EBOOK
Challenging the Status Quo:
Driving CATI Operations to the Next Level
Driving CATI Operations to the Next Level

Sometimes simply maintaining the status quo is the easiest thing to do. If it ain’t broke, don’t fix it, right? But, if you are simply maintaining the status quo, how do you know there’s no room for improvement?

For example, when was the last time you thoroughly evaluated the technology that supports your CATI operations? Sure, you monitor KPIs and metrics. And perhaps, those indicators tell you everything is just fine. Unfortunately, “just fine” rarely (if ever) equates to revenue growth and a future-proof business.

Technology is at the heart of CATI operations. It facilitates your staff’s workflows, helps you deliver on the promises you’ve made to clients, and drives management decisions. Subpar system performance and technical limitations can have dire consequences for your business. Consider the following:

■ Cost of system downtime
■ Cost for each minute an interviewer wastes on inefficient workflows
■ Cost of not being able to rapidly scale your technology up or down based on demand
■ Cost of not being able to take advantage of new opportunities because your technology cannot handle it.

Perhaps, it’s time to assess whether or not the technology supporting your CATI operations fosters optimal efficiency, productivity, and scalability. This workbook will guide you through the process of assessing your current CATI technology and provide best practice advice on steps you can take to drive your CATI operations to the next level.
Let’s Get Started!

Before assessing your current CATI technology, it is important to establish a few simple best practices...

01

Don’t Overcomplicate Things: Managing the processes and systems required to support CATI operations is a very big job. Outdated, disparate technologies make it virtually impossible to effectively manage your business as you struggle to develop integrated reports or assess staff productivity despite all the time they are wasting switching between systems. Seek opportunities to streamline your technology stack leveraging a system that can accommodate multiple or all aspects of your research operations, from designing surveys, to panel/sample management, to quota management, monitoring, reporting, and more.

02

Don’t Settle for Subpar Technology: Despite the many challenges facing telephone research these days, CATI is still alive and well. Unfortunately, some technology providers seem to have forgotten that as they continue to decrease their investment in research and development for their CATI solutions. Be sure you are leveraging a technology that hasn’t forgotten your business needs. The best technologies are actively developing their CATI solutions and frequently deploying cutting-edge enhancements. Don’t settle for less!
Optimize Efficiency at Every Level: The more efficiently run your CATI call center, the more profitable your operations will be. Maximum efficiency can be achieved by implementing streamlined processes and reducing manual labor. Automation is key to streamlined operations! Leverage CATI solution features like predictive dialing, automated assignments and quota balancing to streamline processes while saving interviewers’ and supervisors’ valuable time and effort.

Always Deliver High Quality: Your business reputation depends on your ability to deliver high-quality results to your clients. Unfortunately, quality doesn’t just magically appear. You need to constantly monitor operations at two levels: interviewer performance and overall business performance (KPIs). The technology you use to manage your CATI operations must provide sophisticated tools to monitor performance at every level.

Future-Proof Your Business: Unless you have a crystal ball, it can be hard to know “what’s next”. At any time, your business may need to respond quickly to increased demand or scale back when business is slow. Be sure your technology is flexibly scalable to meet your business needs. Furthermore, while CATI research is known for being highly accurate, you never know when you will need to leverage additional data collection channels (web, face-to-face). Choose a fully integrated platform that facilitates all data collection channels using a single questionnaire.
Assess Your CATI Technology

Now it’s time for you to assess your technology.

We have identified the top 50 technology “must haves” to support highly efficient and effective CATI operations based on our 20 years’ experience supporting Market Research and CATI organizations around the world.

Use this scorecard to assess your current CATI technology solution. Check the box next to the features/capabilities delivered by your current CATI solution, then calculate the score in each section. Finally, add up the section scores to calculate your overall score to measure how well your CATI solution supports your operations today while providing a firm foundation for your business’ future growth.
**Dependable Architecture with Rapid Scalability**

Successful CATI operations need a system that is dependable enough to support day-to-day operations and scalable enough to grow rapidly when and how you need it.

- High level of system uptime (delivering 99.99% or greater)
- Cutting-edge technology and continuous product updates delivered without system downtime
- Single system that supports all aspects of your research business including panel and sample management, survey authoring, multi-mode data collection (telephone, web, face-to-face), analysis, and reporting
- Highly scalable to support 10 to 10,000 interviewers globally
- Dynamic seat licensing that reduces costs by allowing you to increase or decrease usage in line with workloads

**SECTION SCORE / 5**

**State-of-the-Art Survey Authoring**

Let’s face it, complexity happens! You need a system that can support any challenges your clients throw at you.

- Easy-to-use authoring that is able to accommodate all surveys, even the most complex
- A wide variety of question types
- The ability to update questionnaires and quotas on the fly

**SECTION SCORE / 3**
Efficient, Compliant Dialing

The long term success of your CATI operations depends on legal compliance and efficient operations. And it all begins with your dialer! Maximize efficiency through compliant, automated, and predictive dialing so interviewers receive more connected calls to increase their completion rates.

- Predictive dialing to maximize connections
- Automatically detect call outcomes such as a busy signal before the interviewer takes the call
- Flexibility to address TCPA compliance and silent call thresholds
- Custom caller IDs on a per survey/per contact basis

SECTION SCORE / 4

Powerful Sample Management

Inappropriate calls are a waste of time and money. Your technology should make it easy to make the best use of interviewer time and available sample.

- Advanced filtering features to prioritize calls
- Built-in “do not call” list handling
- Intuitive interface for managing call back rules
- Automated and manual call assignments
- Ability to efficiently handle complex calling scenarios

SECTION SCORE / 5
Advanced Quota Controls

Keep your fieldwork on target using advanced quota features that eradicate lost productivity by eliminating calls as soon as quotas are achieved and take pro-active steps to ensure that quotas are fulfilled.

- Support for 1000's of quota cells and interlocking quotas using several variables
- Automated quota balancing
- Support for cluster quotas
- Optimistic or pessimistic counting modes
- Tracking live and daily achieved counts
- Intelligent queue handling for closed quotas
- Email alerts when quota targets are achieved
- Easily monitor call availability against quotas

SECTION SCORE / 8

Efficiently Manage Remote and Global Call Centers

The best CATI solutions help managers successfully direct all their staff, no matter where they’re located.

- Administer multiple call centers from a centralized environment
- Create surveys that can be worked on across multiple call centers
- Support for remote auto-dialing and call recording/monitoring
- Allow interviewing agents to login and work from anywhere
- Localized console to support the needs of global call centers
- Conduct interviews in any language
- Automated time zones to simplify call times and shifts

SECTION SCORE / 7
Powerful Quality Control and Productivity Reporting

Protect your business’ reputation by ensuring that interviewers are working efficiently and meeting your high standards.

- Real-time alerting for high idle times, fast submissions, and low sample thresholds
- Reporting for agent and survey productivity with extensive filtering options
- Smartphone reporting for quotas and completions
- Real-time agent screen monitoring
- Record, export, and save interview audio and screen video
- Supervisor to interviewer messaging
- Supervisors can review interview data with optional editing permissions
- Review and edit verbatim responses with spell check
- Export, save, and send call recordings
- Recording playback that can skip to specific questions

SECTION SCORE / 10

Features to Maximize Field Force Efficiency

As the old saying goes, “time is money.” Be sure that your CATI solution has features that maximize productivity.

- Interviewer interface designed for optimum efficiency with comprehensive keyboard and mouse support
- Ability for supervisors to seamlessly transfer interviewers between surveys while they are logged in and working
- Group interviewers by skill type to facilitate efficient assignments
- On-screen instructions to help guide interviewers

SECTION SCORE / 4
Integration and APIs

Your system should eliminate needless administrative tasks, automatically documenting interviewing times and integrating data with internal applications such as fieldwork management or payroll systems.

- Programmable API to automate important administrative tasks:
  - Interviewer management
  - Agent assignments
  - Call history data exporting

SECTION SCORE / 4

OVERALL SCORE / 50

See How Your Current Solution Stacks Up

50 / 50  A perfect score! Very few CATI operations have such an effective and efficient technology solution supporting them! This CATI operation is leading the way and getting competitive advantage from its technology solution.

35–49  A score in this range is typical. It is likely that your CATI operations are chugging along with a few inconveniences. The bigger question that you must ask yourself, however, is whether or not this ‘average’ ranking is supporting your business in the most efficient way. Are the limitations called out in this assessment limiting your ability to automate, monitor, or scale your business? If you answered yes, you should consider looking for a new technology solution to support your CATI operations.

0–34  If your technology solution is lacking this many features, you can be sure you are missing opportunities and wasting money! It is high time you evaluated solutions better suited to your business needs.
Don’t Let ‘But’ Get in the Way of Progress

Even when the right choice is staring us in the face, we find any number of excuses to avoid change because maintaining the status quo is often the easiest way.

If the assessment in this workbook has uncovered failings in your current CATI solutions, you may be struggling with a few ‘buts’ when it comes to choosing a new solution. Of course, this is not to imply that these objections are without merit. It is imperative to address these challenges. As such, let’s take a few minutes to address the most common concerns.

**Tip**

**EASE OF USE**

When evaluating your next provider, be sure to choose a solution that is intuitive and easy to use. This will help minimize the inconveniences of switching providers.

**But...** We’ve been using this solution for years and the staff know how to use it already.

No one can deny that changing CATI technology solutions will have its challenges. If the software solution will help your staff to be more successful in the future, however, a temporary inconvenience can be easily overlooked. Staff convenience aside, as a business or unit manager, you need to look out for the business’ best interests. If your current solution is not helping to drive your business forward, facilitate streamlined operations, open the door to new opportunities, and provide the flexibility/scalability you need, you are losing more by staying with your current provider than you might by making the switch.
But... Some of my surveys are really complex and I have already programmed them into my current CATI solution.

Sure no one wants to throw away work you’ve already done, but you must consider the long-term benefits over the short term challenges. With the right solution, you will quickly recoup any sunk costs and pave the way to driving higher profitability through new efficiencies and opportunities. Finally, the best CATI solutions will be able to handle virtually any complexity you can throw at them while providing a simple user interface to facilitate developing your new surveys (even the hard ones)!

But... I am just not sure this is the right time to change solutions.

Business is constantly moving and there is almost never a “good” time to make major changes to your business. You cannot allow that to stop your business’ progress, however. While it is important to plan and try your best to minimize disruption, “it’s not a good time” should never be an excuse for inaction. If changing CATI solutions will help your business grow or otherwise improve, you need to act soon to maximize the benefits you can reap.

Tip

**MINIMIZE DOWNTIME**

As you evaluate CATI solutions, ask the vendors for their best recommendations to efficiently implement your new solution while minimizing downtime. Most vendors have done this many times before. They may have a variety of recommendations to help streamline your implementation.

Tip

**ASK FOR A DEMONSTRATION**

When evaluating CATI solutions, ask them to show you a demonstration of how surveys are designed in their platform so you can assess whether their interface is easy enough for your staff to use.
Not Sure Which CATI Solution is the Best?

Confirmit CATI is the telephone interviewing module of Confirmit Horizons, our flexible, multi-mode solution for Market Research and Voice of the Customer programs. Confirmit CATI is the most advanced telephone interviewing platform in the world, and has been built on 25 years of CATI experience. You can carry out Market Research and Voice of the Customer programs on the telephone, and manage all of the processes involved in telephone research. It also allows you to develop multi-channel programs by integrating telephone-based research with web, email, mobile, paper and face-to-face feedback.

Confirmit CATI enables you to:

- **Maximize productivity**: by making the best possible use of your people, your sample and your processes
- **Improve quality**: by running a highly reliable and integrated end-to-end CATI solution which provides comprehensive QA features and integrates seamlessly with a range of other data collection channels
- **React fast**: by providing unlimited scalability so you’re able to take on any project, large or small, and know that your solution can keep up.

Confirmit CATI is part of Confirmit Horizons, the world’s most advanced solution for Market Research and Voice of the Customer programs. Our CATI experts understand how critical reliable, scalable performance is, and how to help you get the most from your platform to maximize ROI.

“We were confident that Confirmit was best placed to meet our requirements, and that it would enable us to embrace the multi-channel, multi-touchpoint survey methodologies that are increasingly being requested by our global customer insight clients.”

Simon Glanville
Managing Director, Ronin Corporation

Ronin Corporation
“Confirmit has worked hard to ensure that we are always kept well abreast of the benefits of new upgrades, changes or developments from Confirmit, which helps us to make the most of what Confirmit has to offer and to stay one step ahead of the game.”

Richard King
Technical Director, BMG Research

“We believe that Confirmit Horizons is the gold standard in the industry today and that the software lends itself extremely well to the complexity that some projects require.”

Amit Gupta
Senior Vice President at Cross-Tab
If you’d like to learn more about Confirmit’s CATI solutions, check out our website.

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Confirmit is the world’s leading SaaS vendor for multi-channel Voice of the Customer, Voice of the Employee, and Market Research solutions. The company has offices in Oslo (headquarters), Chengdu, Grimstad, London, Moscow, New York, San Francisco, Sydney, Vancouver, and Yaroslavl. Confirmit’s software is also distributed through partner resellers in Madrid, Milan, Salvador, and Tokyo.

Confirmit powers Global 5000 companies and Market Research agencies worldwide with a wide range of software products for feedback / data collection, panel management, data processing, analysis, and reporting. Customers include Aurora, British Airways, British Standards Institution, Cross-Tab, Dow Chemical, GfK, GlaxoSmithKline, GMO Research, JTN Research, Keep Factor, Morehead Associates, Nielsen, Research Now, RONIN, RS Components, Sony Mobile Communications, Swisscom and The Wellcome Trust. Visit www.confirmit.com for more information.