# The screening and recruitment process is ready for an overhaul

| By Ana Edelenbosch and Marcel Slavenburg

As the research industry adapts to modern decision-making processes and shortening project timelines, the art of finding the right respondent has become more complex and time-consuming. Quota requirements are tightening and looking for the needle in the haystack has become the new normal. A great deal of time is spent discussing, negotiating and finalizing screening questions and other study details. Very narrow expectations often result in high screen-out rates that lead to last-minute screener adaptations and re-contacting and/or re-inviting respondents that were initially screened out.

Imagine for a moment that you are the specialist being targeted to participate in a health care study. In spite of your busy schedule, the recruiter finally gets the chance to talk to you and administer the screener. After 10 to 15 minutes, sometimes even longer, the recruiter realizes that you do not match the screener because you might see just a few patients less than required or because you prescribe just a little less than what is mentioned in the screener. The recruiter would thank you for your time and inform you that although you are the type of specialist the company is looking for, you do not fit the screener. If this situation repeats itself enough times, the market research agency will be advised to relax the screener because too few specialists are making the cut. Since most market research agencies aren't empowered to adjust screener requirements without consulting the client first, days or even weeks can be lost before a decision has been made.

*How would you feel as the respondent being screened on the phone?*

*What if you were initially rejected but then begged to return? Would you genuinely believe you were the right candidate to participate in that study and be eager to participate?*

## Recruitment profiles

While everyone is globally connected, socially networked and moving at warp speed, the recruitment process in market research has still not evolved. To keep up with these developments and meet the need for faster decision-making, we feel that recruitment is ready for an overhaul. The same technology that has compressed timelines and raised expectations for quick insights can also help researchers find better respondents in shorter time frames.

Consider the power of matching profiles. The effectiveness and efficiency of profiles is well established in areas like headhunting, dating sites and real-time matching of demand and supply. Profiles include the most important screening criteria, yet are shorter, less ambiguous and enable users to target the right respondent in more efficient ways.

When presented with a clear research objective and once the target group is agreed upon, a recruitment profile can be developed based on two or three essential criteria that the respondents must match. Once the profile is created, recruiters can match it against respondent profiles from their database or source respondent profiles via other channels including social networking sites. Recruiters are able to make a soft pre-selection, during which the target group is presented with the
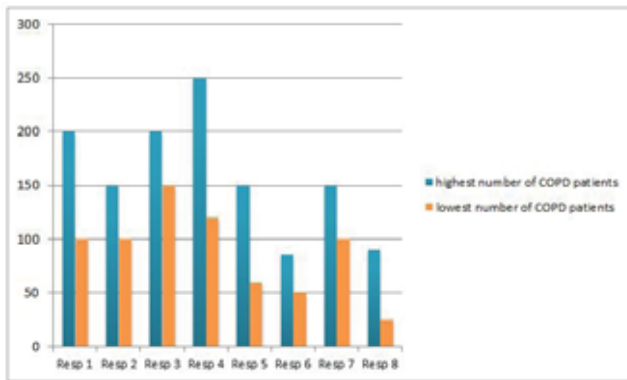
Figure 1. Average COPD patients treated in an average month

profile. If the target group self-identifies with this profile, an appointment can be scheduled immediately, an interview can be conducted or a link can be activated. Identifying and interviewing the right key opinion leader or the one patient suffering from a rare disease is easier and faster when screeners are put aside and profiles are introduced.

## Challenges and risks

As beneficial as profile recruitment can be, it's not without its challenges and risks. For example, couldn't respondents take advantage of this situation by pretending to fit the criteria? What about people signing up who do not entirely match the criteria? What about my patient numbers and other screener criteria that are potentially not met?

With these and other questions on our minds, we set out to evaluate the accuracy of respondent-provided screening information. We examined screening data from various chronic obstructive pulmonary disease (COPD) studies conducted over the past four years and identified a group of respondents who participated in 10 of those studies. An analysis of their screening responses shows inconsistencies in the number of COPD

patients they claimed to have seen in an average month (Figure 1). This sample leads one to question the value of the screening information, as well as their impact on study analysis and recommendations.

We have a strong feeling that this is only the tip of the iceberg. Considering the future need for faster insights, we wonder whether searching for the needle in a haystack recruitment is still realistic and effective. Nevertheless, we feel it is a waste of respondents' and recruiters' time and energy to go through lengthy screeners when the quality of the information provided seems to be uncertain.

Having used profile recruitment in several projects to select patients, key opinion leaders (KOLs), payers, specialists and hospital-based pharmacists, we have found it most effective for recruiting difficult target groups. In a recent patient recruiting example, profiles were drawn up to recruit individuals who discontinued a particular drug on their own initiative. The patients were recruited via specialists and consumer recruitment agencies, both of whom could clearly identify the right patients for this research. In another instance, KOLs and payers were being recruited for a project in the orphan disease area. We provided them with a profile and they genuinely identified the right or wrong person to contact and even helped in referring us to better matching respondents.

All in all, we believe that profile recruitment should become the norm for all market research studies and target groups when the goal is to reduce the time to insights. Profiles exist, yet it is time to enhance the potential of working with profiles – utilizing the power of modern technology to connect and interact – and the knowledge of recruiters to get the right match. Ⓞ

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