

market research

Predictive Dialing in Market Research



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What is Predictive Dialing?

A Quick Reminder:

The main function of a good dialer is to increase the number of live calls/interviews that an interviewer can handle in a given time. It does this by increasing the dialing rate beyond just one trunk per waiting interviewer. Then it will aim to dispose of non-live calls, so that they are not passed to interviewers; for example, busies and no answers. In the cases of machines, faxes and modems will normally get excluded. Optionally, most answering machines may also get excluded.

Is a Different Dialer Design Required for Market Research?

Well let's start by dismissing the idea that market research needs a special kind of dialer design. It simply isn't true. Let's add some emphasis to this – it totally isn't true.

Just as in other outbound markets, there is a widely held view in market research that the right predictive solution for market research is an algorithmic one based on specific behaviour of interviewers in market research. An algorithmic approach (based around mathematical formula) is wrong for all outbound activity. The only way to achieve reasonable predictive performance and avoid unacceptable nuisance calls is to adopt the simulation approach taken by Sytel.

Some readers brought up with other dialers in market research may not necessarily agree with this. A debate on the merits of specific dialers is beyond the scope of this paper, but we are very keen that anyone reading this document should set aside any bad dialing design ideas they may have picked up. So if you think that market research needs a different approach and the material we provide doesn't convince you otherwise, then email or phone us so we can set matters right for you.

So How Should Dialers be Used in Market Research?

(i) No Predictive benefit

As a general rule predictive dialers just do less in market research because of the nature of market research campaigns. For example, low numbers of interviewers, high interview times and good lists that yield up high numbers of people willing to be interviewed mean that predictive dialers will offer very little benefit over progressive dialing (one trunk per interviewer). Sometimes it is suggested that a way around this is to dial ahead for interviewers as they are finishing calls. But this is just a bad idea. Even in market research, it is impossible to tell with any accuracy when an interviewer will finish a call. In the bad old days it didn't matter because if someone answered the phone, ahead of interviewer availability, then you put him into a hold queue, hoping he wouldn't hang up. This kind of practice has largely died out as compliance systems have been introduced.

(ii) Predictive Benefit

But there is an important area in market research where a well-designed predictive dialer can really deliver significant benefits, and it is as follows

- Short interview times
- Cold calling lists or random digit dialing

Even with low numbers of interviewers, say under 10, predictive dialing can yield significant benefits, without the dialer causing lots of nuisance calls, for example by abandoning lots of live calls or placing them in hold queues. And as interviewer numbers grow on a campaign to say 20-30, then the predictive benefit with Sytel can be as much as 50%, or in other words an increase in talk time per interviewer hour from say 30 minutes to 45 minutes.

And such campaigns are of course very similar to other outbound segments such as telemarketing, where the benefits of predictive dialing are well known.

But in order to realise these benefits, interviewer behaviour needs to be carefully managed. Historically in market research, interviewers have sometimes been released from a campaign at the end of any call, at their choosing.

Even when this is not the case and good management controls are in place, in order to get best performance and to control nuisance calls the dialer, rather than the interviewer, should manage how an interviewer is released. This is what we call Agent Negotiation, where the interviewer asks to be freed and the dialer then decides when this should happen.

There are three cases to consider when an interviewer requests to be freed

Interviewer state when release request made	Dialer response
Talking	Better than evens chance that the dialer will release interviewer at end of this call
Wrapping	Uncertain
Waiting	Dialer almost certain to ask interviewer to take one more call

Sytel is supporting some tens of thousands of agents around the world, very happily working in this way, and getting solid predictive benefit as a result. We expect that the implementation of Agent Negotiation in market research to be straight forward and show significant benefits in terms of additional talk time per agent hour.



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