



## WHITE PAPER: What Are They Thinking?

Optimizing the Data Collection Process for a Robust View of Your Business

## Introduction

When beginning a research project to determine what customers or employees think about a new product or service, or to determine their overall levels of satisfaction, designing the survey to optimize the data collection process can have an enormous impact on the final results. If all of the research is conducted online, at the end of the survey there may not be enough quota completes because representative responses have not come in. If the project is done all on-phone, you have greater control over the timing so that you can meet your deadline, but the costs for data collection per complete are higher.

A researcher not only must design a survey and identify an audience, but must also determine how best to go about collecting opinions and feedback from a target group. Read on to determine the best way to optimize the data collection process and gather the widest possible variety of feedback.

# Choosing The Right Mode

Choosing the best mode for a survey is an important decision. Let's focus on these quantitative methods in use today:

- **Phone Interviews (CATI):** Usually an outbound call to a target respondent. Interviewers are trained to nurture a caller through the entire survey, which makes this mode ideal for longer surveys and surveys for complex or difficult topics. Predictive dialing and optimized sample flow keep interviewer productivity high, making it easy to reach a wide range of customers in a shorter amount of time.
- **IVR:** Inbound or outbound call to a voice-activated computer survey. IVR is best used for short surveys with an engaged audience. In addition, it is a great methodology for sensitive topics and to capture the VoC.
- **Online Surveys:** Web survey, hosted 24x7, enables respondents with Internet access to participate whenever convenient. Highly engaging UX, with branding, gamification, and media inserts.

## SURVEY METHOD

\$ ONLINE OR IVR

\$ PHONE

## SAMPLE

## QUOTA



When designing a survey, researchers must look at which combination of modes is the most appropriate. Why not choose just one mode? Often, using just one mode will not achieve the desired quotas. For instance, consider when running an online surveys that although the majority of all US adults do have access to the internet, some percentage of the U.S. population over 65 and of rural areas, minority, high school graduates and lower income groups have limited Internet access. Yet 98% can be reached by phone. If these customers matter to your research, then phone-based data collection should be considered in the mix.

Surveys can be designed to allow respondents to choose the mode for answering the survey by selecting from online, IVR, or phone. A survey can also be designed to span more than one mode, which gives respondents a choice in the mode they want to use to provide feedback depending on the question. For example, retailers can provide a URL on a receipt and an 800 number to call for feedback. By offering a choice you'll increase response rates and collect insights from a broader audience.

In particular, many companies are using IVR to capture feedback after transactions. Respondents can click to call into a survey quickly and easily. In addition, by adding a second mode you can test for any possible mode bias in the responses.

## Offer Respondents A Choice

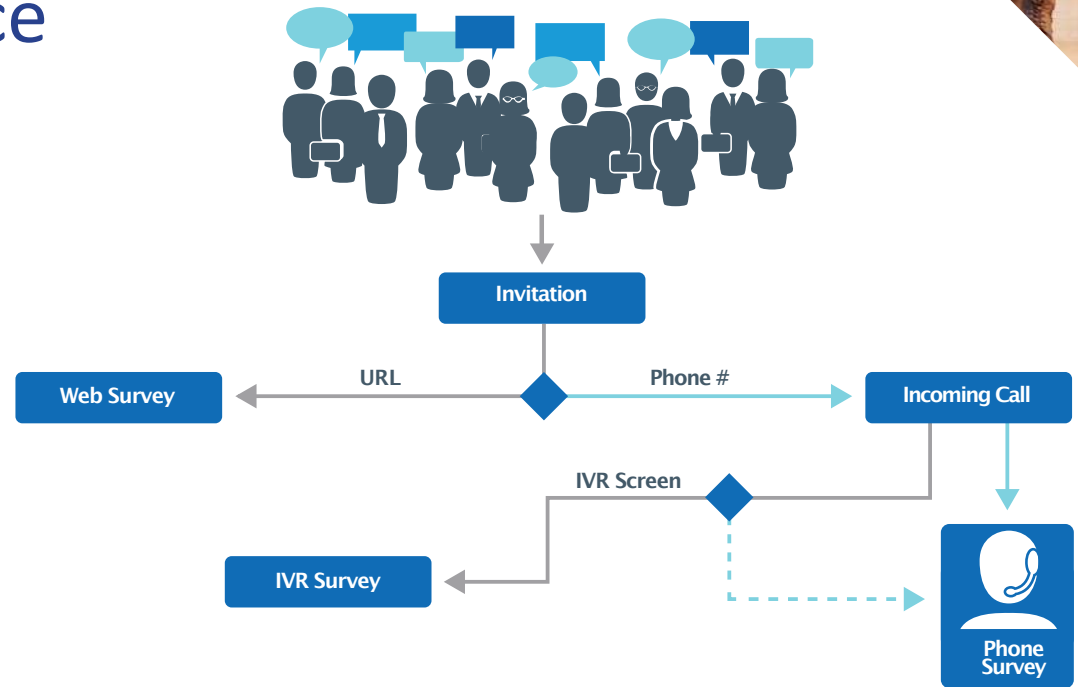
Many Voice of the Customer (VoC), Customer Experience (CX), and Enterprise Feedback Management (EFM) research will benefit from providing respondents with a choice of feedback mechanisms. Instead of relying solely on a web survey, researchers can now employ an IVR survey to collect the same data by phone. Other research that benefits from a multi-mode design include:

**Post Transaction Follow Ups** - These are generally conducted after a customer calls into a support center to get help or an inside sales desk to place an order. With a multi-mode survey, the caller can be transferred from a live interviewer to an IVR survey. Alternatively, once customers provide their information, their feedback and an NPS score can be captured via IVR.

**Point of Sale Experience** - Customers are commonly incentivized to provide their feedback once they have visited a store or made a purchase. By printing a URL and an 800 number on the receipt, the customer is provided two ways to complete the survey and collect their reward.

**Loyalty Program Member Survey** - Member profiles often allow customers to indicate their preferred method of contact and when a survey goes out to them, they are either given a URL or 800 number. The sample is divided by preference and the outreach is done on that basis.

With our Platform, regardless of how the data is captured, it is collected and managed in one central, easy to use dashboard so you do not have to worry about collecting the data from a range of tools.



# Choosing The Most Cost-Effective Mode

When faced with limited resources, focus on the opinions that come from the types of respondents who mean the most to your business. The amount you are willing to pay to capture their insights will differ by their strategic value to the business. As budget often dictates mode, here are some recommendations for choosing the best mode:

## Online Surveys

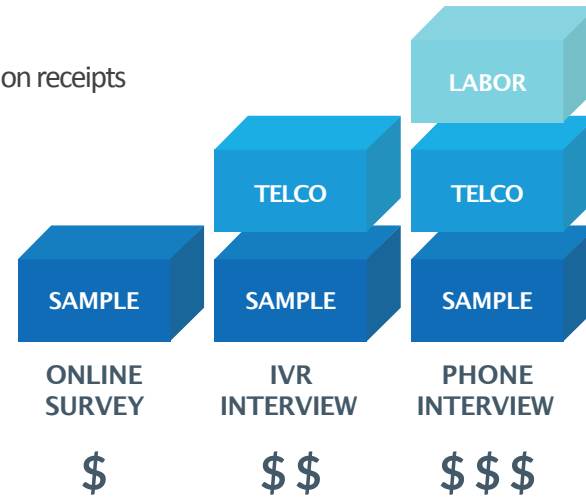
Online surveys work well for the majority of respondents. Online surveys can be printed on receipts or invoices and shared with all customers. This is the lowest-cost method.

## Automated Phone (IVR) Surveys

IVR based surveys are a good choice when targeting harder to reach demographics is a priority. It is the second most cost effective solution, and can be used for both inbound and outbound calls.

## Live Interviewer (CATI) Surveys

Phone (CATI) interviews are the most costly, but often provide a more in-depth picture. CATI gives researchers the option to gather more detailed insights with interviewers, probing for more information and using the extended question set.



# Increase Data Capture From Customers

By creatively designing a survey, marketer researchers can capture more data from more customers. For instance, with the growth of mobile callbacks, it is more important than ever to capture inbound calls. This growth accelerates the need to immediately answer and route those calls to the appropriate interviewers. Our Dialer, combined with the Multi-Mode Platform, can automate blending of inbound and outbound calls, using interactive voice response (IVR) to address the challenge of managing callbacks quickly and efficiently.

Only one system needs to be learned and just one survey needs to be built, making it easy to report on and analyze the data.

# Collecting Multi-Mode Feedback

Historically, multi-mode surveys have been difficult because each mode required its own data set. But with our solution the same survey can be used across all modes and all the responses are stored in a single data repository. Only one system needs to be learned and just one survey needs to be built, making it easy to report on and analyze the data. Research data collection operations can now enable processes that span not only modes, but technology, vendors and organizations. For example, phone interviewers can be in your call center, a partner's call center, or home based. The data collection processes can involve a single technology platform or you can build composite workflows across a mix of vendors. Regardless of where or how the data is collected, it is all stored in one central place.

# Designing And Managing Surveys

When it is time to design and manage a survey, the Platform gives researchers unprecedented control to modify live surveys to refine questions or ensure quotas are achieved. Our Platform has been developed to serve the needs of the most advanced research professionals conducting studies on a global basis and can perform the most complex of surveying activities. Just some of the features that project managers can take advantage of include:

- Utilizing “replicates” to collect a daily snapshot of results that represent the same quota makeup as the final product
- Utilizing “markets” for quota attainment and time-zone specific dialing activities
- Providing support for 24 time zones, including half-time zones
- Utilizing up to 960 markets for special functions and call-routing rules, such as assigning “Special Interviewers” who speak Cantonese to a particular market
- Your survey call center will have these controls available
- Leverage market weights to control the relative amount of calling to a particular market during the study
- Managing behavior by “weighting up” specific sample records. If there is a shortage of sample records in a particular market’s target sample, it is possible to pick up more records without completely shutting down other markets or setting their target quotas down
- Making dynamic adjustments to sample and calling instructions based on quota or market attainment without taking down the study
- Utilizing external data to identify mobile phones and treat them differently in your sample management process, managing these two types in separate files or within the same file, and sending specific instructions to the dialer based on the record type.
- Using DNC list management to upload, create and update DNC files that can be selected for any given project for any given project

## Valuable Customer Insights From Multi-Mode Surveys

As we can see, there are many advantages to offering multiple modes in one survey session with the same respondent. This approach can offer a more holistic and consistent view of consumer options and is especially helpful in developing new products and services.

Start benefiting from the multi-mode approach! Learn more about your customers in less time, get started today! Request a call from our expert at [MRC@enghouse.com](mailto:MRC@enghouse.com).

With our solutions designing and managing a multi-mode survey has never been easier. Market researchers can achieve precise quotas and operational control that enables users to optimize their complex or time-sensitive data collection processes in real-time and perform on-the-fly changes during a live survey without disrupting operations. The integration of our predictive dialer and IVR capabilities makes it easy to build highly flexible operations that cater to respondent preferences for interview modes, while ensuring project completion in the shortest time and at the optimal cost.

# About Us

Enghouse Interactive (EI), a subsidiary of Enghouse Systems Limited (TSX: ENGH), is a leading global provider of contact center software, services, and video solutions, serving thousands of customers for over 35 years. Enghouse Interactive solutions enable customers to deliver winning customer experiences by transforming the contact center from a cost center into a powerful growth engine.

Enghouse Interactive's core values – Reliability and Choice – are key differentiators in the global marketplace. Reliability speaks to Enghouse Interactive's reputation for consistently honoring its commitments to its customers, staff, partners, and investors. Choice is reflected in the unparalleled breadth of its CX portfolio, which enables customers to choose from a wide array of solutions, whether deployed on-premise, in the cloud, or on a hybrid platform. By leveraging a broad range of technologies and capabilities based on open standards, Enghouse Interactive simplifies the advanced integrations customers require.

Respecting local regulatory requirements, and supporting any telephony technology, Enghouse Interactive ensures that its customers can be reached by their customers – anytime, anywhere, and via any channel.

## Contact us to Learn More

With over 35 years of deep contact center expertise, our team of experts are ready to optimize a solution that's right for your contact center, today and tomorrow.

Visit us at:

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