

How to Write Better Screeners to Get the Right Respondents

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Introduction



Michelle Landmesser

VP, Sales & Marketing

L&E Research

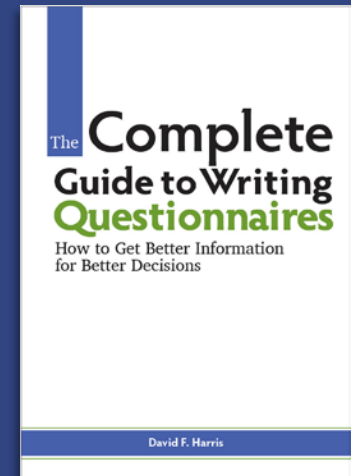
mlandmesser@leresearch.com

919.480.1233

Founder and President of: **Insight & Measurement, LLC**



David F. Harris
david@DavidFHarris.com
www.DavidFHarris.com
919.451.0786



Screeners are Questionnaires

Questionnaires

Screeners

Key Screener/Questionnaire Problems

Too Long

- Wear respondents out
- Quality of answers goes down

Unclear, Unanswerable, Difficult & Biased Questions

- Didn't screen for what you thought
- You get artificially positive information

Missing Screening Questions

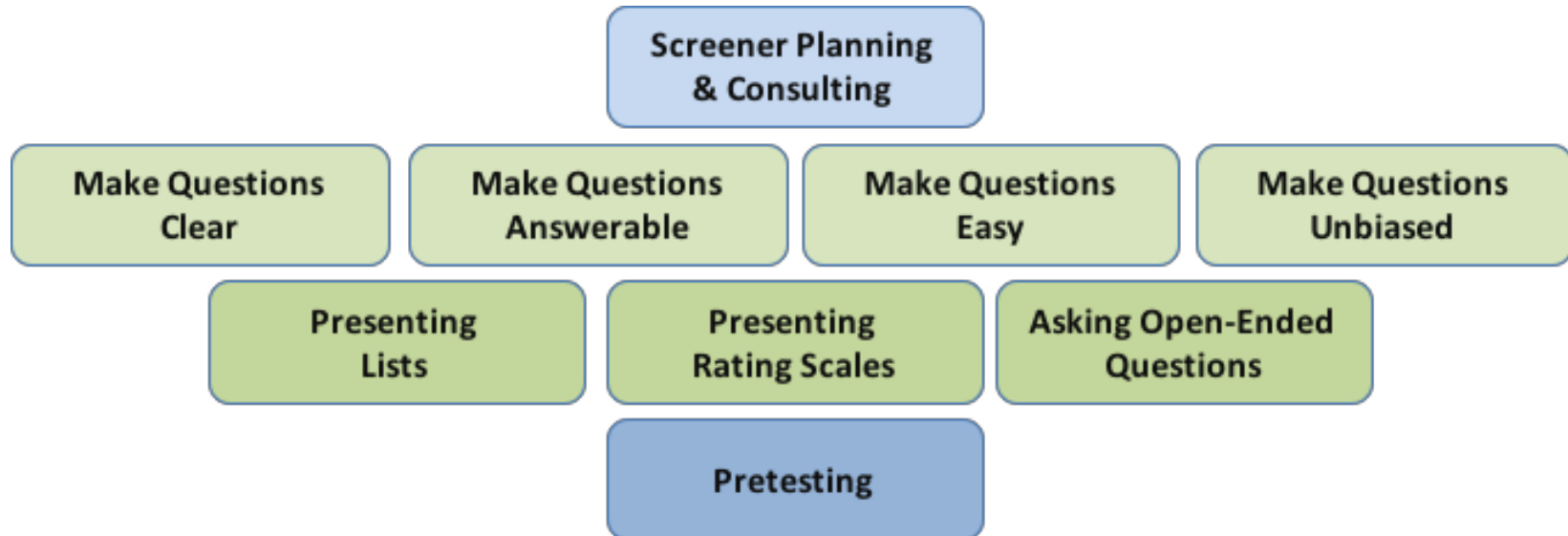
- “But we wanted people who actually...”
- “How come three of them...”

Webinar Objectives

After these next 45 minutes...

- Writing screeners requires good questionnaire design skills
- Talking to clients about *information needed* – not how to write questions

Framework



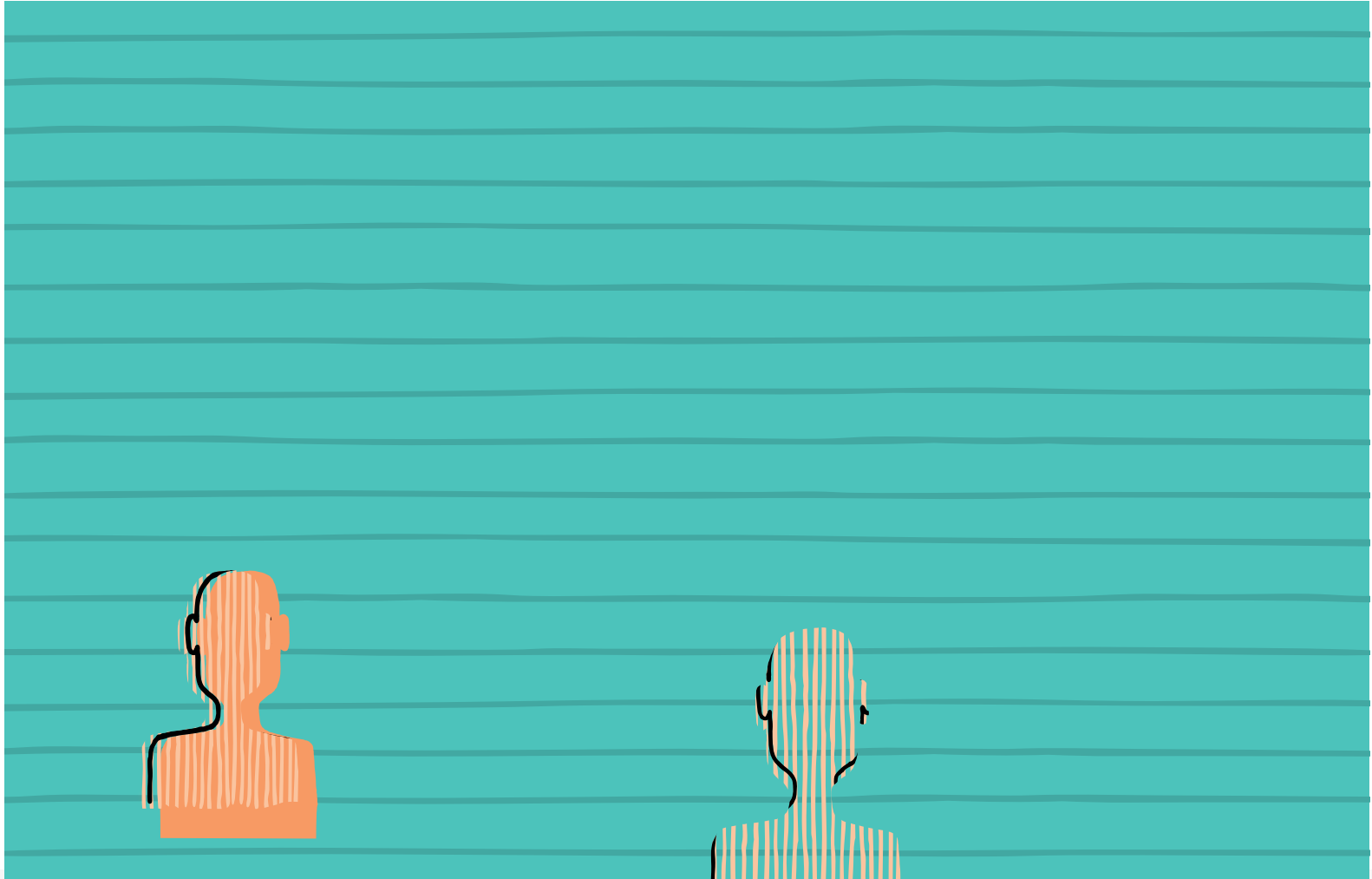
- A few very useful tools for scaling and avoiding acquiescence

Lots of information

Hope you take away a few key guidelines for how improve your screeners

Real learning involves applying to real projects

Writing Screeners/Questionnaires is one of the Most Difficult Forms of Writing



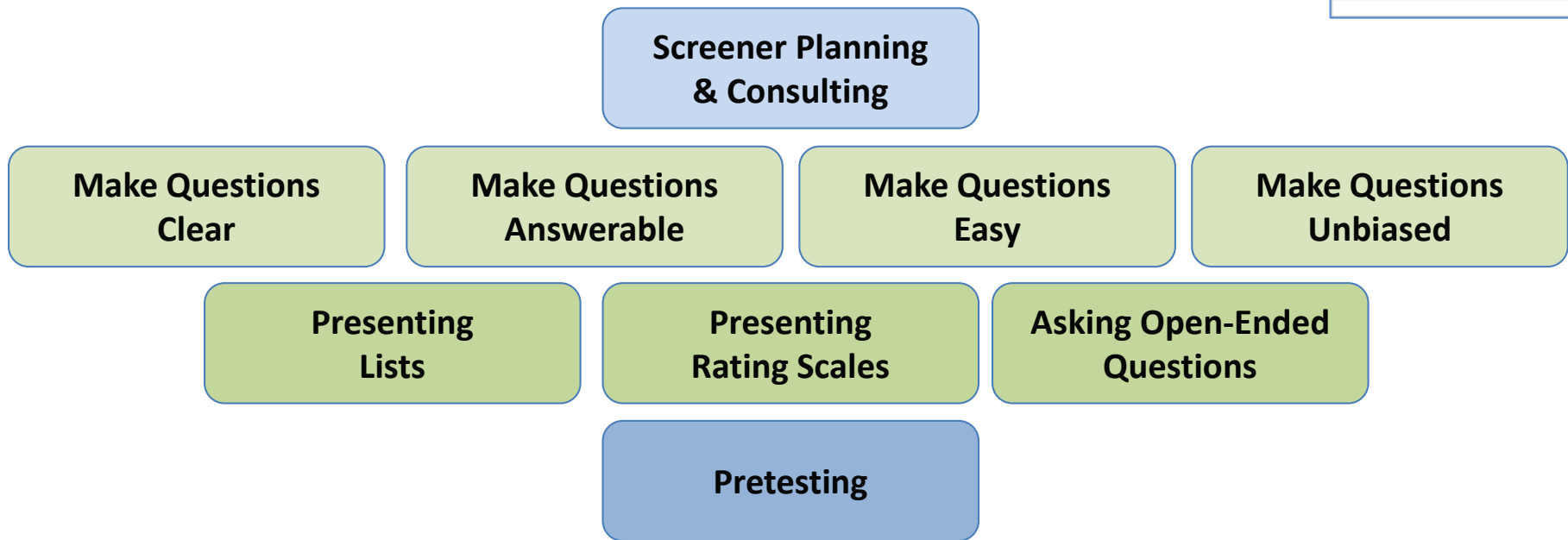
Q: How many cars do you own?

1. Did you, yourself take an aspirin within the past 7 days?
2. How many vitamin bottles are in your household?

This is far more challenging than meets the eye.

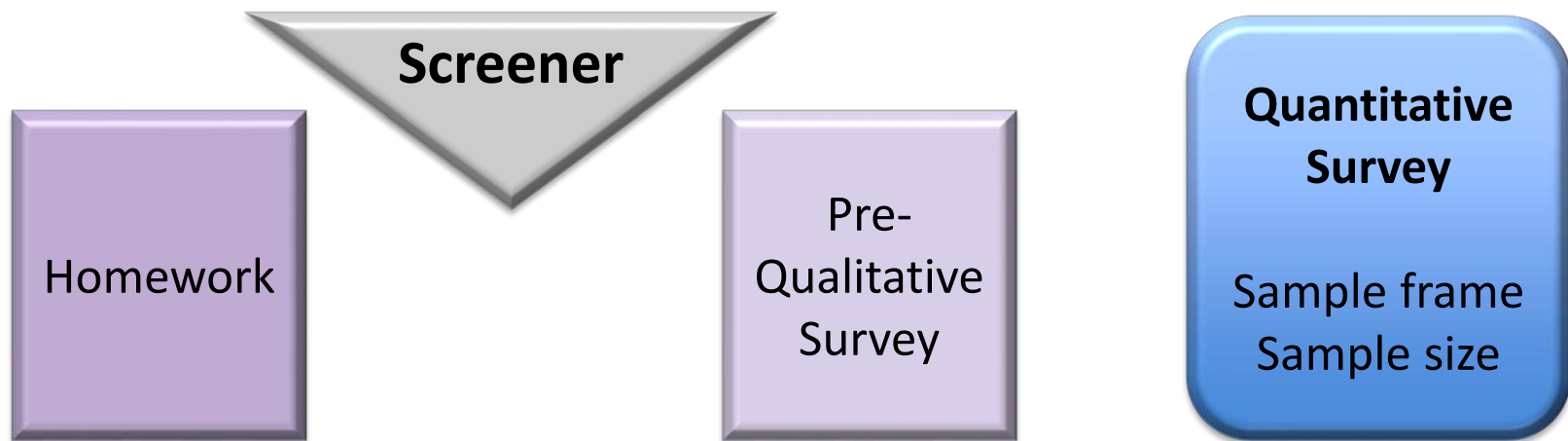
Learning how to do this better is extremely rewarding.

The Framework for Writing Screeners



Screening Planning & Consulting: The Rules

- The only questions that go in a screener are those ***necessary*** to determine eligibility
- Ask the questions that will ***disqualify*** the most people sooner rather than later
- Make questions as ***easy*** as possible
- By ***applying good questionnaire-writing and consulting skills***, we can get most screeners down to 10-15 questions



Screening Planning & Consulting

- Talk with colleagues about the information they need, not how to write the questions
- This is where we uncover what information we really need
- They are not trained to write questions – we are

Q: How many cars do you own?

Talk to Clients About Information Needed – Not How to Write Questions

How would you rate the technical skills of the computer repair person?

Screeners Planning & Consulting



Avoid “questionnaire design speak!”

Client question: “What percent of your most recent purchases of individually packaged food items are your priority choice?”
[KEEP IF OVER 50%]

In discussion, you might ask:

- “What do you mean by an “individually packaged food items?”
- “Are you interested in what they **like** the most, **buy** the most, or something else?”
- “Does it matter if they buy it for themselves, or for the family?”
- “What time frame?”

Talk to Clients About the Information Needed

Q: Which of the following best describes your role in purchasing food for the family?

- ☐ I am the primary shopper for food
- ☐ I share the responsibility equally with another person in the household
- ☐ I purchase food from the store but less frequently than others household members
- ☐ I am not involved in food shopping

Q: Who does most of the grocery shopping for your household?

- ☐ You
- ☐ Someone else in your household
- ☐ You and someone else in your household share equally in grocery shopping

More
conversational

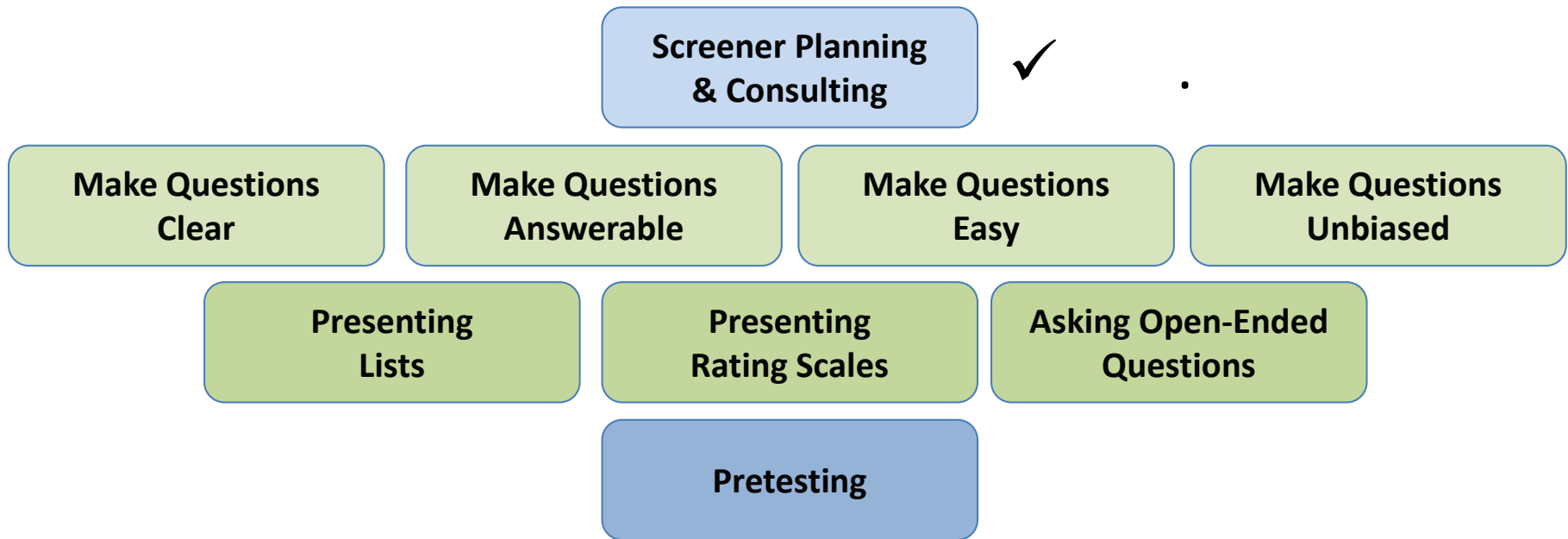
Your screener should feel like a natural conversation.

Screening Planning & Consulting

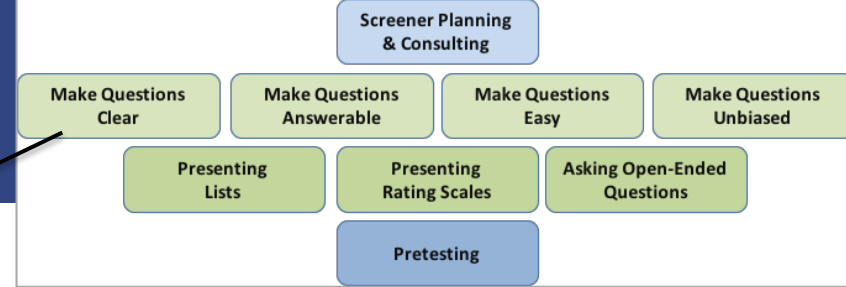
Wrestle with historical practices

“That is the way we have been doing it for years and we just don’t feel comfortable changing it.”

The Framework for Writing Screeners



Writing Questions



Make Questions Clear

1. State the unit of measurement.
2. Use the vocabulary of respondents.
3. State concepts clearly and concretely.
4. When using the word “you,” make sure respondents know to whom you are referring.
5. Make sure the question is really asking only one question.
6. When asking for percentages, make sure the base is clear.
7. Make sure the question stem and the answer choices match each other.
8. Use bold, underlining, italics, and/or capitalization to highlight key words and phrases.

Make Questions Clear

How frequently do you go to the post office?

- ☐ Very frequently
- ☐ Frequently
- ☐ Neither frequently nor infrequently
- ☐ Infrequently
- ☐ Very infrequently

Fred:

I go there **once a week**. That is pretty frequently, so I'll say **frequently**.

Joe:

I go there **once a week**, which isn't that much, so I'll say **infrequently**.

State the unit of measurement

In the past 30 days, how many times have you, yourself, gone to the post office?

times gone to post office

Make Questions Clear

In a typical month, about how many patients do you treat for blepharospasm?

___ # patients treated for blepharospasm

Use precise terms and phrases

In a typical month, about how many patients do you yourself inject for blepharospasm?

___ # patients treated for blepharospasm

Make Questions Clear

Q: When determining which car to purchase, were you at least 50% involved in the research that led to your final selection?

1. Yes, I was the primary decision maker
2. Yes, it was a shared decision
3. No (Is that person available? If Yes...)

Make sure the question stem and the answer choices match each other

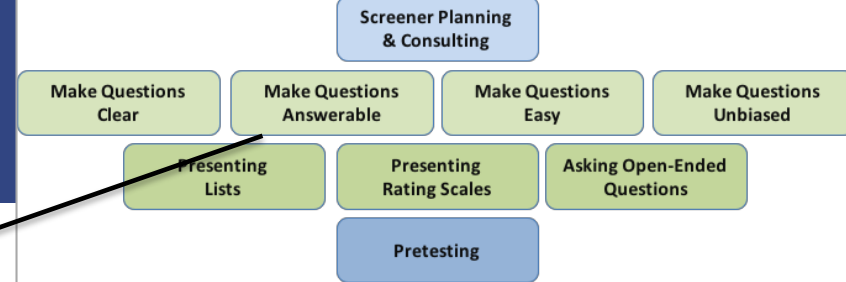
Make Questions Clear

- Which fast casual restaurant...
- Please rate the Account Service Specialist...
- Have you used OTC treatments for your condition?
- Have you been diagnosed with hypertension...

Make Questions Clear

- What percent of the time....
- How many customers...
- How many people are in your department?
- I plan and prepare most of the catering for clients.

Writing Questions



Make Questions Answerable

1. State time frames in which people can recall the information you need.
2. Don't assume regularity of behavior.
3. Don't ask people for information they simply don't have.
4. Screen respondents to make sure each question applies to them.
5. Make "Don't *know*" an answer choice if some respondents simply don't know the answer to your question.

Make Questions Answerable

Q: Thinking of the past 12 months, how often have you traveled by air?

☐ Less than once a month

☐ 1 to 3 times a month

☐ More than 3 times a month

Sue:

Three times in the past month for business, but the previous six months I only took one trip and that was for vacation.

Not sure how to answer this.

Jamie:

I haven't gotten on a plane in several months...but the first two months of the year I had to fly to the home office about five times.

Not sure how to answer this.

Don't assume regularity of behavior.

Make Questions Clear & Answerable

Do you **regularly** read the newspaper?

☐ Yes

☐ No

Do you **generally** exercise in the morning?

☐ Yes

☐ No

State the unit of measurement

State a time frame in which people can recall the information you need

Make Questions Clear & Answerable

I routinely read the labels for packaged food items to know the ingredients.

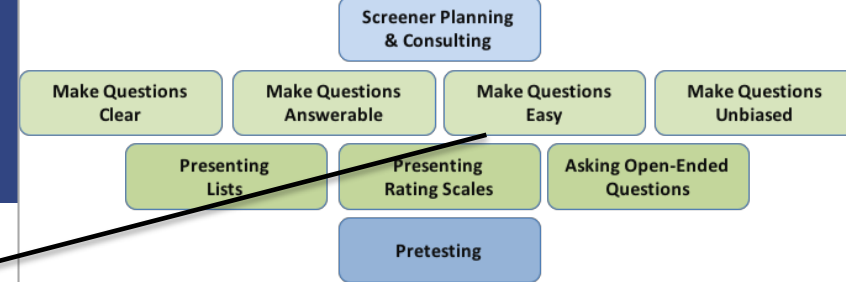


Make sure your question is only one question

Make Questions Answerable

- How many of your typical depression patients...
- How much do you prefer surfactants in your cleaning liquids?
- How much do you enjoy participating in sports or physical exercise?

Writing Questions



Make Questions Easy

1. Keep the question stem under twenty-five words.
2. When writing questions, say the question out loud as if you were talking to someone.
3. Limit the length of the screener/questionnaire.
4. Don't ask for more detail than you really need.
5. Soften questions with phrases such as *approximately*, *your best estimate*, or *as best you remember*.
6. Don't ask questions in the form of complex grids.
7. Add labels to answer categories.

Make Questions Easy

V1. Which of the following best describes your **mindset** for the type of truck you are shopping for?

- ☐ I am only shopping for a new truck
- ☐ I am primarily shopping for a new truck but considering a used truck
- ☐ I am primarily shopping for a used truck but considering a new truck
- ☐ I am only shopped for a used truck
- ☐ Not sure

More
conversational

V2. Are you shopping for a...

- ☐ Used truck only
- ☐ Used truck but will consider a new truck
- ☐ New truck but will consider a used truck
- ☐ New truck only
- ☐ Not sure

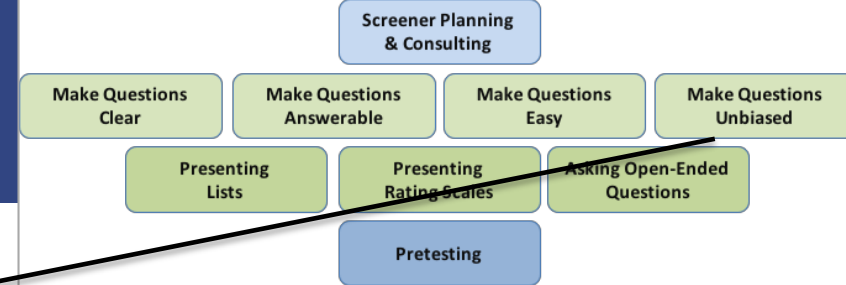
Make Questions Answerable & Easy

Q: In what year did you get your first cold sore? _____

Q: What was your age when you first remember getting a cold sore? Please give us your best estimate.

_____ Age when first noticed cold sore

Writing Questions



Make Questions Unbiased

1. Do not introduce ideas or opinions in questions that will influence responses.
2. Make sure that none of the answer choices is more loaded than any of the others.
3. Make clear that either a positive or a negative answer is equally acceptable.
4. Randomize answer choices if there is a possibility of order bias.
5. To get sensitive information, consider disguising the question, shifting the focus away from the respondent, softening the question, or collecting correlated data.

Make Questions Unbiased

Q: Please indicate how much you agree or disagree with the following statements.

Strongly disagree 1 2 3 4 5 Strongly agree

- a. Our company values its people.....1 2 3 4 5
- b. The company gives us the opportunity to train and develop.....1 2 3 4 5
- c. I get adequate feedback from my manager.....1 2 3 4 5

Replace agree/disagree scales with direct questions about what you really want to measure.

Scaling: Easier, Less Bias

Q: Please indicate the extent to which you agree/disagree with each of the statements below?

	Strongly disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly agree
I strive for perfection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am a confident person	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I dress more fashionably than most people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q: Please indicate how well each of the following statements describes you personally?

	Does not describe me at all			Describes me very well
	1	2	3	4
I strive for perfection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am a confident person	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I dress more fashionably than most people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Semantic Differential

Q: Below are pairs of words about that may or may not describe you. Please indicate how much better one word describes you compared to the other word.

	Describes me much more	Describes me a little more	Describes me a little more	Describes me a lot more	
Optimistic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Pessimistic
Casual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Formal
Idealistic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Practical

Reducing Bias In Scales

Q: How important are each of the following issues for you in the upcoming election?

	Not at all important		Extremely important		
Income inequality	1	2	3	4	5
Climate change	1	2	3	4	5
Gun control	1	2	3	4	5
Immigration	1	2	3	4	5
Campaign finance	1	2	3	4	5

Scaling: Max Diff

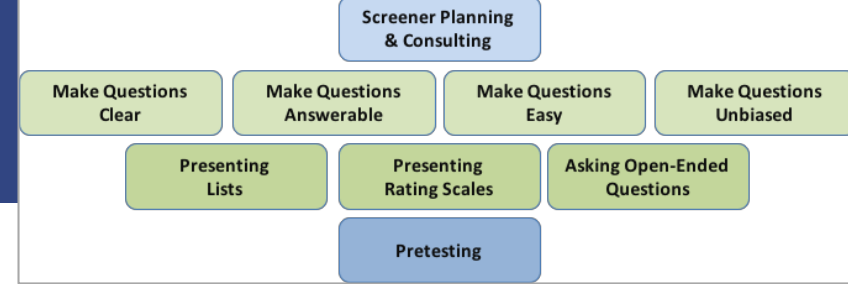
Q: Which of the following are the two least important and two most important issues for you in the upcoming election? Please select two items per column.

Least Important	Issue	Most Important
<input type="radio"/>	Income inequality	<input type="radio"/>
<input type="radio"/>	Climate change	<input type="radio"/>
<input type="radio"/>	Gun control	<input type="radio"/>
<input type="radio"/>	Immigration	<input type="radio"/>
<input type="radio"/>	Campaign finance	<input type="radio"/>

Scaling – The Scale Toolbox

1. **What do you want to measure** (e.g., likelihood, interest, satisfaction, or something else)? Consider how people think about the topic.
2. Should you use a **unipolar or bipolar** scale? Think about whether the dimension you are scaling has a natural opposite.
3. What will be the **length of the scale** (e.g., 5 points, 7 points, or some other length)? Think about how many levels people actually have in their heads.
4. If you have a bipolar scale, should you provide a **midpoint**? Does it make sense to force respondents toward one side of the scale or the other?
5. Will you **label** only the endpoints or also all of the middle points between the endpoints?
6. What will you **name the endpoints** (e.g., very satisfied and very dissatisfied, or extremely satisfied and extremely dissatisfied)?

Proper Pretesting



Pretesting

- Ask respondents to tell you in their own words what they think each question is asking. This way you will find out if the questions are working as intended
- Ask respondents how they came up with their answers
- Find out what comes to mind when respondents think about certain terms and phrases
 - “What does the term ‘*own*’ mean to you?”
 - “What does the term ‘*treat*’ mean to you?”

Pretesting Screening Questions

Cognitive Probe	Example
Comprehension / Interpretation	What does the term <i>outpatient</i> mean to you?
Paraphrasing	Can you repeat the question in your own words?
Confidence Judgment	How sure are you that your health insurance covers drug and alcohol treatment?
Recall Probe	How do you remember that you went to the doctor five times in the past 12 months?
Specific Probe	Why do you think that cancer is the most serious health problem?
General Probes	How did you arrive at that answer? Was it easy or hard to answer? I noticed that you hesitated. Tell me what you were thinking.

Source: Gordon B. Willis, *Cognitive Interviewing: A Tool for Improving Questionnaire Design* (Thousand Oaks, CA: Sage Publications Inc., 2005).

Pretesting Screeners

people your age

Q: Do you think ~~young people~~ who smoke cigarettes have more friends?

- ☐ Definitely yes
- ☐ Probably yes
- ☐ Probably not
- ☐ Definitely not

The Value of Pretesting

Strongly
Disagree

1

2

3

4

5

Strongly
Agree

1. Eating fruits and vegetables will help me live a healthier life.
2. I eat more fruits and vegetables than other people I know.
3. I never hesitate to go out of my way to help someone in trouble.
4. Generally, I like sweet foods.

Source: G. Willis, 2015. Analysis of the Cognitive Interview in Questionnaire Design: Understanding Qualitative Research. New York, NY: Oxford University Press.

More Tools: Traps

In quantitative surveys, we use eliminate “speeders” and “straight liners.”

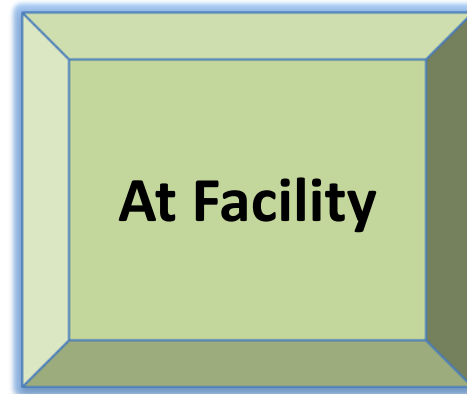
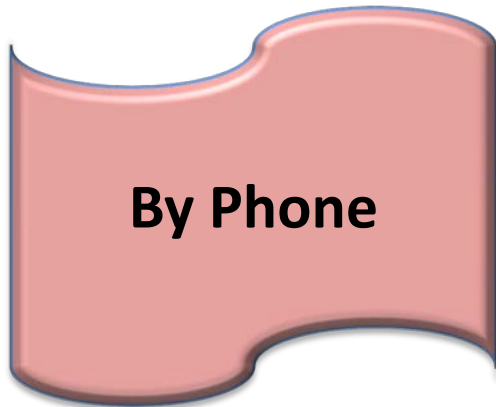
We can add trap questions:

Q: In the past 3 years, have you:

- Vacationed on Morgan Island? Yes No
- Purchased a Campolini vacuum cleaner? Yes No

More Tools: Re-Screening

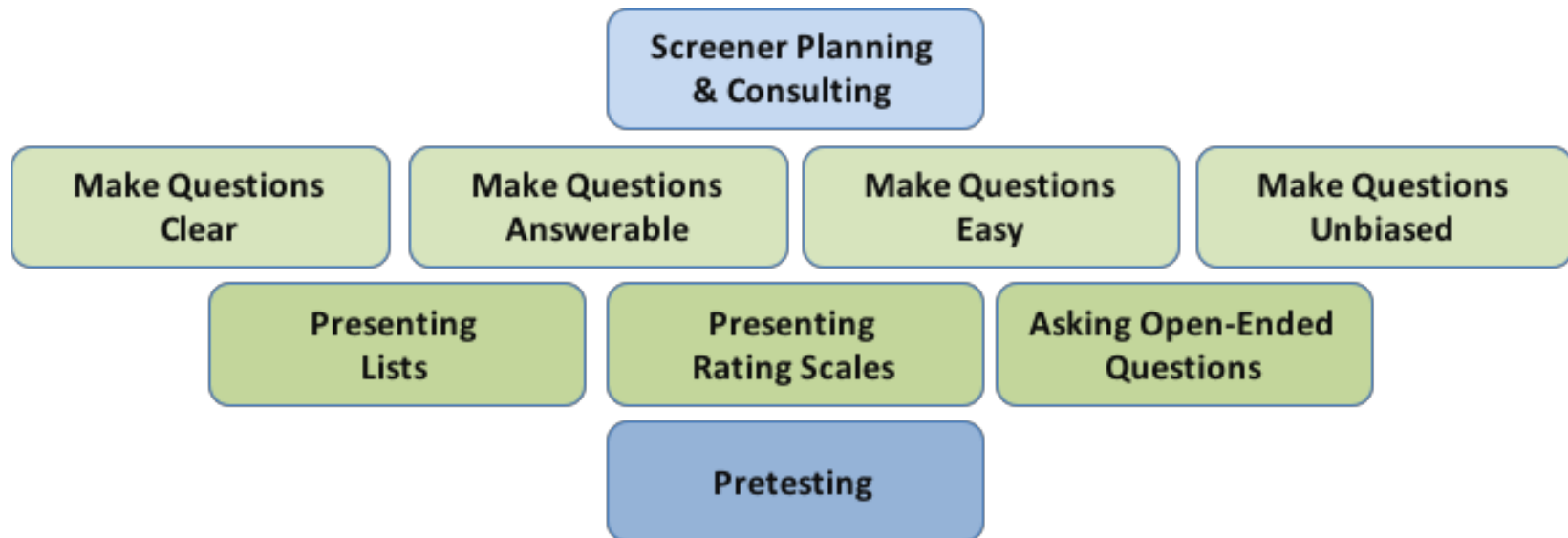
Re-Screening: Recruit a few extra, and interview them prior to research to make sure you get the right people



I Hope We Achieved These Webinar Objectives

- Writing screeners requires good questionnaire design skills
- Talking to clients about *information needed* – not how to write questions

Framework



- A few very useful tools for scaling and avoiding acquiescence

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