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Leveraging Technology To Improve Callback Conversion

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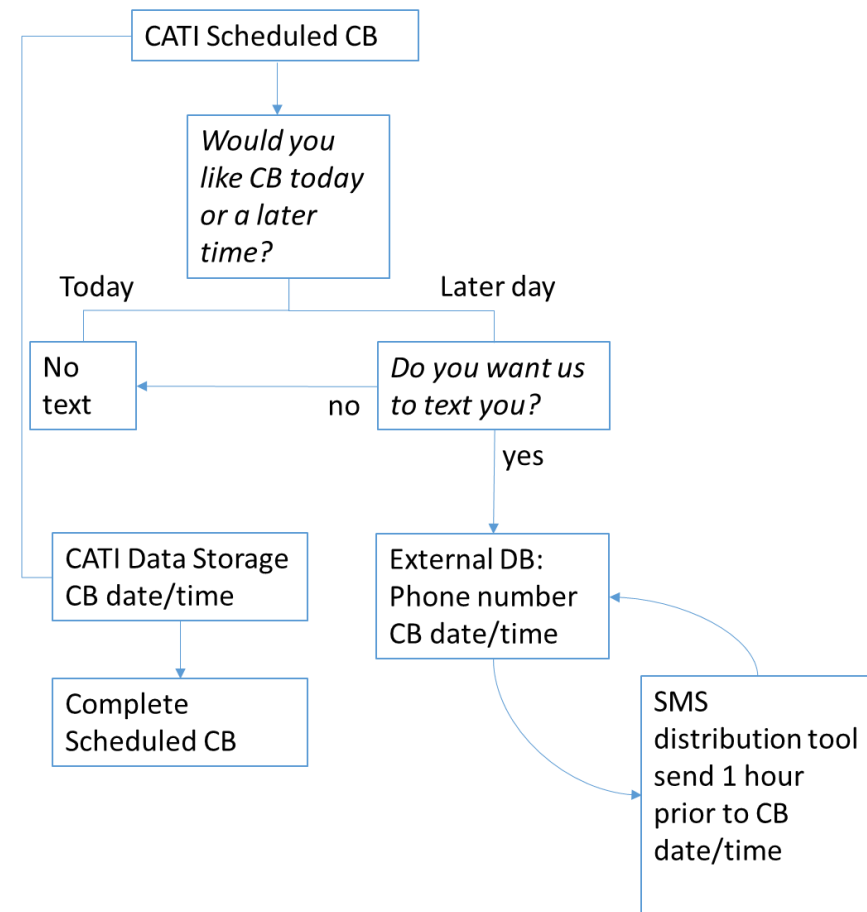
2019 FedCASIC

Overview

- Background

- Study Design

- Research Questions

- Callback Questions

- Results

- Conclusions/Limitations

- Additional Considerations

Background

- Callback appointments are a common occurrence in telephone surveys when the sampled respondent is unavailable or requests another time to participate.

- Short message service (SMS) text message reminders have shown promise in helping people meet scheduled medical appointments (Talonen, Aistrich, & Borodulin, 2014; Gurol-Urganci et al., 2013).

- Applied to survey research, SMS text appointment reminders may increase the likelihood of keeping the callback appointment and benefit response rates.

- We hypothesize that sending an appointment reminder via SMS text message augments respondent engagement, benefits overall response, and may reduce operational cost.

Study Design

- To explore this idea, we compared survey outcomes of cell phone sample records with scheduled callbacks among two groups:
  - Group 1: Records where the respondent requested a callback but declined the SMS text message reminder
  - Group 2: Records where the respondent requested a callback and accepted the SMS text message reminder

- The implementation was accomplished by integrating an API into our technical infrastructure—including our data collection platform.
  - Sample was loaded into the SMS distribution tool via an automated recurring import.
  - Automated processing script checked the scheduled callback time and released the SMS text message one hour prior to the scheduled time.

- This concept test was administered to BRFSS cell phone sample in Connecticut, Rhode Island, and Vermont during March 2019.

CATI Scheduled CB

Would you like CB today or a later time?

Today   Later day

No text

Do you want us to text you?   no

yes

CATI Data Storage CB date/time

External DB: Phone number CB date/time

Complete Scheduled CB

SMS distribution tool send 1 hour prior to CB date/time

Research Questions

1. What proportion of respondents requested text reminders for their scheduled callback?

2. What is the difference in completion rate between those that received the reminder text and those that didn't?

3. What percent completed at next attempt and by end of protocol?

   a) Post Hoc analysis – does callback punctuality impact this relationship?
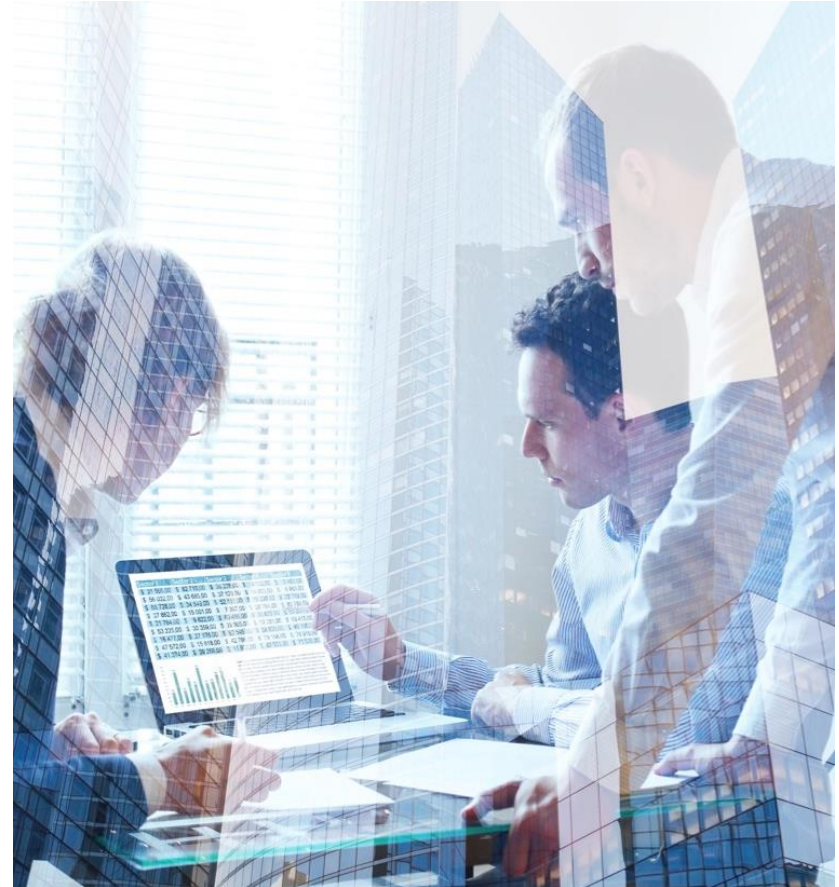
Callback Questions

When a respondent requested a callback we asked the following question(s):

Would you like to schedule a call back for today or at a later time?

1. **Today**

2. **Later time**

- If a respondent requested a callback for same day, no SMS text message was offered due to technical considerations in processing same-day requests.

- If a respondent requested a callback on a future day we asked if we could send a reminder SMS text message.

Can we send you a reminder text message with your scheduled call back date and time?

1. **Yes**

2. **No**

Results

What proportion of respondents requested text reminders for their scheduled callback?

A total of 793 respondents were asked whether they would like to be sent a reminder text prior to their scheduled callback

Text Me	Do not text me
30%	70%

What is the difference in completion rate between those that received the reminder text and those that didn't?

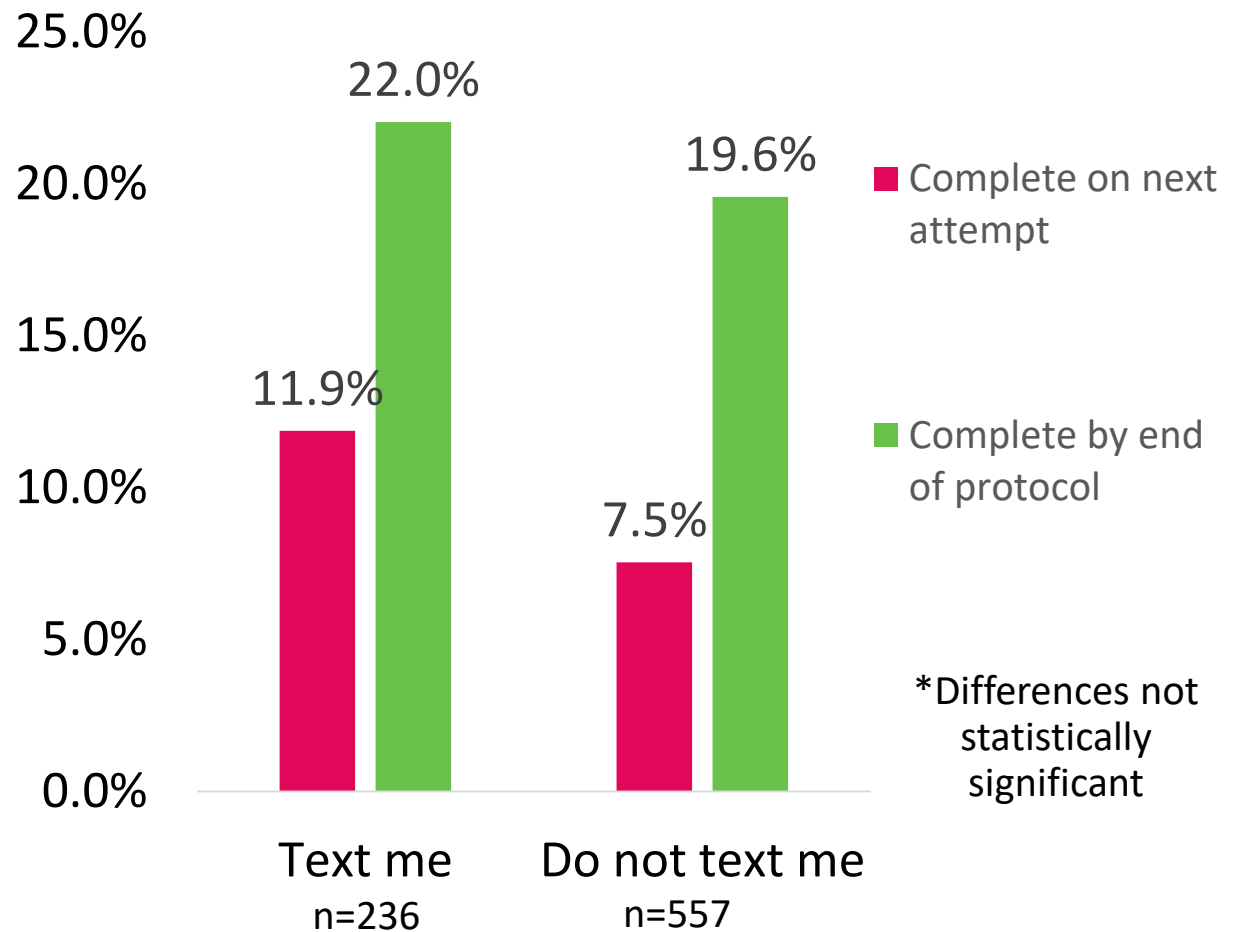| Completed	*Differences not statistically significant	Completed
30%		27%
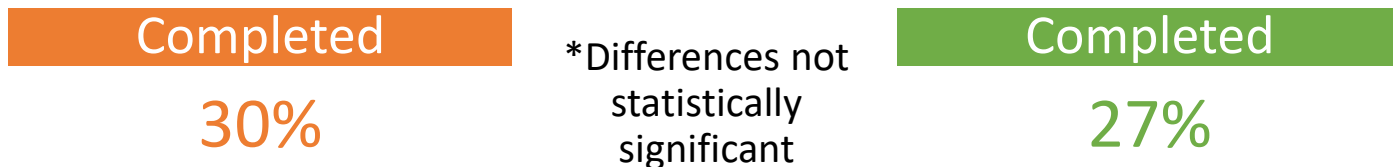
Results *

*All Callbacks (regardless of punctuality)

What percent completed at next attempt and by end of protocol?

Chart:

- Y-axis: 0.0%, 5.0%, 10.0%, 15.0%, 20.0%, 25.0%

- **Text me** n=236
  - Complete on next attempt (pink): 11.9%
  - Complete by end of protocol (green): 22.0%

- **Do not text me** n=557
  - Complete on next attempt (pink): 7.5%
  - Complete by end of protocol (green): 19.6%

Legend:
- ■ Complete on next attempt
- ■ Complete by end of protocol

*Differences not statistically significant

Results

*
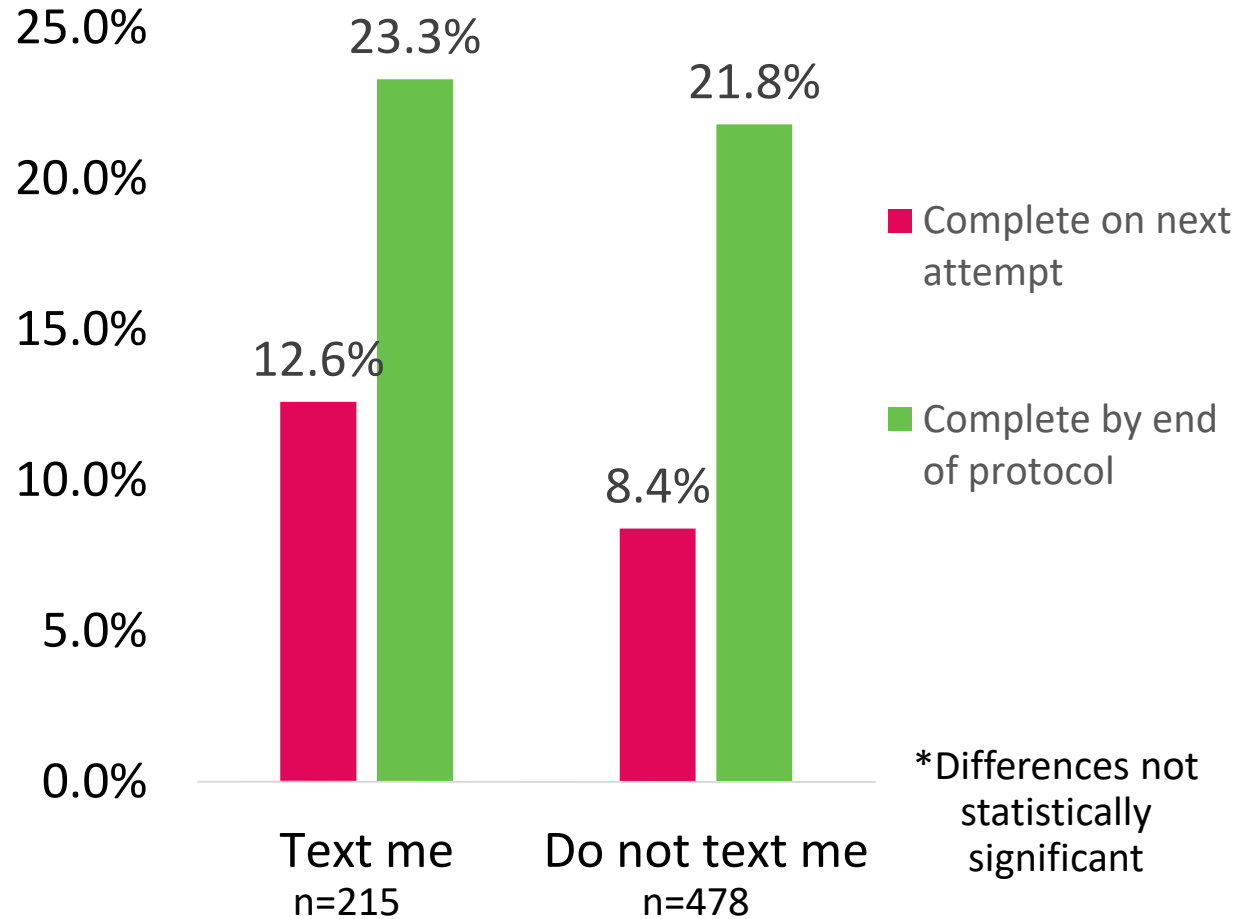
*Callbacks occurred within 30 minutes of appointment (87% of all callbacks)

What percent completed at next attempt and by end of protocol?

- **Complete on next attempt** (pink)
- **Complete by end of protocol** (green)

25.0%
20.0%
15.0%
10.0%
5.0%
0.0%

Text me n=215 — 12.6%, 23.3%

Do not text me n=478 — 8.4%, 21.8%

*Differences not statistically significant

Conclusions/Limitations

Conclusions

- Although SMS text messaging is mature technology for general usage, its application in survey research is less developed.

- Respondents that received a text message were more likely to complete the survey on both initial callback and by end of protocol
  - Differences not statistically significant
  - Ensuring callbacks occurred within 30 minutes of scheduled time had a modest increase in survey completion
    - Again – differences were not statistically significant

Limitations

- Not randomized experiment; self selection to receive text message may be indicative of greater likelihood of completing the survey regardless

- Lack of significant results may be a product of small sample sizes.

Additional Considerations

- **For this initial concept test we did not offer a reminder SMS text message for people who requested a same-day callback; however, in a future concept test we can adjust our technical set-up to include these cases.**

- **Future analysis should also compare outcomes with respondents not offered the SMS text message reminder on a future callback day.**

- **Although SMS text messaging reminders may improve telephone operational efficiency, researchers should measure that potential gain against the potential added burden to manage respondents' inbound SMS text messages.**

Questions?