

Strategies for Recruiting Target Respondents for Exploratory Interviews Prior to Questionnaire Design

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Outline

- Introduction: Innovation Survey Project
- What is the problem?
- Recruitment Strategies
 - Mailout & Outcomes
 - Telephone Follow-up
 - Use of FAQs
- Findings

The Innovation Survey Project

- OECD interested in expanding innovation statistics:
 - How US companies think about, manage, and account for innovation-related activities
 - Census Bureau in charge of conducting in-person and telephone interviews

Recruitment Goals

- Reach a decision-maker who can agree to participate in the project and assign people to assist
- Provide enough information to allow them to identify appropriate research participants

Recruiting Challenges

- Reaching high executives (CEOs, VPs)
 - Dealing with gatekeepers
 - Navigating through several levels
 - Finding the appropriate person
- Conveying the message
 - Purpose of the Project
 - Expectations
 - Gaining Cooperation

Strategies for Recruitment

- Mailout
- Telephone Follow-up with Non-Respondents
- Use of FAQs or scripted statements

Mailout

- Letters targeting executives by their names
- FedEx 2-day priority mail
 - Trackable
 - Different from regular mail
 - Conveys the idea of content being important

Letter Structure

Dillman (2000) offers a list of elements

- One page
- Critical Pieces of Information
 - ✓ Purpose and Goals
 - ✓ Appropriate Participants
 - ✓ Procedures
 - ✓ Target Dates
- Points of Contact
- Confidentiality of Information
- Action Item(s)



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Arlington, Virginia 22230



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4600 Silver Hill Road
Washington, DC 20233

June 29, 2012

[name]
[company name]
[street address]
[city/state/zip]

Dear [Mr./Ms./Dr. last name]:

We are seeking your company's assistance with developing relevant and reliable statistical measures of innovation. This international effort, coordinated by the Organization for Economic Cooperation and Development (OECD; www.oecd.org), is being undertaken in the United States by the National Science Foundation (NSF) and the U.S. Census Bureau. Our goal is to better understand how companies enhance their competitiveness and adapt to change. We will use the results to collaborate with other OECD member countries in developing valid indicators that realistically reflect the private sector's innovative activities and facilitate cross-national comparisons.

To ensure adequate representation of U.S. business practices, we would like to meet with knowledgeable people from your company to discuss the following areas:

- Product innovation – Developing new and significantly improved products.
- Production processes – Improving production to reduce cost, save energy, and increase efficiency.
- Organizational innovation – Adapting company structure to internal processes and the external environment, as well as fostering conditions for the generation and diffusion of ideas.
- Market strategies – Understanding and meeting the demands of diverse and dynamic customer bases.

We would like to arrange a meeting at a time convenient for your staff between August 6 and 24. We anticipate the meeting to last 1½ to 2 hours. To facilitate the participation of appropriate company staff, a Census Bureau researcher can assist your meeting coordinator by providing additional information, including a meeting agenda and specific topics for discussion.

All information shared in our meeting will be strictly confidential, as assured by Title 13, U.S. Code. No information about your company's processes, policies, strategies, or analytic procedures will be shared with anyone outside of the NSF/Census Bureau research team. External reports will include only summary analyses of commonalities and variations of practices across companies, without reference to any particular company.

Census Bureau researcher [Dave/Jen/Herman] will contact your office within the next 7-10 days to discuss the feasibility of meeting and to assist with coordinating the meeting with your company. If you prefer, you or your representative may contact him/her at (301)763-____ or [email].

While we recognize that your staff's time is valuable, we hope you agree that your participation in this research will help ensure an accurate reflection of U.S. business in this international endeavor. Thank you in advance for your assistance.

Sincerely,

John E. Jankowski

John E. Jankowski
Program Director
Research and Development Statistics Program
National Science Foundation

William G. Bostic Jr.

William G. Bostic Jr.
Associate Director
Economic Programs Directorate
U.S. Census Bureau

Mailout Outcomes

- Refusal
- Request for more information about the project
- Interest in participating
- No response, follow-up needed

Telephone Follow-Up

- Reaching executives
 - Looking online for contact information
 - Asking to speak directly to executive's office
- Dealing with gatekeepers
 - Enlisting them as allies
 - Conveying what is needed from them
 - Describing some benefit

Telephone Follow-up (cont.)

- Dealing with other gatekeepers
 - Describing the purpose and the type of person needed
- Talking to the decision-maker
 - Keeping it short and interesting
 - Using scripted text

Use of FAQs

- Addressed specific concerns from potential participants
 - What is this project about?
 - Why was our company selected?
 - What do you need from us?
 - Do we have to share strategic information with you?
- Provided consistent message among recruiters

Findings

- Mailout as a stand-alone strategy did not provide an adequate response
- Combination of strategies (mailout, telephone follow-up) maximized recruitment possibilities
- Consistent with Lynn & Sala (2004): Companies requiring multiple contact modes

Wrap-Up

- Use of mailout as a recruitment strategy
- If yes, was it effective?
- Any other recruitment strategies that were successful?

Thanks!

Questions, suggestions?

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