

# WHAT to EXPECT

## When Recruiting for Online Research

By Jennifer Dale

InsideHeads ▪ St. John, Virgin Islands ▪ [jdale@insideheads.com](mailto:jdale@insideheads.com)

**W**hen it comes to recruiting for any research study — qualitative or quantitative, in person or online — the ultimate goal remains the same: recruit the right audience for the right study. So, what makes recruiting for an online qualitative research study seem so daunting?

Perhaps it is baggage from years past. More than one client has told me that people lie online or that online participants are anonymous and cannot be verified. Whatever fears and inhibitions you or your clients may have about online qualitative research, recruiting need not be one of them.

### **Congratulations! You are the proud manager of a new online qual project!**

As with any research study, it is best to have a clear understanding of what your client expects, so begin with the end in mind. Before conceiving a study proposal, interview your client about the research objective, participant

requirements and recruiting options. For example, if your client comes to you to “test some ads,” dig a little deeper:

- How did the need to test the ads come to be?
- At what stage is the advertising development?
- In what format will the ads be tested?
- Exactly how many ad versions will you need to test?
- What key questions are being asked internally within the organization?
- How will the results from your fabulous analysis ultimately be used?

This kind of questioning is right up a QRC's alley. To design the most effective online qualitative research study, seek out the critical criteria from your client.

Follow that same line of questioning when determining the participant qualifications. If your client does not know, she will expect you to figure it out. Unfortunately, this kind of discussion can open up a can of worms and may reveal the need for some quantitative research first, but do not let that deter

- you from asking. You do not want to learn, after recruiting is complete, that your client neglected to mention the income requirement. What your client sees as obvious can also be obvious to you only if she tells you, so ask!
- If your client gives you specific demographics to recruit, from where did the statistics originate?
  - Are different marketing strategies planned or anticipated for different segments?
  - Should participants be pre-qualified based on some level of past, current or expected behavior or engagement with a product or service?
  - What are the reasons and implications behind a blind study vs. one where your client is clearly noted as the sponsor?

### **Do not be fooled into thinking that online studies require an online recruit.**

When it comes to online qualitative research, recruit as needed. Most people



in popular target markets today have access to some form of internet connection. Even folks with a dial-up connection can effectively participate in most text-based online platforms. With that in mind, any recruiting method can be used to screen for an online qualitative research study — phone, direct mail, in person or online. Choose the right recruiting method based on the unique needs of your study and target participants. Consider your available sample resources, budget, schedule and any other recruiting challenges your study may entail *before* deciding on the best recruiting method for your study.

Sounds simple enough, but beware: when sources are scarce or funds are tight, you and your client may be tempted to recruit research participants from what ultimately ends up being *<insert scary music>* Bad Sample.

You may not always smell disaster before it hits your study, but you will know when it arrives. Bad Sample is the enemy, and you are better off avoiding it from the start. Be on the lookout for one or more of these telltale signs that you could be headed for a rough recruit:

- Your client says she has a list or can get a list.

- You are told the list is up to date.
- You are told the list is accurate.
- The list is all sales contacts or prospects.
- The list contains only email addresses.
- Nobody knows the original source of the list.

### **It all starts with who you know.**

You will find the best prospects for recruiting online qualitative research studies from your existing contacts. Reaching out to your tried-and-true partners will give you the best possible outcome. Already work with a facility that recruits your focus groups in Texas? Get great response rates from a phone house in Phoenix? Give them a ring!

Most recruiters today, including brick-and-mortar focus facilities, have panels or panel partners that go beyond their own geographic boundaries. Start with the recruiters with whom you already enjoy working, and go from there. If they cannot accommodate you, they may be able to recommend, or partner with, a respected company that will.

You can also reach out to reputable online recruiters, who are much more qualified than list companies. The world of online recruiters is far better today

than in years past, as most list companies do not age very well. For online recruiter recommendations, ask another QRC, or check out [www.QUALocator.com](http://www.QUALocator.com) or [www.Greenbook.org](http://www.Greenbook.org). QRCA members can also access the Member Forum online, a great resource for insider tips.

If you do decide to recruit online for your online qualitative study, be sure to establish with the provider exactly what data you need to collect, as it most certainly will include personally identifiable information (PII), such as phone numbers, email addresses and names. That sounds obvious to QRCs, but not all online recruiters are familiar with qualitative research and may not assume that you need this critical info. Some sample suppliers work only with clients on the dark side (i.e., quantitative), who need only the numbers. These online recruiters have policies in place that actually prevent them from giving you any PII, designed to protect their panel members and their proprietary panel. Additionally, some online recruiters may require that you use their online platforms, which may or may not be what you want. So, just be sure to ask those important questions up front before leaning in for the kiss.

Thanks to a team at ESOMAR, we can all be smart buyers of research samples. Two very helpful articles specifically related to online studies — the recently updated *28 Questions to Help Buyers of Online Samples* and *ESOMAR Guidelines for Online Research* — can be found online at [www.esomar.org](http://www.esomar.org).

### If you have recruited for any qual study before, you have all the skills to recruit for an online qual study.

Whether you source the sample yourself or work with a recruiter who locates prospects for you, you will want to design an unbiased screening questionnaire. The fundamentals of the screener will be the same regardless of the recruiting method. If you are recruiting by phone or in person for an online study, be sure to screen for available internet connection and any other technological requirements (such as speakers, microphone or webcam). Over the phone, be sure to confirm the participant's email address, since email is most likely how you will communicate with your study participants.

If you decide your online study merits an *online* recruit, you will want to use an effective platform to administer the screening questionnaire — one that monitors or does not allow the respondent to change answers. Recruiters with online panels will have the capability to program your written screener for online administration. Some recruiters will require that you use their screening tool with their panel, so be sure to clarify what options will be available to you to DIY.

To set up your own online screener, you can use an online survey tool like SurveyMonkey or SurveyGizmo. Be sure to include questions for email address and phone number, two bits that can be painful to see missing from the spreadsheet when recruiting is over. In addition

to the survey tool, to DIY, you will need a sample source, as well as a method of inviting prospects to your online screener. If your sample sources are limited, remember that you are only as good as your first attempt, and bulk email blasts have never seen a high response rate. For the best results, consider using a service or app that specializes in sending custom emails and knows how to get through “spam” filters. Not to discourage the adventurous from giving it a try, just proceed wisely, and consider having a backup recruiting option.

A critical step in a DIY recruit will be verifying participant identities. The ESOMAR documents are a great resource and offer basic online recruiting standards that even DIYers should follow. Since we tend to work with a smaller number of participants in our qualitative studies, a reliable list-verify service can often be cost prohibitive.

Fortunately or unfortunately, a quick search online today can offer a world of information about a prospective participant. Whether your study is B2B or B2C, sites like Google, Yahoo, Whitepages and LinkedIn are steaming with publicly available information that can quickly confirm or deny a participant's age, location, phone number and more. Taking a look at respondent email addresses can also be quite revealing, as [surveysformoney@email.com](mailto:surveysformoney@email.com) should probably be left at the door. Whether you ask a participant to recall demographic information for confirmation or seek data online to corroborate his qualifications, verifications should be made before official invitations are sent.

Another bit of advice for pioneering DIYers: you may need some additional skills to prevent your participant profiles from looking like a scrapbook when you hand the goods over to your client. If you want snazzy-looking documents like ones that the better recruiters provide, but you are not into learning a

bit of graphic design, outsourcing to a report writer or someone skilled to add flare can keep your deliverables looking professional.

### Got communication?

Qualifying participants for some level of “online communication skills” is up to you, as it will depend on whom you are interviewing and the objective of the study. If needed or requested by the client, consider adding an open-ended question or two at the end of your screener that requires a thoughtful text response (either on or off the study topic) that will provide more insight for final selection.

Assuming you have followed a smart recruit up to this point, speaking to your participants before the online study will definitely bolster show rates. Regardless of whether you actually *recruit* by phone, reach out and give each invited participant a call. Some recruiters provide outreach by phone as a follow-up, or you can make the calls yourself.

Connecting with participants on a more personal level than just email dramatically increases their interest in the study and their confidence in you. Invited participants can be a little skeptical about an online research study, despite having gone through the screening process. Hearing your voice secures the relationship and assures each participant that you are real and interested in hearing his opinion in the online study. The phone call is also a great opportunity for participants to ask questions and for you to confirm receipt of your emailed instructions. If needed, you can also guide the participant through the online platform that you will be using, to address any functional issues in advance of your online discussion.

In addition to preparing participants, you should also prep your client with a clear understanding of what she will experience, including what she will be able to see and do, her role and responsibility during the online discussion (if any) and what your deliverable will look like. As with participants, giving a literal tour of the online platform to your client in advance will help eliminate confusion and give you both peace of mind throughout the online qualitative study. 📧

The fundamentals of the screener will be the same regardless of the recruiting method.