

SUMMARY RECIPE FOR A 10-PERSON MANAGEMENT SURVEY

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1. PEOPLE REQUIREMENTS

Who	Role	Provenance	Days of work per week	Interaction with Interviewers
Steering Committee	<ul style="list-style-type: none"> Inspire and motivate interviewers Discuss emerging thinking 	Government, Funder or Company	0	Once a month (progress review)
Research Director	<ul style="list-style-type: none"> Set up sampling frame and questionnaire Set up infrastructure Co select supervisor and interviewers (with HR) Elaborate data as these are collected Feed back issues from data elaboration to supervisors 	Academic Researcher	4 out of 5 days full time (occasionally rest of the days). Hours depends on time-zones covered	<ul style="list-style-type: none"> Weekly meetings with all interviewers to discuss progress and potential problems Pops in casually during the week to verify quality of interviews is ok
Supervisor (1 every 4 interviewers)	<ul style="list-style-type: none"> Monitors data quality (listen in to most of interviews run) Discuss interviews with interviewers Sign off interviews valid for payment 	Recruitment – important they can be trusted, so PhD student, colleague etc.	Full Time	Constant
Interviewers	<ul style="list-style-type: none"> Run interviews 	Recruitment	Full Time	-
IT	<ul style="list-style-type: none"> Set up phones and computers Provide phone records weekly 	Internal or recruitment	<ul style="list-style-type: none"> 3 weeks before the project Availability during the project 	Rare
HR	<ul style="list-style-type: none"> Advertise positions Process and select cv's Run recruitment interviews with the Research Director Process payments (monthly) based on interviews run and valid for payment Contracts 	Internal or recruitment – important can be trusted as dealing with pay	<ul style="list-style-type: none"> 1 month full time before project starts 5 days a month during project (keep track of payments weekly) 	1 day a week

2. TIMETABLE

1 Year Before

- Find funding
- Find sponsors
- Get Government/Employers/Central Bank endorsement letters
- Prepare questionnaire and identify areas of interest
- Book space for survey team (i.e. find a suitable room)
- Book living accommodation for any interviewers coming from overseas

6 Months before

- Start recruitment
 - Place job ad in major business schools & universities
 - Start processing cv's as they arrive
- Prepare IT Infrastructure, i.e. study feasibility of:
 - Programs to collect and process data
 - Computers
 - Phones and facilities to silent monitor all interviews run
 - Availability of phone records to monitor length of interview
- Set up pay scheme and draft contracts
 - Supervisors: Flat pay
 - Interviewers: Pay per performance + bonuses. This will probably need new contracts, and possibly negotiation with local unions.

4 Months before

- Finalise recruitment
 - Interview potential supervisor and interviewers. Ideally interview 3 people per post, with 45 minute interviews. Explain the project for 10 minutes during the interview, allow Q&A for 15 minutes, and role play being a manager and getting them to interview you for 20 minutes. Send them the question in advance and prepare a role-play script for consistency across interviews. Always run interviews part in the team language (English) and part in the local language – never assume telephone fluency without testing this!
 - Make offers and process acceptance (i.e. people start pre-signing contracts)
 - Obtain work-permits and visas wherever necessary

3 Months before

- Prepare Training Week
 - Prepare material for training
 - Set up rooms and people involved in training
- Prepare on the job training and fun events for people involved
- Prepare sampling frame and potential linked data (accounts, extra info)

1 Month before

- Finalise spaces and computers
 - Test that all is working properly (computers, phones, access)

- Start training for supervisor, i.e.
 - Making calls and scheduling interviews
 - Formulating open questions
 - Survey knowledge
 - Lean Manufacturing

- Send preparatory material to interviewers (survey, lean manufacturing etc)

- Prepare case studies for training events

1 or 2 Weeks before

- Training sessions for interviewers
 - Making calls and scheduling interviews (theory)
 - Formulating open questions
 - Survey knowledge
 - Lean Manufacturing

PROJECT BEGINS

First week

- Welcome and first week reception events – ideally two small parties

 - On the job training – rotate between teaching and getting new hires to:
 - Schedule interviews
 - Run interviews
- Monitor length and quality of questioning in addition to training

Week 2

- Project kicks off at full load

End of Week 2

- Start processing the data (this to be done each week until end of project) and analyse:
 - Biases (over under score)
 - Length of interviews

- Systematic missing fields (accuracy of interview)

Week 3

- Start bi-weekly 1 on 1 catch up meetings between interviewers and research director to discuss problems/ issues. Essential for highlighting any brewing issues.
- First pay per performance payment
- First progress review with steering committee
 - Interviewers present first count of interviews and interesting facts
 - Publish number of interviews collected by each interviewer
 - Discuss emerging thinking

Week 5

- 1 day training event
- Mid-project social event.
- Calibration exercises (on the basis of data collected so far)
 - Interviewers listen in to other interviewers and discuss scores
 - Methodological meetings if problems arise

Week 6

- Methodology exercises
 - Re-interview firms (different managers within same firm)
 - Other methodological issues (TBD)

End of Week 8

- Second (and last) progress review
 - Discuss results of survey and highlights
 - Goodbye dinner
- Second (and last payment)

3. FINANCE REQUIREMENTS

Interviewers

Our experience is that a highly quality (i.e. MBA) interviewer, if well managed (one full-time supervisor per four interviews), well-trained (three full days of initial training) and equipped (PC, phone with headset and interview-software), on piece-rate-pay (i.e. \$100 per interview) can run 2 interviews per day. The same set-up but with flat rate pay (i.e. \$1000 per week) drops this to about 1.2 interviews per day. Using a medium quality interviewer (i.e. randomly selected PhD student with no prior business experience) with limited management (i.e. one supervisor per 7 people) drops this to 1 interview per day. In short obtaining interviews is tough, and much like any production function, is dependent upon good inputs.

Thus to run 1000 interviews on 1000 firms would require hiring 10 MBA students for 8 weeks (including one start-up training week). Running 2000 interviews on 1000 firms will require 20 MBAs for 8 weeks etc..

Supervision

Using piece-rate pay you need to monitor at least 80% of the interviews run. Given that most interviewers spend the majority of their time scheduling a manager can monitor 4 interviewers. The managers need to be on flat pay, and ideally should be strongly linked to the project (a co-author, PhD student of one of the organizers etc...).

Data

For every country you survey you need a sampling frame, containing firms size, industry (SIC code or similar), name and telephone number.

Other variable costs

You need a budget for equipment (phones, computers and headsets), phone-bills and entertainment. The last item is important – to keep morale high in Summer we paid for free lunch once a week, two events in the Summer and some initial party events. There was also a team spending allowance for weekly team activities. It is also advisable to purchase generous thank-you presents (i.e. a crate of wine) for IT and Telecoms groups, as these are key people for the success of the project.

Accommodation

You obviously need a large room to place the survey team in. You also need nearby team rooms for meetings and training sessions. In addition it is good to have living accommodation available at a subsidized rate – in London we provided group accommodation in LSE halls (nearby, cheap but not great quality). This is optional but important – helps to build team spirit, and is also important if interviewers run unusual shifts so want to travel to work together at strange times.