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# VIEWS

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## REVISITING MASLOW:

What Models Can We Use to Understand and Explain Consumption Behavior?



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# Writing

## EFFECTIVE CONSUMER SCREENERS

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Creating the perfect screener is not based on a set of hard-and-fast rules, but rather a common-sense approach in understanding the interaction between a recruiter and a potential respondent, with the intent of recruiting the very best respondents for a study.

Q1. To write an effective consumer screener, the screener must capture... (READ ALL OPTIONS)

- a. All the information you want to know about a potential respondent.
- b. Just the minimal basics.
- c. Specific, targeted information about a potential respondent.

**D**oes this question format look familiar? This type of screening question is found on most consumer studies. The respondent must answer “correctly” in order to qualify, but nothing about this question leads the respondent to know which is a right or wrong answer. Only you and your recruiter know the answer (or answers) that will lead to terminating your potential respondent.

If your goal is to write an effective screener that results in the most appropriate respondents for your research, what is the best answer? Better yet, what makes a screener effective?

Consider, for instance, the first answer. Those of us who have been recruiting for a while have seen 20-page screeners that uncover more information about potential respondents than even their own family members know! In

my opinion, however, if you find yourself asking more than two “nice to know” questions (i.e., questions that are not used to weed out inappropriate respondents), then you are not using your time with a potential respondent efficiently, and you run the risk of losing respondents from “question fatigue.”

As for the second answer, if the respondent qualifies on the most basic questions in the screener, he or she will be qualified for the research, and any additional information can be discovered during the research itself. However, by making an extra effort to design questions that capture nuances to differentiate someone who is “probably a fit” from someone else who represents your ideal respondent, you increase the likelihood of generating actionable insights.

Thus, the third choice — designing questions that capture specific, targeted information that best defines who you want to interview — is our winning answer.

### For Whom Is the Screener Written?

Two people are involved in a screening process: a recruiter and a potential respondent. Your role is to design the

If you are looking for respondents who meet narrow demographic specifications (such as those with household incomes above \$250,000), then ask your demographic questions up front. If not, save them for the end.

screeener to facilitate the conversation between those two people and to make it simple for your recruiter to identify the type of respondent needed for your study. Since neither the end client nor the moderator will be screening the respondent, you and your research team must define exactly whom you do and do not want to recruit. Your criteria are then articulated into questions and structured into a logical sequence that is reflected in the flow of your screener.

The recruiter and your potential respondents may not understand industry lingo, and they may interpret non-specific terms such as “some” or “often” very differently. Therefore, be specific, and define what you mean or want. For example, it is better to ask how many times a week a respondent drinks soda than to ask whether or not he drinks soda frequently. “Frequently” could be once a month for one respondent and three times a day for another.

Write your questions in simple, easy-to-read language. Recruiters should be able to read the questions effortlessly, without having to figure out what you are trying to say. By writing easily interpreted questions, you reduce the chance that your recruiters and prospective respondents will misunderstand your meaning.

### How Long Should the Screener Be?

The shorter the screener, the more likely your recruiter will be able to keep a potential respondent’s interest long enough to invite her to participate. However, some studies require multiple questions in order to identify and choose the respondents you want to interview. In that case, the question is not how long the screener should be, but how clear you can make the screening criteria. Long series of questions that might or might not terminate a potential respondent can confuse a recruiter, and you may end up with the wrong mix of respondents. In addition, multiple

questions can annoy potential respondents by not being cognizant of their time constraints.

The key is to have enough questions to select respondents who are a good fit for your study and who hear enough to judge whether or not they want to participate in the study, and where the interaction has been long enough for your recruiter to judge whether or not each respondent can be an articulate interviewee. We will talk more about articulateness later.

### What Must Be on a Screener?

A screener is more than a series of questions. Make sure your screener includes a place for the recruiter to record your respondent’s name and contact information. (Due to privacy laws, your recruiter may be able to share only a first name and last initial with your end clients.)

Your screener should begin with an introduction. The purpose of an introduction is to set the stage for the questions. Most recruiters (and I agree) will tell you not to worry about the wording, since recruiters know how to introduce themselves. However, your introduction should contain a brief synopsis of what is about to be asked, even if it is stated as a general topic. For example: “Hello. I’m \_\_\_\_\_, calling from ABC, a market research firm. Today, I’m recruiting people for a web-page usability study. May I ask you a few questions to see if you qualify for this important study?” This gives the respondents a context for their answers.

Then, after your questions, include an invitation to participate in your study. The invitation should contain as much information as the client is willing to provide about what will be discussed during the research.

### How Do You Order the Questions?

The answer will depend on the type of study and your preferences. Here are

mine. First, ask the questions that will terminate the most respondents first. Many clients like to have all of their basic demographic, past-participation and security questions up front, then follow with the screener’s meaty questions and end everything with articulation questions. If you are looking for respondents who meet narrow demographic specifications (such as those with household incomes above \$250,000), then ask your demographic questions up front. If not, save them for the end. In medical or business studies where the answers to demographic questions rarely result in a terminate, start with your key questions, and leave everything else until the end.

Today, everyone is in a hurry, and most people (including prospective respondents) have ten other things competing for their attention. Ask the most important questions up front, when the respondents are at their freshest. If you ask an entire page of past-participation questions, only to find out two pages later that the person for your credit-card study does not have a credit card, you have wasted your potential respondent’s time and your recruiter’s time. Too much wasted time, and you run the risk of getting charged more.

Keep demographic questions together. Keep questions about subtopics together. The more natural the flow of your questions, the easier it will be for your respondent to follow and answer. The choppy your screener, the more openings there will be for mistakes to creep in.

One of my favorite examples of what not to do is found in many screeners written for alcoholic-beverage studies. First, there is a series of questions that ask whether the respondent drinks alcoholic beverages, which types of alcohol, how much alcohol, where he drinks the beverages and which brands he drinks. So far, so good. Then, the screener follows with a series of questions, and

each question includes a long list of possible answers. The goal of the screener writer is to hide from the respondent the end client's particular brand and type of alcohol. The unintended consequence is that the recruiter must keep flipping pages to go back to the chart of answers and scan down sequential columns to circle the correct answers.

Instead, it would be simpler and faster to ask one or more of those questions as open ended. If gin is the alcohol under consideration, with Bombay Sapphire as the brand that qualifies a potential respondent, consider eliminating the long list of gins and attendant brands. If a prospective respondent does not mention Bombay Sapphire, your recruiter terminates him. You have helped make the recruiting more efficient and maybe even saved a tree. After all, not all recruiting operations are computerized.

### What Are the Essentials, and How Do They Dictate Screener Length?

Let's take an example from a credit-card research project. Your client, a payment-card company, wants to recruit a group of its card members from its list, as well as a group of prospects from the recruiter's database. What do we absolutely need to know about these people before they sit down with the moderator?

First, let's look at the prospects. We will assume that the essential respondent specifications include people who make financial decisions, do not currently have a credit card with your client and are in a target demographic (for instance, they have household incomes over \$75,000). Remember the correct answer to the question at the beginning of this article? The meat of the screener should address these specifications as efficiently as possible. For example, you can write one

question to determine if someone is a financial decision-maker. To minimize the chances of your respondent picking the answer she thinks you are looking for, you can "blind" her by giving possible answers.

- Q2. Which of the following statements best describes your role in the financial decision-making process for your household? (READ LIST. ACCEPT ONE ANSWER.)
- I am the primary decision-maker with regard to financial decisions. (CONTINUE)
  - I share equally in the financial decisions. (CONTINUE)
  - I am not generally involved in the decision-making. (ASK TO SPEAK TO SOMEONE IN THE HOUSEHOLD WHO IS INVOLVED IN FINANCIAL DECISIONS.)

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Revealing the Maryland and Washington DC Mindset

Consider whether or not you wish to eliminate those who have extremely negative feelings about the end client. If yes, you can add a question to screen out those who feel that way.

IF NO ONE, THANK AND TERMINATE.)

- d. Doesn't know/refuses to answer. (TERMINATE)

This question is sufficient, and you do not need to follow with more questions asking about the roles of others or what their last decisions were. Trust that your question will nab the correct person.

In this example, your interviews will be brand specific. Therefore, consider whether or not you wish to eliminate those who have extremely negative feelings about the end client. If yes, you can add a question to screen out those who feel that way. Otherwise, in just a few additional questions, you can learn what you really need to know about credit-card usage from the prospects.

As for the demographics, ask just enough to ensure that you get the mix of respondents you desire. Just because they are on your screener template from past jobs does not mean they are necessary to this study.

When recruiting from the list of card members, you have the option to eliminate those questions that can be answered from the list's database. However, if you suspect that the list might not be accurate, use your screening questions to confirm that you have the type of respondent you want.

### The Perils of Going Too Far to Hide Your Product or Client (When Asking More Gets You More)

Suppose you want respondents who are interested in a new yogurt product. However, you do not want them to know that the product is yogurt, so you have it blinded among other similar

types of food. If you forget to ask if your respondents have allergies or food restrictions, you run the risk of accepting lactose-intolerant people who may be unable to provide the insights you need.

The more vital the secrecy of the research topic, the easier it is to write a screener that is too short. The solution comes in getting creative with how you word your questions. Open-ended multiple-choice questions can work beautifully here, since they can keep the research topic blind and still get the correct respondents. In the yogurt example, you could ask what types of snacks they like. Follow-up questions may include one on yogurt and another on one of their other snack choices. This way, you keep the prospective respondents unsure or unaware of your product.

### The Articulation Question

Many consumer screeners ask recruiters to eliminate prospective respondents who are not articulate, and some include an open-ended question from which the recruiter is asked to judge how articulate the response is. These open-ended responses help guarantee that a respondent will be comfortable and open during a research discussion.

There are two things to note here. First, trust your recruiters. If you are hiring a recruiting organization you use frequently, it is most likely because you have trust in their process. The recruiters will be able to glean a lot about a potential respondent's personality during the screening process, so a note from the recruiter that this person is terrific should hold weight.

If you do include an additional question to terminate those who are inarticulate, ask an open-ended question that flows from or somehow relates to the

topic. After all, the research interviews will not be discussing which people in history the respondent would like to invite for dinner, will they? No. They will be discussing credit cards. So, ask an articulation question that relates to credit cards or financial services. When you suddenly throw in a screener question about a topic completely unrelated to everything that has been already discussed, even the most articulate potential respondent can stammer for an answer.

### Has This Helped?

- Q3. Based on the information above, which of the following best describes how you feel about writing a screener?
- a. I feel I have been reminded about some important methods of putting together a user-friendly screener that will get me the right respondents.
  - b. I would like more detailed information, but I think this is a good start on the basics.
  - c. I do not think I learned anything from this article.

If you selected the first answer, that is what we were hoping for. If you selected "b," fair enough; let us know what else you need. If you selected "c," you are an expert already!

Creating the perfect screener is not based on a set of hard-and-fast rules, but rather a common-sense approach in understanding the interaction between a recruiter and a potential respondent, with the intent of recruiting the most appropriate respondents for a study. Screeners, at their best, are a quick way of ensuring that your respondents are the ones you need and want. 