A brief guide to...

# Piloting

**Sarah Thorp**
Research Director

# Hindsight is a wonderful thing, but wouldn't it be great it if wasn't?

Wouldn't it be nice if we could see potential pitfalls and do something to try and avoid them? Imagine spending a decent amount of time, effort and budget on something and then thinking "I wish we'd asked..."

Enter, the pilot phase.

# Measure twice, cut once

At Vanson Bourne, our approach — as standard — includes a pilot. In a nutshell, we launch the survey to a small number of English-speaking respondents from our own CommunITy; usually about 10-20 individuals who meet the requirements of the research scope. We do this phase before we've had the survey translated, and before we've set everything up for the main fieldwork phase. We run the pilot fieldwork, create a report that we then discuss on a call with you, along with our recommendations for any edits.

The desired outcome of the stage is to ensure that the data collection tool (usually a questionnaire) is working as we would expect, and this is three-fold.

## Three considerations in the piloting stage

| 1 | 2 | 3 |
|---|---|---|
| *Is it compatible?* | *How was it for you?* | *Is it hitting objectives?* |

VansonBourne

## 1

### Is it compatible?

Firstly, the more straight-forward consideration: Is it actually compatible with the survey software? This is something that typically we, as your research partner, will handle - but it's worth you keeping this in mind as it's influenced by other areas of the research programme, in particular questionnaire design.

So, is all the code working? Is the routing working? Are respondents only seeing the relevant questions for them, based on their answers?

Is the respondent experience what we need it to be regardless of the respondents' device choice? Is it easy and clear for them to navigate? This will help ensure the better data quality and response rates.

Are the question styles appropriate for what we're trying to ask or do? If not, now is the time to refine!

## 2

### How was it for you?

Secondly, "how was it for you"? If we're not sure that the specific respondent type will know the answers to some of the nitty-gritty questions, the pilot allows us to ask them and find out.

For example, asking business respondents if they felt equipped to answer questions that might be technical in nature. Knowing if this might pose an issue when we have 10 respondents instead of 1,000 is a massive advantage! It means we can go back to drawing board and perhaps change our approach – whether it be the questions, or the actual scope of desired respondents – before hindsight kicks in.

If, between the stakeholders, we can't decide the best way to ask or pose a question – we can ask our target respondents. Our pilots are done with our own panel – we know these people and their specialisms fairly intimately. So, if we want to ask quite a complex question on cloud and we're not sure it's going to work, we can make sure we have some known cloud experts as part of the pilot and ask them what they think of the questions and if they can answer them accurately.

## 3

### *Is it hitting objectives?*

Lastly, and probably more relevant to what we're going to talk about here, is the question: Is it actually addressing the research objectives?

Something we talk a lot about at Vanson Bourne is that "best enemy of better". And sometimes the brutal, ugly truth of research is that fast-paced, unforgiving campaign timelines or stakeholder deadlines means that the pilot is even more essential.

We can't always finesse a questionnaire back and forth as many times as all the stakeholders might like, so the pilot allows us to draw a line and say "let's go with this and see what comes back", and usually, that's the best approach. It means we still have one revision of the questionnaire in the bank – but we get to do it with some actionable insight – in the form of real responses.

## Here are just a few of the things we often use pilot data for:

### Approximately how many…?
Something we do in pretty much all pilots is assess numerical answer lists. We can see if the options might need to be adjusted if the average from the pilot is skewing towards one end of the scale. For example, if our list tops out at 100+, but the average is coming out at 79, perhaps we need 100-150, 150-200 and then 200+ to get a more accurate average? Or maybe allowing respondents to free-type in the answer would be better?

### Drama or a big number?
Depending on the aim of the campaign, the focus might be on getting a particular soundbite, or it might be getting a big percentage to hook in a reader. Either way, if your desired outcome isn't being met, perhaps we need to rethink the question wording. Did we perhaps make it too dramatic in the first place?

An example might be "I have nightmares about what a cyber attack might do to my business". While a nice headline in the making, people might not agree with this as it is may be a tad extreme, so tweaking it to "I am worried about what a cyber attack might do to my business" might mean more respondents say they agree with this, and therefore provides a higher percentage to be included in that headline.

### But why?
More often that not, there will be a response that we can't explain, and nor can you… "Why are they saying xyz is an issue?", "why did three out of ten choose to specify that?" "Why is that answer coming out on top?" And this is where the pilot really comes into its own. We can write another question and ask them.

# Get it right first time

We mentioned previously that timelines for research campaigns can be tight, we all know that's the reality.

It might be really tempting to "skip" the pilot phase to save yourself a week, but that can be counter-intuitive; we could easily spend more than that saved week at the end trying to figure out why things are the way they are, or retrofitting questions into desired headlines or hypothesis that aren't as show stopping as they could have been.

So, save yourself the pain of admitting that "hindsight is a wonderful thing", and allow some time for a pilot phase.

## What are you looking to achieve? Let's talk!

If you'd like to understand more about what a pilot phase is, the pros and cons, or just about research in general then please get in touch with our team today:

**enquiries@vansonbourne.com**

# VansonBourne

Stronger insights. Smarter strategy.

vansonbourne.com