QUIRK'S
M E D I A

How not to lose a client

A senior manager of field operations outlines the steps necessary for a productive working relationship among field partners.

Help us help you

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Do you struggle to find high-quality field partners for your market research studies? So do I. I manage field operations for a custom, primary market research company serving consumer and business markets. We work in many industries around the world so I need to work with many field partners. I believe they all try to help but they need our help too. They need to understand our expectations, or at least where they're falling short, as well as how they can improve and what this would mean for developing more effective, long-term relationships.

Working as a fieldwork manager, it's my job to help create a culture in the market research industry that allows us to be real partners and breaks down barriers so that we can collect the very best data. To start us on that path, here is quick guide for what partners, vendors and suppliers should do to avoid losing us.

Correctly estimate feasibility. Determining feasibility is in many ways an art. It is done best with access to numbers and an understanding of your panel members' response rates and the subject matter itself. On certain projects, feasibility determines if we win the project or if it will even be commissioned at all. The partner of ours with the right feasibility will win the project. There have been projects where the panel told us we could get n=400 but the sample ran out when we reached n=200, even though specs didn't change. Our client had already paid for all the upfront work but now doesn't have enough data to do their full analyses. This creates a difficult situation that damages our client's trust in us and we may have to take a hit to give

them some money back. It's imperative to communicate concerns about feasibility as soon as possible so we can mitigate the damage. There have also been projects when I needed to get n=400 to make it happen and was told feasibility was only n=300. Fortunately, our client decided to take the risk and go into field anyway and ended up obtaining all n=400. Had they not been willing to take that risk, we could have lost the project, not because it couldn't be done, but simply because someone miscalculated.

Check your work. Very often I receive recruiting grids with obvious errors on them. Everyone makes mistakes, but here I am referring to issues that could be caught with a 5-10-minute review of the work. Usually my assigned project manager says they'll speak to the recruiter about it but I am left wondering why they didn't do a quick check of the work to catch it before it ever hit my desk. We're all busy but this sends the message that I am not even worth a few minutes of their time for a data check – or that they already have enough more important business.

Address concerns about data quality. Unfortunately, when working with general-population surveys (B2B as well, sometimes, but less common), some people try to scam the system. There are also bots trying to get into our surveys. Suppliers cannot completely prevent these but they can catch many of them and for the ones they cannot, it's how suppliers react to these situations that is important. When suppliers are unwilling or unable to address these and other quality issues, that's when there's a real problem. I've worked with companies who can't figure out why things such as IDs aren't matching on their end and ours. Others can't explain why there are so many poor-quality respondents coming in. (Whenever over 5 percent of the data is scrubbed, red flags are raised and we investigate.) Having a deep understanding of the panel and the ability to troubleshoot is vital. Additionally, suppliers must take ownership of any mistakes. This tells me that the person making the mistake understands the issue and that it shouldn't have happened. It also gives me confidence that it won't happen again.

Be transparent. Sometimes, field partners don't respond to my questions because they have trouble understanding or investigating the issue. This happens. Sometimes we're guilty of not being as clear as we think we are or want to be but suppliers must communicate this, rather than ignoring and not answering my questions. Other times, suppliers answer, but they try to hide something. I jump to the "hide something" conclusion frequently because it happens so often. When I don't get answers, it is my job to dig and find them. Sometimes it's as simple as a particular partner sending respondents who are providing low-quality data. By not revealing all the partners, I blame it on the company leading the project rather than placing the blame where it belongs, on a panel that I never even reached out to or worked with (likely because I was already aware of their poor-quality respondents). Some partners have flat-out lied to me about where sample was sourced from, how many calls were made, or hours were put on the project, or how the project was set up. This takes away my ability to properly manage the project and, more importantly, it takes away trust. There are plenty of partners that I can never work with again because they said they were only using their main

panel and I come to find out they were leveraging partners. If they had told me this up front, it might've been just fine. However, when they lie to me, I am effectively lying to my clients and I just can't have that. I also then wonder what else I have been misled about and have a hard time trusting any of the data.

Set realistic expectations. To set up a great relationship, it's important to have both sides set clear expectations. When I start working with a new partner, I share stories about my team and what makes them happy or frustrated. My partners are usually grateful but also surprised since they don't usually get this. I walk them through what a typical project is like, even if it seems obvious, so they understand how we operate and why we ask the questions we do. Finally, I give very specific examples of expectations; for example, to us, "quick turnaround" is 20 minutes. I don't like to use terms such ASAP (at least not without an explanation) because that means something different to everyone.

Follow through on your commitments. Each day we work on a project together, we are making commitments to each other, whether it's that we'll reach a certain sample size, we'll pay a certain price or we'll be available for a call. Many times a project or account manager says they'll get back to me tomorrow morning but they don't and I have to follow up. Or we schedule a call and they don't show so we reschedule. While these may seem like minor inconveniences, they add up. Missing a call can create an extra 15-20 minutes of work once everything is communicated and reorganized. Chasing an e-mail puts more things to remember on my plate and takes away from other tasks. It also damages my trust that they'll do what they say they will and get the work done.

Not completing the project is an even bigger missed commitment but it does happen. Sometimes it's just a matter of the schedule slipping and this needs to be discussed with us, so we can prepare the client, but some partners don't even acknowledge this. Other times partners take on a project and after a week or so only put in a handful of hours. They clearly don't have the bandwidth for my project and instead of telling me (being transparent and setting expectations), they avoid it and don't meet their commitments, leading me to fall short on mine. At the end of the day, I need to trust someone is going to do what they say they will so that I can focus on my job.

Respond in a timely manner. My deadlines are often tight to turn around costs for proposals. The best way to ensure you're one of the sole or few competitors on a bid is to respond in less than an hour with an idea of whether you can take it on or not. My best account managers respond in less than 20 minutes, sometimes with full costs and feasibility assessments. Whenever it takes over 12 hours to receive any type of response, I, and others I have talked with on this subject, get the impression that you don't even care about the project and since someone else does, that's who we'll give the work to. I've had times where I've awarded projects to companies before their competitors even responded to the original bid. That's how fast things can move.

Main pillars

There are many more ways to ensure a great partner-client relationship but accuracy, transparency and great communication are three main pillars to ensure success. Above all, be sure to understand your client or your partner and their needs and then work to meet them.

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