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Standard Operating Procedures

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High Level Process Flow

- **New project email:** SKP shares RFP (if available) or heads up to SK.Programming@Insient.com informing them of a new project. A project code is assigned.

Commented [EV1]: Believe this is the preference

- **Team looped in & kick off call set:** Project team is looped in with SK.Programming@Insient.com with the intent to setup a kickoff call.
    - MR COE informs teams Insient needs 12-24 hours prior to the call to review their work-in-progress questionnaire
    - If teams do not provide this to you with sufficient time, you can request to setup another time to speak once you've had a chance to review.
    - If teams provide a document that's clearly missing a lot of content, you can request to push the call to a later date once the survey is more final.

- **Change management process:** Once programming begins, MR COE team will share change management process and link to Google sheet feedback log.
    - If MR COE doesn't provide a feedback log link by the time you start programming, you may set one up (make sure everyone on the thread can view & edit).

- **Timings:** After you've had a chance to review the survey document, share ETA for test link delivery by sections. Try to be as accurate as possible. Keep in mind when the team wants to get in field and work backwards to see if you can make it happen.
    - ***Don't under-promise*** – teams will often push back and ask why it takes so long
    - ***Don't overpromise*** – at earliest sign of delay, mention to team and explain why
    - ***Prioritize delivery, even if partial*** – teams would rather get a couple sections sooner for testing vs. waiting until all sections are ready

- **Programmer clarifications:** Programmers input questions/suggestions/assumptions etc. into feedback log. You might need to remind teams to answer them in as close to real time as possible. Re-paste the feedback log in the email for ease of reference.
    - If more efficient, suggest a brief call to discuss more complex issues (e.g. rendering, unclear logic)
    - If programmer thinks the logic (Termination logic, Base logic or quota logic) should be other than the one mentioned on the guide, programmers need to clarify the already written logic on the survey guide with SK team and should **not** update the logic without getting the confirmation from the client.

- **Test link delivery & access rights:** Deliver both client list and panel links to teams along with sections they can test. Remind them these won't change until we go live. Give all SKP email addresses access rights before you share the test link.

- **Managing multiple questionnaire versions and feedback log input:** SKP project team will likely share updates to sections you've already programmed. It is fine for you to finish the sections you are working on before passing changes on the updated version (just let them know this is your intent) or the feedback log. Just be clear about the order you will be processing updates and provide ETAs for turnaround when possible (e.g. V2 changes ready by 12 pm EST, then will address feedback log, then V3 changes). Follow team preferences for prioritizing sections/questions for updates.

- **Client list setup:** Discuss needs for client list setup (unique versus generic; if unique will client pipe in IDs or any other variables or do we deliver pre-defined links). If generic, ensure team includes email question for reentry (flag if not included).

- **Connect Insient with vendors:** MR COE loops vendors in with Insient for redirect implementation (please share link structure before you go live to avoid having to wait to set the survey live and then test). Confirm which vendor contacts need portal access. If multi-sourcing, do not grant data download rights.

- **Quotas:** Both programmers and SKP review and sign off on quotas before the survey goes live. Ensure proper implementation of hard vs. soft quotas (teams typically include N sizes for soft quotas for reference, but these should not be programmed as hard caps)

- **End pages:** Check before going live – does the client list have the right end page?

- **"Going live" process:** Explain the "going live" process to teams – will take 1 to 1.5 hours to set the survey to live and you will let the vendors know when they can start sending sample. All test data will be cleared out (i.e. quota counts, terminates, completes, etc.)
    - Project teams may not be aware of the go-live process and may instruct vendors to launch prior to the survey being live once they give final sign-off. If this happens inform vendors to refrain from launching until you are ready.

- **Data checks:** Inform team when they can expect results of data checks. Prior to SL, discuss with team what N size is needed to start data checks; initiate DV checks once this target is achieved (without specifically asking the team for approval to start).

Commented [VG2]: In general we will give data download access, unless the study is a DD (due diligence). Please let us know if we need to change it.

Commented [LP3R2]: I think anytime we multisource we should restrict download access.

Commented [VG4]: In general in quota table we will see if the quota is a soft quota or hard quota. If we can maintain it for all studies, we will not keep quota counts for soft quotas, even though if quota counts given in questionnaire.

Commented [LP5R4]: Agree

Commented [VG6]: Usually we will keep standard end pages for client list sample, if we receive any separate texts in the questionnaire we will use them accordingly.

Commented [LP7R6]: Agreed - trying to avoid the situation where one client saw another client's end page (basically don't copy / reuse scripts)

MR COE Review

- All surveys should have gone through MR COE review before programming begins.
- If you see a lot of unnecessary tables and blue highlighting on Life Science projects, it has not gone through our review and Insient should flag for us.

Mobile Compatibility

- Mobile compatibility should be the **default setting**. We always try to make our surveys mobile compatible unless a team specifically says otherwise.
- **Do not turn off mobile unless confirmed by the team** (preventing mobile devices negatively impacts vendor feasibility).

  Exceptions: Surveys do not need to be mobile-friendly if CATI is the only source since they will use screen share. Some LS teams will require mobile be turned off due to large stimuli that needs to be shown on a bigger screen.
- Do not apply the setup to have the respondent rotate their mobiles to review any screen unless we get exclusive confirmation from clients, we have observed major drop offs at screens when asked to rotate.
- If mobiles are disallowed from taking the survey and are allowed to take survey only on tablets and above, kindly use the below text to redirect the respondent, when they login to take the survey on mobile.
  - This survey is only available to complete on tablets, laptops or desktop computers. Please use the same link to re-access the survey on one of these available device types.

Formatted

Live Link Setup and Sourcing

- **Panel:** Enable Research Defender
  - Turn on advanced detection (Forsta) on all projects.
  - Research Defender: Add termination for 100 dupe score. Add scripts to avoid termination for re-invites + any refinements needed for clear reporting/ panel testing.
- **CATI:** Remove IP blockers for that source only
  - **Note:** Some vendors will require you to setup two sources – one for online sample and the other for CATI.
  - **Example vendors:**
    - GRG Health is 100% CATI
    - GLG typically requires both Panel and CATI setups
    - RepData typically uses Panel for Consumer work and CATI for B2B
    - IDR uses a phone-to-web methodology; IP blockers should be removed for them.
- **Client list:** Discuss client sophistication in sending unique links versus generic links. Explain the pros and cons.
  - **Unique link setup:** Does the client want to dynamically pipe in any variables in the entry link? Or do they want us to just send them batches of unique links?

- **Typical generic link setup:**

  In order to begin the survey, please enter a valid email address in the text box below. This is to allow you to stop and restart the survey where you left off if you need to do so. It will not be used in any other way.

  After entering your email address, please click "Continue" below to begin the survey (or to pick up where you left off).

  Email address: [---------------]

Access Rights:

- **MR COE Team:** Universal access (give at start of project)
- **SKP Consultants:** Make sure all SKP email addresses on thread have access to Forsta **at the time of test link delivery.**
  - If their logins appear deactivated, reach out to Forsta to re-set
  - If they never had a login, instruct them to activate their account within 24 hours or their login will need to be reset again.
  - **Permissions:**
    - Survey: View
    - Reporting/Crosstabs: Edit
    - Data: Download
    - Response Summary: Edit
- **Sole vendor:**
  - All vendor emails on thread should have access to Forsta **before we go live.**
  - **Permissions:**
    - Survey: View
    - Reporting/Crosstabs: Edit
    - Data: Download
    - Response Summary: View
- **Multiple vendors:**
  - All vendor emails on thread should have access to Forsta **before we go live.**
  - **Permissions:**
    - Survey: View
    - Reporting/Crosstabs: Edit
    - Data: None
    - Response Summary: View
- **Note: If vendors ask us to send them reports, kindly remind them they have real-time access to the reportal to monitor themselves. Re-share dashboard link as needed.**

Multi-Country Survey Lookouts

- **Currency symbols:** Should pipe in respective currency symbol in each pricing question. If the team did not provide them, please ask them to.
- **Currency conversion:** Hidden questions should be created with USD conversions as analysis typically is in USD.
- **Use of decimal versus comma in pricing questions:** Always program in commas for GBP and EUR and decimals for non-EU markets.
    - **Euro:** 3,5 Euro
    - **USD:** 3.5 USD
- **Languages:** If team uses translations, suggest to add a language question as the first question and let that drive language (rather than link).

Quotas

- Require teams to sign off on quotas before the survey goes live (i.e. what quotas are included, are they defined correctly, which are hard vs. soft).
- Always cross each quota by source (client list versus panel).
- Hard quotas typically only apply to panel. If you see hard quotas on client list, flag for consultants so they understand they would be turning customers away once the limit has been achieved.
- Client list usually means Customers and Panel typically means Prospects. Sometimes Churned will be captured via Client List and other times Panel. **This can change during field if the client list does not perform as expected,** which is why we always keep source and customer status defined separately.
- Flag if teams assume **Source = Customer Type** (i.e. Source = Prospect rather than Source = Panel and Customer Type = Prospect)
- Help teams review these quotas to ensure correct setup
    - If a team asks you to increase country quotas, will the total cap allow it?
    - If we want to open up panel to customers, do we need to lift any quotas on a source x customer type variable?
- Click-balanced/census rep sample:
    - Never impose hard quota caps for a click-balanced / census rep sample.
    - Ensure all demographic variables being balanced are the first questions in the survey (call this out to teams if not done).

Commented [VG8]: If we have click balancing, please make sure keep Gender, region, Ethnicity questions in the screener it self. These questions should not be in the demographics.

Commented [LP9R8]: Agreed. We typically catch this but if we don't, please feel free to suggest.

Soft Launch:

- **Soft launch caps:** If teams ask you to input a quota cap for soft launch you may tell them:

  We generally recommend against setting soft launch caps. Forsta has quota functionality that projects how many people that are in progress would qualify for a quota. If that number exceeds the quota cap, it *will turn them away as a quota full. [if B2B sample] With B2B sample, this means we are possibly turning away people who would otherwise qualify. While we can re-invite them, there is no guarantee they will come back to our survey. Therefore, we encourage teams to be proactive in monitoring each vendor's progress and keeping vendors informed of current quota needs.*

Links

- **Consultants do not understand the difference between all the link types they ask for. They do not understand:**
  - Test links don't change after every round of edits have been incorporated. You may need to explicitly remind them of the test links (client and panel).
  - The test link changes once the survey is live; we should remind them of this and point them to the right link if they want to continue testing while the survey is live.
  - That if there is a component programmed outside of Forsta (usually ACBC or shelf set) this data sits in Sawtooth. If we clone a link for them, whoever programmed in Sawtooth would need to do the same and re-stitch the survey together OR inform the team of this limitation

Commented [VG10]: If we receive live changes, with the **temp-edit link** respondents cannot redirect from sawtooth to decipher, we should inform this to client.

- Encourage the team to login to Decipher to make use of testing tools; they can also access test links by navigating to "Preview" → "Test Survey" → Picking the respective source.

- Programmers should **probe to understand the intent behind their ask** rather than just giving them what they ask for. This is the guidance we give teams:
  - **Test link:** Used for testing before launching the survey. This is a single base URL typically differentiated by source (e.g., panel vs. client list) using a "list=[X]" element. Insient provides the test link(s) once sections are ready for testing; that URL will remain the same link to use for testing until the survey goes live. If Insient is making structure or logic changes simultaneously while the client testing, the client may encounter minor issues (like error screens). You should either set expectations or have the client avoid testing while structure/logic changes are being incorporated (wording changes are fine).
    - **When to use:** At any point prior to soft launch / live setting

  - **Live test link:** Used for testing after the survey is live. This new URL connects to a temporary environment where your responses aren't recorded. If you were to use the test link from #1 after the survey is live, your responses might accidentally be registered as real data.
    - **When to use:** After soft launch/live setting

  - **Unique links / live links:** Some teams prefer to have the client use actual survey links after the survey is live to avoid potential testing issues. It's not our preference (it's easier to use the test link from #2) but can be useful in certain situations—for example, if you want the client to validate changes you've made between soft launch & full launch. Insient can provide however many unique links you need. Important notes: the links will not be functional until the survey is live, and make sure you keep track of the links/respondent IDs so Insient can clear out the test responses.

- **When to use:** After soft launch / live setting

Personally Identifiable Information:

- **Storing email address:** If email address is being captured in the survey it should be stored in a separate project from the main project so the two are not linked (i.e. a PII wrapper)

Data Downloads/Dummy Data

- **Dummy data:** If teams ask for dummy data, ask them why – they typically want it to set up their analysis template (and usually they shouldn't do this). Inform the team you can send them the dummy data but if there are any further changes passed before the survey goes lives or in between soft and full launch, the data structure will change and they will need to update their analyses.
- **New variables:** All new variables are added to the end of the data structure after the soft launch.
- **Downloading other statuses:** teams do not understand that Forsta defaults to downloading completes. Please send them the documentation that explains how they can export different statuses if they don't know how to do this.

EasyRecon

If teams ask you to restatus IDs for quality, do one of two things:
- Point them to the MR COE team lead on the project so we can walk them through Easy Recon.
- Use Easy Recon to re-status IDs instead of doing so in Forsta – this allows teams to easily export all IDs, their statuses, and removal reasons with a click of a button.

Fielding Close

Consultants don't always understand how to officially "shut down" a survey.
- If consultants email the sample vendor(s) asking them to close the survey, please add a hard quota cap for the source(s) ASAP.
- If there is a client list, please also confirm with the consultants whether to shut down the survey entirely or keep it open for the client list.

Sector-specific watchouts:

- **Life Science-Specific:**
  - Surveys do not need to be mobile-friendly if CATI is the only source since they will use screen share
  - **Pre-tests:**
    - Always confirm if pre-tests will happen during kick off call.
    - Provide teams with unique links for pretests. This will help avoid confusion, as most consultants don't realize they need to manually input an ID into the "$id" field in the base link.
    - Insient can decide whether to split the pretest & main survey into 2 different project IDs (based on volume of changes).

- **Consumer-Specific:**
  - Always ask for brand logos and show brand funnel as a carousel
  - Zipcode (stores, schools, etc): Request store master list, with longitude and latitude if possible. Ask for radius in which they would like to sample. Dedupe any zips if there is overlap.
  - Pricing ($) GGs should always start at the highest price point and move down to the lowest.

- **B2B-Specific:**
  - Pricing ($) GGs typically should use the mid-out approach since their sample sizes are smaller.

SKP-Specific Question Types

Comstrat

- **Picking logic:** Standard ladder logic (Currently use > Previously used > Considerer). "Not Aware" is not included in the Comstrat because they would not have sufficient knowledge to evaluate. Confirm with teams if "Aware" should be used in picking logic. If client brand qualified for any of the above, always include this in picking).

- **Price scale and hover overs:** Price attribute should have different scale and hover overs. You can suggest showing a separate question for price for clarity (note this does impact the datamap for Comstrat tool). Here is what we tell consultants as a rule of thumb:

Note: Make sure your scales are moving in the same direction for price and non-price attributes to prevent respondents from having to flip back and forth – if you don't, this can lead to data quality issues/inconsistencies!

Options you can use together:

Use this…. Please use a scale of**:**	**With this….** Please note that for **price**, the scale means:
1 – **Much worse** than competitors in the market 4 – **On par** with the average competitor in the market 7 – **Much better** than the rest of the competitors in the market	1 – **Very expensive** compared to competitors in the market 4 – **On par** with the average price in the market 7 – **Very inexpensive** compared to competitors in the market
1 – **Significantly below par** compared to other providers 4 – **On par** compared to other providers 7 – **Significantly above par** compared to other providers	1 – **Significantly lower price** relative to other options 4 – **On par** with the average price of other options 7 – **Significantly higher price** relative to other options

Commented [VG11]: In some questionnaires, there will be a note indicating whether the "Other (please specify)" option should be included. However, some questionnaires may not have this note. As a standard practice, please confirm whether we need to include this option or not.

Commented [LP12R11]: Usually not, but please ask/confirm with the team.

Commented [VG13]: Based on Prasad's suggestion, we plan to divide the ComStrat questions into two separate questions: one for Non-Price and one for Price. This approach aims to ensure more accurate data from respondents. Please confirm if we can follow this as a standard.

Commented [LP14R13]: We can do this, but that poses difficulty for Comstrat analysis. Your team would have to create a datamap for the team that renames the price question variable to be consistent with the other value drivers.

Van Westendorp

- Confirm the range to be shown
- Confirm the currency to be shown
- Confirm the number of decimals to be shown
- For GBP and EUR, implement comma setup (see above under Multi-Country Survey Lookouts)
- Confirm metric if not clear – per month / per year / per user
- Always show one row at a time, greying out previous responses so respondents can't change their answers.
- Confirm whether the following rows need to be > or >= the previous row.
- Standard validation logic: "Please ensure your [acceptable/expensive] price is [greater than/greater than or equal to your [expensive/prohibitively expense] price
- If VW is a percentage exercise with an upper range of 100%, automatically end the exercise if the respondent enters 100%, otherwise they won't be able to proceed.

Gabor Granger

- **Typical Setup (used in most NA Surveys):**
    - 5 price points (usually % intervals)
    - 5 response options:
        - Definitely would not purchase
        - Unlikely to purchase
        - About 50/50 chance of purchase
        - Likely to purchase
        - Definitely would purchase
- **Alternative setup (most common for LS or EU projects):**
    - 5 or more price points
    - 2 response options (yes or no)
- **Consumer:** Pricing ($) GGs should always start at the highest price point and move down to the lowest.
- **B2B-Specific:**
    - Pricing ($) GGs typically should use the mid-out approach since their sample sizes are smaller.
- **Price ($) versus discount (%):** Price and discount works in opposite way, The more the discount the lower the price, hence more attractive and the lower the discount, the higher the price and therefore less attractive.
- Confirm the currency to be shown
- Autofill options in dataset so there is a variable for every price point, regardless of what was shown.

Commented [AS15]: Some Consultants do not want to hide the non applicable options, and show all 5 options on all screens, how to go about in those situations?

Commented [LP16R15]: Should be very rare circumstances. Explain why we advise against it and if they still want to do this, that's fine but let them know it can result in logical inconsistencies.

Conjoint

- **ACBC:** If any survey questions pipe in the conjoint winning concept, skip those questions if respondent doesn't have a winning concept.
- **CBC:**
  - Flag if teams do not include a "none" option (as it probably should be included)
  - A "0" in the design file indicates an **alternative specific** (i.e. some kind of fixed text) - clarify with the team if unsure what text to display
- **UI Layout specs:** ask teams to provide a mockup of how they would like the conjoint to render visually.
- In cases where the conjoint (ACBC, CBC, Shelf Set) does not neatly fit vertically, incorporate code that asks respondents to rotate their phone horizontally.

Shopping Cart

- Prompt the team if you don't see any randomization logic, as usually at least some screens or blocks should be randomized and/or rotated.
- Confirm if Insient should program images or HMTL
  - If images, ask team to create mobile-optimized versions.
  - If HTML, communicate that is custom script and can reach out to MR COE for pricing.