**Briefing Notes and Test Mode**

* Before you start conducting a survey you will need to be briefed on all aspects of the project to ensure the highest quality standards in our statistical results.
* Access Research conducts extensive briefings to make sure that every aspect of the survey is understood by our Telephone Interviewers.
* Briefings are conducted online so that you can review all the briefing notes before starting to work on a project.
* A supervisor will also be on hand throughout the shift to help clarify any questions you may have.
* If you have any questions regarding the briefing notes please speak with the trainer when you come in for the on-site session.
* During a regular shift, once you have reviewed and 'accepted' the briefing notes, you will be required to review the questionnaire in 'Test Mode'. Test Mode allows you to read through the entire questionnaire without actually making a live call.
* An example of the briefing notes has been provided below. Please review each point and make sure that you understand before continuing.

**Briefing Example**

*The following is an example of Project Briefing Notes:*

* This study is confidential - please do not discuss it with friends or relatives.
* Read all questions exactly as written. Do not paraphrase a question or reword it. If, at any time, the respondent does not seem to understand the meaning of the question, you must reread the question exactly as written. If the respondent still does not understand, just say, "However you interpret it".
* Do not lead the respondent by providing your opinion or agreeing with their response. Never comment on a respondent's answers.
* Answers to closed-ended questions are recorded by choosing the answer given by the respondent. Do not assume any responses. If the respondent does not answer one of the categories listed please reread all categories.
* Answers to "Other, Specify" questions are to be recorded verbatim.
* Make sure to read the script thoroughly when going through test mode, and pay special attention to instructions within the script.
* Please pay close attention to all the question-specific instructions in the script that should not be read aloud.
* Please be aware that the italicized text in square brackets is there for your use. If you need to clarify a question then read this text.
* Be aware of which lists and options are marked, "do not read."

**Preparing for the Survey**

**Once you have reviewed the briefing notes and read through the questionnaire in Test Mode you will be ready to start dialling.** Possibly the most important part of conducting a successful telephone survey takes place when the respondent says "Hello". Below are a few helpful tips for attempting to secure your respondent for a survey.

**Reassure the respondent**

Many respondents will simply refuse to participate as a reflex response. It is relatively easy to reply to this reflex response with a simple reassurance. When a respondent replies to your initial request with an immediate refusal your job will be to try to politely convince them to take part.

* **Explain that the survey will only take a short while. Regardless of length of the survey you can always emphasize that it will "only take" 5 minutes, or 15 minutes, etc (depending on survey length).**
* **Emphasize that we are not calling to sell them anything. This is the crucial point for convincing respondents to participate in the survey.**

|  |
| --- |
|  |
| **Dealing with refusals**  It is essential that you are prepared with an effective response when a respondent refuses to participate in a survey. If you respond to their objection in a calm and confident manner there is a good chance you can turn their refusal into a positive response. Below are a few examples of replies you can use when a respondent says "**No**".  **Rebuttals:**  **"I'm busy right now."**   * *Let me stress that this interview is very important and will only take about \_\_ minutes of your time. It is essential that your household be represented in our research. Would you please re-consider?* * *I understand that you are busy. However, it is essential that your household be represented in our research. The interview is very quick, would you re-consider participating now or when would a better time to call you back?*   **"What are you calling about?"**   * *Very simply, we will be asking questions about \_\_\_\_\_ and would be very interested in your opinions.* * *Access Research is a large research company dedicated to helping its clients better understand how consumers perceive ideas and products. We are not a telemarketing company and will never try to sell you anything. We are only interested in your opinions.*   **Voice presentation**  The first thing the respondent will notice is your voice. The style, volume, rate of speech, etc. you use over the phone will go a long way to determining your success. It's important to be aware of the effect your voice has on the respondent. Below are a few tips to help you develop a professional and attractive manner of speaking.   * **Rate of speech:**   Some people have a difficult time hearing and require you to speak slower and a bit louder. Others would prefer you to "get to the point." Identify the respondent's needs and try to meet them. Remember that even though you may have conducted the survey hundreds of times, the prospect is hearing it for the very first time; be sure to introduce yourself and the survey slowly and clearly.   * **Tone of voice:**   Vary your pitch and always sound confident with yourself and the survey you are conducting. You must convey a sense of importance in order to get respondents to value your call. After all, if you do not care, why should they? If you sound confident, people are more likely to listen to you. You need to convey a level of authority so that the respondent feels that you can be trusted.   * **Enunciation and pronunciation:**   Be sure you speak clearly so that every word can be understood easily. If the respondent cannot understand what you have said, then they will likely refuse.  **Scheduling Call Backs**  Many of our projects are conducted over an extended period and even when a respondent cannot participate we might be able to call them back at a time that is more convenient. If a respondent claims that "now is not a good time" then try saying:  ***"I understand. When would be a good time to call back? We greatly value your opinion and would be happy to get back to you at a time of your convenience."***  **Be Persistent**   * Persistence is perhaps an interviewer's most crucial attribute. * An interviewer must not be discouraged by respondents that say "No". * The tips listed above should help you develop your skills and turn negative responses into positive ones. * Any experienced Interviewer will tell you that they have completed surveys with respondents who initially said that they did not have the time or that they were not interested, etc. It may take a little time to find the most effective way for you to convince a respondent to participate in a survey, but the methods suggested above have proven themselves to be successful starting points.   **Let's review what we've covered so far:**   1. The Job: If you learn how to connect with people over the phone, and pay attention to the proper way to conduct your interviews then your job as a Telephone Interviewer can be an enjoyable and rewarding experience. 2. Every time you start work on a new project you must review the 'Briefing Notes' and 'Test Mode' for that project to make sure that you understand every aspect of the survey. 3. Reassure the respondents using our 'Refusal Recovery' responses. 4. Work on your 'voice presentation' by practicing your rate of speech, tone of voice, enunciation and pronunciation. 5. Be Persistent! An interviewer must not be discouraged by respondents that say "No". | | |
|  |  |  |

**Conducting a Survey**

* Once a respondent has agreed to participate in a survey your job is to ensure that the survey is conducted properly.
* An incomplete survey, or a survey that was not conducted according to the specifications outlined in the Briefing Notes will spoil the integrity of our statistics.
* Throughout the entire survey you must keep the attention of the respondent and make sure you are clearly understood. Below are some tips to help you complete a survey successfully.

**Listen**

* At times it can be difficult to actually hear what the respondent is saying. You must concentrate on every element of the call. Is this a good time to be calling? Do they sound tired? Enthusiastic? Bored?
* By being an active and sensitive listener, you put their concerns first and create the climate for a successful survey.

**Acknowledge and Respond**

* Interject an occasional acknowledgement of their response, and keep them informed of the progress of the survey ("We're almost finished. Just a couple more questions").
* Always respond with courtesy and respect no matter what the respondent is telling you.
* It's important that the survey is conducted in a timely manner so if the respondent gets off topic you should be prepared to politely refer them back to the question asked.

**Stay Positive**

You can never be too positive. The most successful interviewers are very positive on the phone. Positivity and enthusiasm are contagious. It's hard for respondents to respond negatively to a polite, positive and enthusiastic interviewer.

* Establish rapport with the respondent from the very beginning of the conversation by addressing them in a friendly and considerate manner.
* Take control of the call and guide the respondent through the survey with a patient and clear approach to each question.
* Remember that you are always in control of the survey. Even calls that are initially negative can change, and being positive is the best way to effect this type of change.

**Be Polite**

* This goes without saying. However, you can vary your level of formality from call to call. For instance, you can match the mood of the prospect if they are a little informal (though it is important to always maintain a professional demeanor).
* You are the voice of our company - so please make sure that our company's voice is polite and positive.

**Adding a Respondent to the "Do Not Call List"**

* Oftentimes, when contacting a respondent, they will mention that they are on the "National Do Not Call List".
* The "National Do Not Call List" (NDNCL) is designed to reduce the number of 'Telemarketing' calls that Canadians receive.
* Access research conducts market research, political polls and customer satisfaction surveys. As a result, we are ***exempt*** from the National Do Not Call List (NDNCL).
* We do, however, maintain an 'Internal' Do Not Call List.
* Respondents who request to be placed on our Internal Do Not Call List will not be contacted again by Access Research. (Unless we contact them on behalf of a customer satisfaction survey. For these surveys the client provides the list of numbers, and the respondent has given the client permission to contact them.)
* You should only code the respondent as 'XX' (which adds them to our Internal Do Not Call List) if they specifically request it. They must say 'Put me on your list'. If they only refuse, without requesting to be put on our list, then you should coded them as a 'Refusal' and not as 'XX'.

**Adding a Respondent to the "Do Not Call List" (cont'd)**

Here are some examples of how to reply to a respondent's request:

*If a respondent says****, "Stop calling me" or "Do not call me again":***

Then you will code this call as a 'Refusal' and the respondent will not be contacted again for that project.

*If a respondent says, "Take me off your list" or "Put me on your list":*

Then you will code this call as "**XX" (or "P9**" depending on the survey) and the respondent will be added to our 'Internal Do Not Call List.'

***Please note: It is essential that the respondent refers to a "list".***

* If you have any questions regarding our Do Not Call policy and procedure you should ask a supervisor or monitor for help.
* It is very important that you understand the distinction between the National Do Not Call List and our Internal Do Not Call List.
* It's also important that you understand the difference between a market research survey and a customer satisfaction survey, so if you have any questions at all you must speak with a supervisor or monitor immediately.

**Let's review what we've covered in this Section:**

1. Conducting a survey: An incomplete survey, or a survey that was not conducted according to the specifications outlined in the Briefing Notes will spoil the integrity of our statistics.
2. The importance of listening: By being an active and sensitive listener, you put their concerns first and create the climate for a successful survey.
3. Acknowledge and Respond: Always respond with courtesy and respect no matter what the respondent is telling you.
4. Be Positive: It's hard for respondents to respond negatively to a positive and enthusiastic interviewer.
5. Be Polite: You are the voice of our company - so please make sure that our company's voice is a polite one.
6. **Internal 'Do Not Call List': Respondents who request to be placed on our Internal Do Not Call List will not be contacted again by Access Research. (Unless we contact them on behalf of a customer satisfaction survey. For these surveys the client provides the list of numbers, and the respondent has given the client permission to contact them.)**

**Let's review what we've covered in this section:**

1. Refusal Recovery: You must always try to recover from an initial refusal. Remember to refer to the 'refusal recovery response' to improve your response rate.
2. Pay special attention to all 'Interviewer Notes'. These notes provide instructions on how to properly conduct the survey.
3. Read each survey question exactly as it is written. In order to maintain the statistical integrity of our surveys you are not permitted to 're-word' a question, or to interpret the question for the respondent.
4. It's important that we conduct efficient surveys. You must develop interviewing techniques that help move the respondent through the interview without too many delays. If a respondent is talkative, you must be prepared to politely interrupt in order to complete the survey in a timely fashion.

**Let's review what we've covered in this section:**

1. Refusal Recovery: You must always try to recover from an initial refusal. Remember to refer to the 'refusal recovery response' to improve your response rate.
2. Pay special attention to all 'Interviewer Notes'. These notes provide instructions on how to properly conduct the survey.
3. Read each survey question exactly as it is written. In order to maintain the statistical integrity of our surveys you are not permitted to 're-word' a question, or to interpret the question for the respondent.
4. It's important that we conduct efficient surveys. You must develop interviewing techniques that help move the respondent through the interview without too many delays. If a respondent is talkative, you must be prepared to politely interrupt in order to complete the survey in a timely fashion.
5. **Q: What are the rules about break times?**
6. **A:**Access Research does not pay for breaks. You can take your break whenever you like. However, when you are signing in you must let us know how long of a break you are planning on taking. Anyone working a shift of MORE than 5 hours must, without exception, take a 30 minute unpaid break. You have the choice of splitting this break in two. Anyone who works 5 or LESS hours has the option of declining a break, however, if you are working exactly 5 hours, you must either take a 15 minute break or leave 15 minutes early. If you change your mind and decide to take a longer or shorter break just let us know at the front so that we can ensure your timesheet is correct. Remember to put your project on PAUSE before leaving for your break.
7. **Q: What is the correct way to cancel my shift?**
8. **A:**24 hours prior to the beginning of your shift you may cancel your shift online. When you cancel online you press SUBMIT, then log out of the website and log back in to ensure that your shift was actually cancelled.
9. After 24 hours before your shift is scheduled to begin you can still cancel your shift online but you will need to provide a reason for the late cancellation. If you do not have internet access you can cancel your shift by calling in to the Supervisor Line (647-426-3900 ext.09632) and leaving a message. Your message MUST be clear, state your ID (twice), your first and last name, and which shift you are cancelling.
10. **REMEMBER: Your schedule is your responsibility; We cannot cancel your shift if we cannot understand your message or if your online cancellation does not go through. Therefore, always check your schedule online after cancelling to ensure that your shift was cancelled in the system.**
11. **Q: What are infractions? How are they different from warnings and how do they work?**
12. **A:**An infraction is not a warning. You can get an infraction for things like showing up late for your shift, cancelling a shift with less than 24 hours notice and for leaving earlier than you were scheduled to leave. A warning may be issued if you accumulate 3 infractions within a 30 day time period.
13. **Q. How does the probation period work?**
14. **A:**Once you are hired, you are automatically placed on a three month probationary period. This means that Access Research can terminate your employment without cause. If you are not spoken to within three months of your employment, you may assume that you passed your probation.
15. **What are warnings?**
16. **A:**You may will receive a warning for not conducting your surveys at the standards set here or by disobeying any rules and regulations set here at Access Research. **3 warnings are grounds for termination**.
17. **How do I record my bonuses?**
18. **A:**Your bonuses are automatically calculated by payroll based on the total time you worked on each project during one shift and total amount of surveys that were completed on that project during that shift. Bonuses are obtained by exceeding the target number of completions per hour for each individual project and these targets can be found on the website. Please remember that the target per hour for each project is based on the actual productivity of that project. Therefore, the project must be in field for a few days for a practical target to be set.
19. **Q: What is the maximum amount of hours I can work?**
20. **A:**The maximum amount of hours anyone can work in one pay period changes every pay period. It is calculated by the number of business day by 8.8. The amount of hours is posted every pay period on the board at the front desk.
21. **Q: Why do my scheduled shifts get cancelled?**
22. **A:**Please remember that since you are an Elect-to-work employee, shifts are not guaranteed. We may be obliged to cancel a shift when there is not enough work available. Understand that we try our best to avoid cancelling anyone's shift. Also, selecting the interviewers who need to be cancelled is based on the projects they know and their performance on such projects.
23. **Q: What do I do if I am set to work on a project that I don't know?**
24. **A:**If you are set to work on a project that you do not recognize please inform a monitor. DO NOT LOG IN TO THE PROJECT FIRST. You are not allowed to work on a project that you have not been briefed on and will receive a warning for doing so. If you log in to a project and realize that you have not worked on that project, stop working immediately and tell a monitor right away.
25. **Q: When can I get my paycheque?**

**A:**Paycheques are issued 5 BUSINESS days after the pay period ends. Business days mean weekdays excluding holidays. On this day, the paycheques are available ONLY AFTER 4:30 pm. For new employees, you will not get paid until you submit **your tax forms to the supervisor**.？？？ Paycheques can be picked up from the monitors at the front desk, Or you can choose to have your paycheque mailed to your home address.

1. **Q: What is a pay period?**

**A:**There are two pay periods in every month. The first pay period begins on the first of the month and lasts until the 15th. The second pay period begins on the 16th and runs until the last day of each month.

1. **Q: What do I do if there is an error on my timesheet?**

**A:**Interviewers should be checking their timesheets regularly to ensure that they are correct. If you find an error on your timesheet you need to speak with a supervisor immediately before the pay period ends.