time convenient for the respondent (day or night). In addition, telephone numbers for which there is no answer are called at different times of the day to contact shift workers and others who are not home during the evening.

Our computer-aided telephone interviewing (CATI) system facilitates the management of call-backs and interview scheduling.

Analysis

All coding of open-ended questions is based on the following procedure:

- The first 200 completions are reviewed to form categories.
- Open-ended questions are coded based on these categories.
- Additional categories are added as necessary to capture the essence of responses. Whenever new categories are added, we review a subsample of alreadycoded forms to see if additional recoding is needed.
- All examples of “other” non-classifiable responses are recorded.

The demographic information collected in the survey is compared with the 2001 Census and other Statistics Canada information to ensure the sample represents the population. Weighting is used to compensate for any discrepancies between the sample and the population.

Summary

Our training and monitoring procedures significantly exceed industry standards. In our view, there is a major potential for error in the interface between interviewer and respondent. We will not compromise accuracy in data collection nor the confidentiality with which we treat respondents' information. Clients are always welcome to attend the training and to view the field operations.

PRA Inc. follows all guidelines of the Canadian Association of Market Research Organizations (CAMRO). Several members of our team are also members of the Marketing Research and Intelligence Association (MRIA) and adhere to its Rules of Conduct and Good Practice.

Additional readings

Dillman, Don A. (1978). *Mail and telephone surveys: The total design method.* Toronto: John Wiley & Sons.

Lavrakas, Paul J. (1987). *Telephone survey methods: Sampling, selection, and supervision.* Newbury Park, CA: Sage.

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