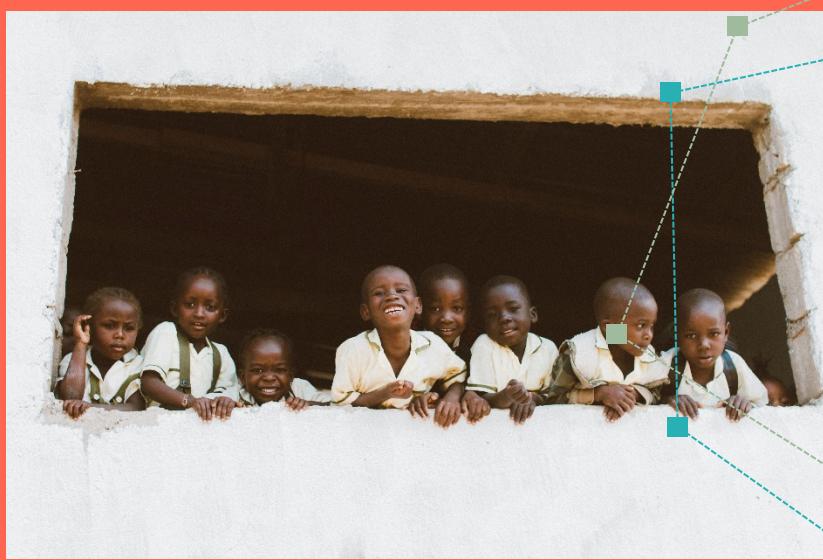


# Remote Survey Toolkit

**Prepared in Response to COVID-19**



# Introduction

For the past six years, we've been investing heavily in phone-based surveys to gather high-quality feedback and social performance data. Our belief has been that, when done correctly, phone-based phone surveys can get high-quality customer data at a fraction of the cost of traditional in-person surveys.

With this kind of data in hand, everyone working to make social change—whether governments, social businesses, NGOs, foundations or corporations—can be more flexible and responsive in the services they offer, allowing them to transform “social performance management” from idea into reality.

In March of 2020, the world was hit by COVID-19, and nearly every country and society around the world is practicing social distancing and placing restrictions on travel and face-to-face interaction.

One of the countless impacts of these changes is that nearly all face-to-face research has been temporarily suspended, and many of the organizations conducting this research are exploring shifting some or all of their work to phone-based surveys.

We want to help make this transition as seamless as possible and have put together this free guide to help. It captures many of the most important lessons we've learned in conducting phone-based surveys since 2014. While it is neither complete nor exhaustive, we hope that it serves as a useful resource to those who need it.

As important, we hope that the work of listening, especially to those most impacted by the many hardships the world has to offer, can continue through these challenging times.

If you have any suggestions or feedback about this document, or would like to contact us for further insight, please let us know.

Sincerely,

Sasha and Tom  
Co-Founders, 60 Decibels  
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# 10

## Tips for Remote Phone Surveys

by 60 Decibels

### Design

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#### **Shorten your survey instrument to 15 minutes ensure it is appropriate for a remote setting**

In our experience, the optimal length for a phone survey is less than 15 minutes. When we go much beyond this, respondents' attention drops off considerably and at times they will refuse to complete the survey. This translates to a written survey of maximum 30-40 questions. (Note: when numbering questions, be sure that each question + follow-up is labeled as a separate question).



#### **Get clear about the primary goals for your survey**

First step: agree on your priorities. Do this before you start drafting your survey questions. For example, you might want to find out: 1) who am I reaching 2) what impact am I having on quality of life, and 3) are respondents satisfied with the service I am providing. It's helpful to use the constraint of a shorter survey as an opportunity to have tougher conversation with relevant stakeholders about must-have versus nice-to-have data from your survey. Then use this moment to force-rank data that you absolutely must get from this survey and cut out any questions that do not directly align to your priorities.



#### **Ensure high-quality translation of your survey**

Use experienced translators for your survey, and make sure they understand local context as well as the language. Always cross-check the translation with someone who understands the perspective of the customers / beneficiaries you will be surveying. Without the benefit of being in-person, the language in your questionnaire needs to be as accurate as possible to avoid confusion or misunderstanding.

### Prep and Set-up

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#### **Put respondents in control of the survey: they should never be surprised by your call**

Always take steps to inform people that you are going to contact them. This could be in the form of an SMS in advance of the call, or a notification through other channels (e.g. a microfinance loan officer could communicate directly with her clients). Ideally, take this a step further by allowing the respondent to schedule the date and time of the phone call she'll receive. See p. 8 for resources on SMS providers.



#### **Establish context and rapport from the outset**

Trust is the building block for any good survey and establishing it over the phone is not easy. The challenge is, more than half of what we communicate is through body language, and that is missing in a phone interview. To overcome this, put extra time into training your enumerators in building rapport with the people they'll be speaking to. In addition, invest heavily in the opening script they read to ensure that it provides adequate context behind why they are calling and what the interview subject should expect from the call. Where possible, be specific about how engaging in the interview could ultimately benefit the respondent, for example: "your feedback will help [organization] improve its service to customers like you".

**Use high quality survey software + CATI to manage survey deployment and data capture**

There are many available software solutions, you'll need to pick one that best suits your needs. Some criteria to consider: will your enumerators always be online and with a stable internet connection? How sophisticated is your tech capability for writing scripts and software customization? Do you want to pay for software, or do you need a free solution? Will you use the software just to place calls, or will you do any data analysis in the software? Answers to these questions will help you zero in on providers that best suit your needs. Here are some companies to research further: Aircall, Five9, Callminer, and Zendesk Talk.

**In addition to generalized training for your enumerators, make sure you conduct detailed training for each individual survey**

For all 60 Decibels enumerators, we offer a 6-7 hour online training course that we developed in-house. We also provide another two hours of training for each project they work on. This project-specific training focuses on the specifics of the engagement, its context, and the purpose of the survey. In addition, we go through the survey instrument in detail, highlighting any questions they've not asked before and identifying questions we believe will prove particularly thorny.

**Always run a pilot to test your questions, completion rates, drop-offs, etc.**

One of the great things about phone surveys is that it's easy to check on progress in real time and quickly adjust survey questions as needed. We recommend completing ~20 surveys as a formal pilot before rolling out a full survey. When checking on the success of your pilot, make sure you look at the quality of the data—both qualitative and quantitative responses.

## Data Collection

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**Create a shared, live dashboard to record and track call progress**

When you have multiple enumerators on one project, it is key to set up the right organizational structures and policies to manage the project. This also helps keep track of response rates to ensure robust sampling. We ask researchers to update a shared database as they conduct calls, indicating when they made the call and the call status - i.e. completed, wrong number, need to call back, etc. From this data, we can estimate when we'll reach the target sample and can better understand the main barriers to completing surveys so that we can help researchers maximize response rates.

**Assess the quality of both open and close-ended questions**

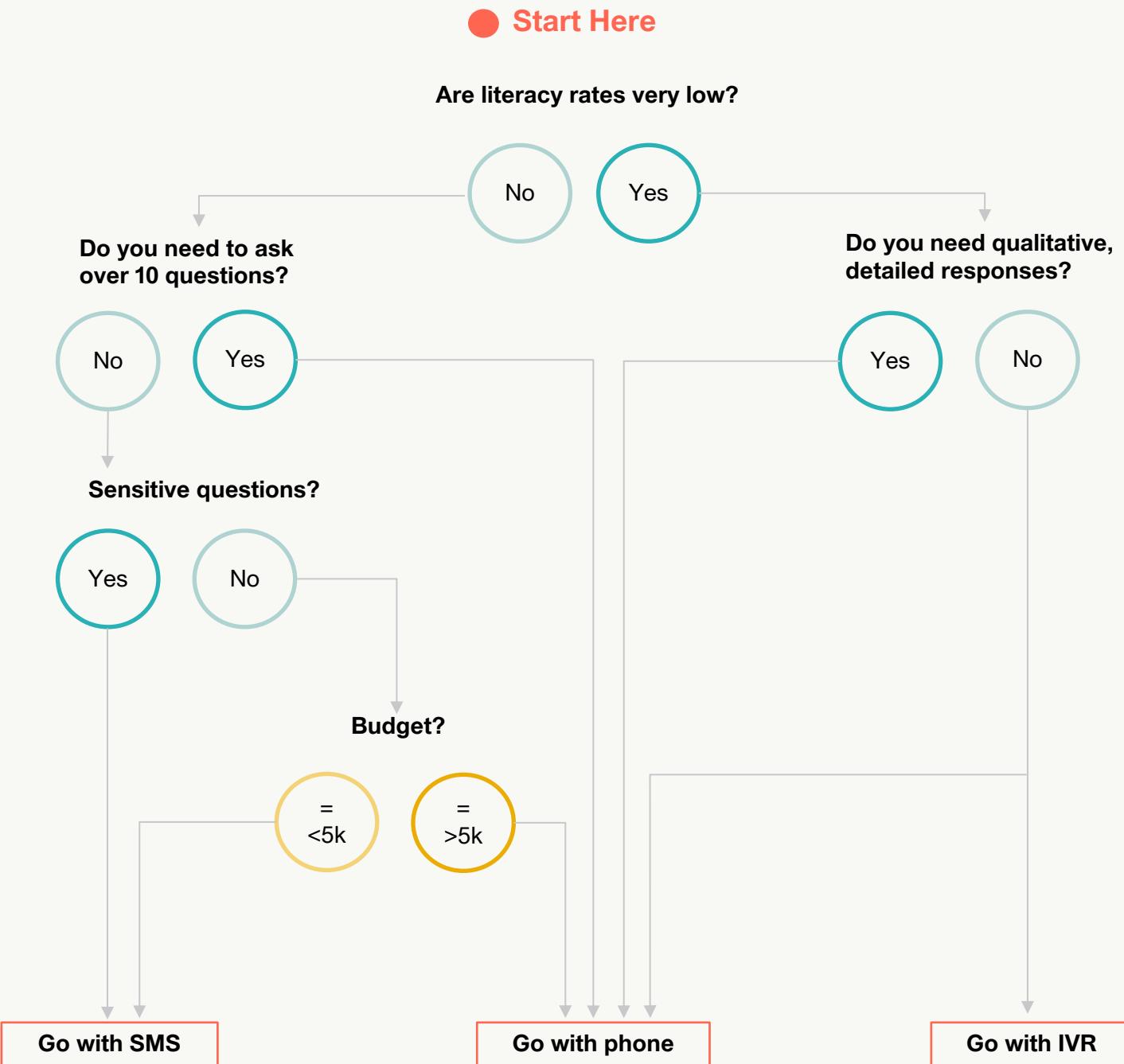
A quality open-ended response should be a verbatim transcription of what the respondent said. Enumerators should encourage detailed responses, probing where needed. When quality checking open-ended responses, be sure to look out for responses that: do not directly answer the question asked; are vague or too general; or are repetitive or too similar across different respondents. If you notice any of these issues, flag it immediately with the enumerator, provide detailed feedback, and monitor data from their subsequent interviews. As you are checking close-ended or multiple-choice responses, check the frequency of "other" responses (this might warrant the inclusion of a new answer option to enable higher accuracy), check for outliers in numerical values, and check for formatting errors.

# Part 02:

# Resources

# Cheat Sheet

## Choose Your Technology



# Cheat Sheet

## Technology Pros and Cons

Technology	Pros	Cons
Phone Calls	<ul style="list-style-type: none"> <li>• Works in low literacy contexts</li> <li>• Well-suited for a mix of qualitative and quantitative questions</li> <li>• Can get to the “why” behind quantitative questions with open-ended qualitative questions.</li> <li>• Generally richer data than SMS, IVR, email</li> <li>• When well-executed, can get very high (+50%) response rates.</li> </ul>	<ul style="list-style-type: none"> <li>• Need access to customer phone numbers</li> <li>• 3-5x more expensive than IVR &amp; SMS</li> <li>• Requires high-quality training of survey team</li> <li>• Must build in protocols to address inconsistent cellphone penetration in some locales</li> </ul>
SMS	<ul style="list-style-type: none"> <li>• Inexpensive</li> <li>• Can easily add in customer incentives to reply using an airtime bonus</li> <li>• Customer can complete at his/her convenience</li> <li>• Can include a handful of open-ended questions</li> <li>• Honest responses to sensitive questions</li> </ul>	<ul style="list-style-type: none"> <li>• Need high mobile penetration &amp; literacy rates</li> <li>• Surveys cannot be longer than 15 questions</li> <li>• Data is much less rich than phone, online</li> </ul>
Interactive voice response (IVR)	<ul style="list-style-type: none"> <li>• Works in low-literacy areas</li> <li>• Can get honest responses to sensitive questions</li> <li>• Much less expensive than phone calls from enumerators.</li> </ul>	<ul style="list-style-type: none"> <li>• Typically low response rate</li> <li>• Limited number of questions (10 maximum, ideally less than 5)</li> <li>• Customers don’t love the experience</li> <li>• Multiple choice only, not able to analyze qualitative feedback easily</li> <li>• Less customer-control over timing of survey</li> </ul>
Online	<ul style="list-style-type: none"> <li>• Inexpensive and can mass-mail</li> <li>• Survey can be longer than SMS</li> <li>• Can incorporate qualitative and quantitative responses</li> <li>• Potentially less disruptive to customers</li> </ul>	<ul style="list-style-type: none"> <li>• Low response rates (typically &lt;15% in developed markets)</li> <li>• Concerns about selection bias</li> <li>• End users must have access to computer / smartphone</li> </ul>
Sensors	<ul style="list-style-type: none"> <li>• Avoids bias inherent in self-reporting</li> <li>• Good for measuring frequency of predictable events e.g. usage patterns.</li> <li>• Example sensors: heat sensor (cookstove), light sensor (solar), sanitation sensor (toilet usage)</li> </ul>	<ul style="list-style-type: none"> <li>• Expensive</li> <li>• Must appropriately manage privacy concerns</li> </ul>

# Cheat Sheet

## Remote Surveying Providers

Name	Technology	Location	Website
60 Decibels	Phone, SMS, IVR	Global	<a href="https://www.60decibels.com/">https://www.60decibels.com/</a>
EngageSpark	SMS, IVR, Phone	Global	<a href="https://www.engagespark.com/">https://www.engagespark.com/</a>
Echo Mobile	SMS/USSD, Tablet	Global	<a href="https://www.echomobile.org/public/main">https://www.echomobile.org/public/main</a>
Viamo	SMS, IVR, Web, Apps	Global	<a href="https://viamo.io/about-viamo/">https://viamo.io/about-viamo/</a>
Awaaz.De	SMS, IVR	Global (Mainly India)	<a href="https://www.awaaz.de/">https://www.awaaz.de/</a>
GeoPoll	SMS, Phone, Focus groups, In-person	Global	<a href="http://research.geopoll.com/">http://research.geopoll.com/</a>
Elevate	IVR	Global	<a href="https://www.elevatelimited.com/">https://www.elevatelimited.com/</a>
Ajua	SMS	Global (Mainly Africa)	<a href="https://ajua.com/">https://ajua.com/</a>
Magpi	SMS, IVR	Global	<a href="https://home.magpi.com/">https://home.magpi.com/</a>
Ipsos Mori	Phone, In-person, SMS	Global	<a href="https://www.ipsos-mori.com/">https://www.ipsos-mori.com/</a>
Telerivet	SMS, IVR	Global	<a href="https://telerivet.com/">https://telerivet.com/</a>
U-report	SMS	Global	<a href="http://www ureport.ug/">http://www ureport.ug/</a>
Gallup	Phone, In-person, Panel	Global	<a href="https://www.gallup.com/home.aspx">https://www.gallup.com/home.aspx</a>
Nielsen	Phone, panel, SMS	Global	<a href="https://www.nielsen.com/ssa/en">https://www.nielsen.com/ssa/en</a>
Kantar	Phone, SMS	Global	<a href="https://www.kantar.com/">https://www.kantar.com/</a>

Note: This is not an exhaustive list as the number of providers in this field is constantly growing.

# Cheat Sheet

## Survey Rules Of Thumb

<b>Enjoyable and Ethical</b>	Put the respondent first: include an introduction with a statement of consent, summary of the survey purpose, and a close out text with personalized content.
<b>Who is responding?</b>	For phone surveys, keep in mind that shared cell phones are common. If you need respondent-specific information, check to see if you are speaking to the right person.
<b>Decision-focused</b>	Make sure your questions are relevant and actionable: what will you do with the information you expect to collect?
<b>Test test test</b>	Test the questions on yourself and then test questions with a small sample of locals: do they understand the questions right away?
<b>Short</b>	Try to keep SMS surveys below 15 questions; phone surveys below 30 questions.
<b>Mix it up</b>	Achieve a balance between open-ended and multiple-choice questions (and mix up the order).
<b>Scales</b>	If you are using a scale in your question, make sure it's appropriate for and understood by your audience. Likert scales often work best. Depending on your audience, experiment with smiley faces, thumbs up/thumbs down, etc.
<b>Statistical significance</b>	The size of sample required to achieve statistical significance can vary depending on the complexity of your study and population size - seek expert advice if needed. A good rule of thumb is that for population-level surveys without segmenting, a sample size of 200 respondents is a good target.
<b>Non-customers!</b>	Don't forget about speaking to non-customers: have they heard of the product / service or thought about purchasing it? If not, what's stopping them?

# Enumerator Checklist

## 7 Tips For A Successful Interview

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<input type="checkbox"/>	<b>Be In A Quiet Environment</b>	You should always be in a quiet place with good phone reception.
<input type="checkbox"/>	<b>Provide A Clear Introduction</b>	Set the tone for the interview by opening with a clear and friendly introduction.
<input type="checkbox"/>	<b>Inform The Customer</b>	Whether you're taking hand-written notes or recording the call, let the customers know. This is just good practice and helps them understand when there are pauses in the conversation.
<input type="checkbox"/>	<b>Be An Active Listener</b>	Be alert and active in all interviews. Listen closely and record accurately.
<input type="checkbox"/>	<b>Be Respectful</b>	Try to make the interview an enjoyable experience for the respondent!
<input type="checkbox"/>	<b>Never Ask Leading Questions</b>	Adhere to the survey script as closely as possible. If the respondent requires clarification on the question, make sure never to use leading questions in your prompts or examples.
<input type="checkbox"/>	<b>Take Your Time</b>	Give the customer the time they need to answer and clarify any confusion.

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# Meet Our 60dB Enumerator\* Network

\*Our community of people passionate about making it easy to listen to the people who matter most.

**200+**

60 Decibels has worked with more than 300 social enterprises, NGOs, corporations, governments and foundations. Most of our work is through voice-based surveys conducted by enumerators who we recruit and train in 30+ countries.

**40+**

## Languages

Amharic, Arabic, Assamese, Bangla (Bangladesh), Bemba, Bengali (India), Bisayas, Burmese, Chichewa, English, French, Gujarati, Hausa, Hindi, Igbo, Japanese, Kinyarwanda, Kiswahili, Krio, Luganda, K'iche, Kannada, Malagasy, Malay, Malayalam, Mandarin, Marathi, Nepali, Oromo, Oriya/Odia, Pidgin English, Portuguese, Punjabi, Q'eqchi, Shona, Siswati, Sotho, Spanish, Swahili, Tagalog, Tamil, Tigrinya, Telugu, Twi, Urdu, Wolaiytigna, Wolof, Xhosa, Yoruba, and Zulu.



# Part 03:

## Customer Question Sets

# About These Question Sets

- > In this section, we've grouped tried and tested questions into themes to make it easy for you to mix and match questions based on your needs and specific customer promise.
- > There are 2-5 questions in each question set, and each question has been tested with respondents.

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<b>Question Sets</b>		<b>What Are You Trying To Find Out?</b>
<b>1</b>	<b>Value Proposition</b>	<ul style="list-style-type: none"><li>• Who are the customers buying your product / service?</li><li>• What do they see as valuable?</li></ul>
<b>2</b>	<b>Customer Satisfaction</b>	<ul style="list-style-type: none"><li>• How happy are customers with your product / service?</li><li>• What would they improve?</li></ul>
<b>3</b>	<b>Meaningfulness</b>	<ul style="list-style-type: none"><li>• Is your product/service actually having a meaningful impact on your customers' lives?</li></ul>
<b>4</b>	<b>Poverty Profile</b>	<ul style="list-style-type: none"><li>• What is the income profile of your customers? What % of them live below the poverty line?</li></ul>
<b>5</b>	<b>Customer Archetypes</b>	<ul style="list-style-type: none"><li>• What attitudinal / behavioral characteristics are common in your customers?</li><li>• Are they more risk averse? More aspirational?</li></ul>

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# Using These Questions For Data-Driven Decisions

- > The question sets are tightly connected to a desired action and enable companies to make better, more informed decisions.
- > This ultimately drives improved outcomes for customers – both in terms of satisfaction and loyalty as well as social impact.

## Data needed to make informed decisions:

**Desired action:**

Question Set:	Value Proposition	Customer Satisfaction	Meaning-fulness	Poverty Profile	Customer Archetypes
Amend design of product / service to better meet customer needs	●	●			
Align marketing messages to value prop that resonates most with customers	●		●		
Make quick-win changes to improve customer satisfaction		●			
Provide donors/investors with real impact data; access additional grant funding			●	●	
Identify ways to reach more low-income customers	●			●	
Target customers more effectively along attitudinal dimensions					●

# Question Set 1.

## Value Proposition

Use this question set to understand:

- > Reason for purchasing
- > Perceived value for money
- > Quality
- > Top value drivers

Q •	Why did you purchase (product/service)?
Q •	How would you rate the value for money of (product/service)? <ul style="list-style-type: none"><li>• Very good</li><li>• Good</li><li>• Fair</li><li>• Poor</li><li>• Very poor</li></ul>
Q •	Please explain your answer
Q •	How is the quality of (product/service) compared to the (product/service) you were using before? <ul style="list-style-type: none"><li>• It is better</li><li>• It is the same</li><li>• It is worse</li></ul>
Q •	What do you value most about (product/service)?

# Question Set 2.

## Customer Loyalty & Satisfaction

Use this question set to understand:

- > How likely your customers are to recommend your product/service
- > Suggestions for improvement
- > Customer experience and satisfaction

Q •	On a scale of 0-10, how likely is it that you would recommend the [company] (product/service) to a friend, where 0 is not at all likely and 10 is extremely likely?*
Q •	Can you please explain your score?
Q •	How do you feel about the statement: Overall, [company] made it easy for me to handle my issue? Do you: disagree, somewhat disagree, neither agree or disagree, somewhat agree, or agree?**
Q •	How can we improve (product/service)?
Q •	Is there anything else you'd like to share? <b>TIP:</b> This question works surprisingly well at the end of each survey!

\*Calculate as Net Promoter Score®

\*\*Customer Effort Score

# Question Set 3.

## 60dB Meaningfulness Toolkit

Use this question set to understand:

- > Depth of impact
- > Usage
- > Value proposition
- > Customer satisfaction
- > Meaningfulness

**Q .**

When do you use your [product/service]?

- Everyday
- 3-4 times a week
- 1-2 times a week
- Less than once a week
- It's not working

**Q .**

There have been changes in my home because of (product/service):

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree

**Q .**

Were these changes positive or negative?

- Positive
  - Please explain the positive changes in your life because of (product/service)
  - Out of those changes, which one is most important to you?
- Negative
  - Please explain your answer

**Q .**

On a scale of 0-10, how likely is it that you would recommend the [company] (product/service) to a friend, where 0 is not at all likely and 10 is extremely likely?\*

**Q .**

Can you please explain your score?

\*Calculate as Net Promoter Score®

# Question Set 4.

## Poverty Profile

### About this tool:

We use the Poverty Probability Index (PPI®) managed by Innovations for Poverty Action to understand the percentage of customers living below poverty line. The PPI is statistically-sound, yet simple to use: the answers to 10 questions about a household's characteristics and asset ownership are scored to compute the likelihood that the household is living below the poverty line. With the PPI, organizations can identify the clients, customers, or employees who are most likely to be poor, integrating objective poverty data into their assessments and strategic decision-making.



How to get started:

<b>Step 1</b>	Go to: <a href="http://www.progressoutofpoverty.org/">http://www.progressoutofpoverty.org/</a>
<b>Step 2</b>	Create a free account
<b>Step 3</b>	Click on “Find your PPI” and select your country of interest
<b>Step 4</b>	Download the country specific “PPI Scorecard and Lookup Table”
<b>Step 5</b>	Follow the instructions to conduct the PPI survey questionnaire. Aim for a minimum sample of 200 respondents
<b>Step 6</b>	Once you have the data, budget 30-60 minutes to complete the analysis using the scorecard and lookup tables to calculate the probability of customers living below different poverty lines.

# Question Set 5.

## Customer Archetype

Use this question set to understand:

- > Attitudes, behaviors, and preferences of your customers (and non-customers) when marketing a product/service
- > How to build and understand your customers along attitudinal lines vs. simple demographics

Q •

What did you buy in the last year that has had a big impact on your life?

Q •

What is something you hope to own in the next 5 years?

Q •

How likely are you to purchase a new product before any of your friends own it?

- Very likely
- Likely
- Neutral
- Unlikely
- Very unlikely

### Tip

Don't forget about surveying non-customers! You can glean important insights on how to better market your product to meet their needs.

# 60 \_\_ decibels

## About 60 Decibels

We're a tech-enabled impact measurement company, best known for our Lean Data<sup>SM</sup> approach spun out from Acumen in 2019. We've pioneered the use of (mostly) phone-based surveys to measure social impact across the world. Our targeted, repeatable approach to gathering customer insights and social impact data has been used by more than 300 of the world's leading impact investors, companies, foundations, corporations, NGOs, and public sector organizations. If you want to geek out on our methods, including our history, (and there's a little geek in all of us) please visit [60decibels.com](http://60decibels.com).

## Get In Touch

- > Follow us on Twitter [@60\\_decibels](#)
- > Sign up for [The Volume](#), our monthly collection of things worth reading.
- > For other inquiries, please contact:  
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