QUEST MINDSHARE

Survey Screening (and Experience) Redefined:

A field test using AI-Led capabilities

Before we start…

In data collection, what's our greatest fear?

- **Many would say "fraud"**
  - What we prevent, or identify and throw out
- **I say this isn't what we fear most!!**
- What we fear **most** is **not catching the fraud we know we'll have**
  - And **passing along data from a survey that we don't know is bad.**

Where do we see survey fraud most?

Profiling – inaccurate records, wrong targeting

Screening – misrepresenting answers to qualify for surveys (& grab that cash!)

During the survey – in all sorts of ways, but especially crappy open-end responses, right?

Final dataset – from patterns across questions by respondent, and across respondents

If we want better data collection, how do we get it?

Typical processes have been used for decades:

- Make surveys more **engaging**
- Use **better incentives** (attracting bad guys more)
- Add **trap questions, attention checks**
- Leverage past **technology** to detect bad responses

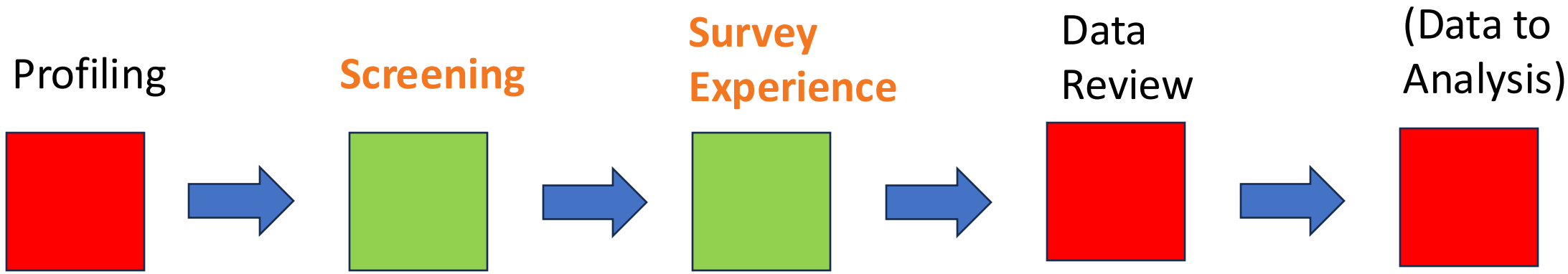
But what **newer methods** can improve fraud prevention and improve data collection/quality?

Yeah, AI stuff…right?

How many companies at Quirk's have new systems, platforms, solutions to change the game?

- Plenty offer "better" data collection methods
- My goal - improve screening (based on '24 RoR)
- Answer old questions about validating, confirming respondents
- **Came across two "AI-led"** I wanted to put next to a "traditional" way
    - One more "behavior" focused
    - One more about "engagement"

Where did we focus in end-to-end data collection?



We wanted to see how something new, something tech-led, could **make a difference in data collection**.

The approaches we chose were to **compare to what we had done**, and assess their **functionality on their own**.

What did Quest do? **Tested!!**

Fielded a "Typical B2B **Small Business** survey":

- 1-50 employees
- Decision-makers for financial relationship (FDMs)
- Common small business verticals
- Estimated 12 LOI, 20-25% IR after targeting

Ran three parallel surveys, using:

- Traditional approach
- "More engaging" approach
- "Watch behaviors more" approach

The three approaches: Quest

Our “traditional” fielding baseline.

- **Tech protections** automatically enabled during screening – digital fingerprinting, IP detection, respondent interaction with questions, etc.
- Use of **knowledge questions** specific to the audience
  - Based on 20 years of fielding B2B surveys and 1000+ per month
- Traditional **static screening** and questions
- “Status quo” for how online B2B quant surveys are served

The three approaches: Sentry

CloudResearch®

SENTRY
DATA QUALITY GOLD STANDARD

- Sentry **observes and flags** typical “bad” behaviors such as: geo-location, IP masking, and bot-like movement patterns.
- Steps up **behavioral fraud detection** - exiting to an **external browser** page, using **cut and paste** text answers, **translating** questions, using **ChatGPT**.
- Performs **multiple verification and validation** during screening.
- Also has **AI scoring system** – during screener and survey

The three approaches: inca

next intelligence | inca

Uses **inca**, an “inquisitive natural conversation agent” built for market research; **DIY!**

- ❑ Questions are presented as if you were **exchanging texts** with a friend
- ❑ “**SmartProbes**” can be inserted into the dialog, either “directed” or AI asks based on real-time language and sentiment analysis; **“bad” OEs followed up on right then**
- ❑ **AI review** throughout **scores respondents** as they go, can terminate or accumulate risk scores

What were we trying to find out?

Especially looking for:

- Where did a “new” approach deliver differently?
- Was it “better”? How and why?
- What drawbacks did it have?
- And, most importantly,

What can I take away and use from all this?

Let’s get to the survey results…

	Quest	inca	Sentry
Started	868	909	950
Attention checks	839	640	(flagged)
Screening	632	527	676
Knowledge question	437	279	336
Dropout	X	171	X
Open end review (manual)	300	X	X
AI OE Review (automated)	X	58	291
"Bad behavior" flags	X	X	126
Completed	120	58	104

Results highlights...Quest

Quest's "traditional" approach:

Knowledge question about cryptocurrency - **30% removed due to asking**. We like knowledge questions!

Weeded out more than 150 across 2 open ends after completion (Manually).

120 completed the survey successfully

Results highlights…Sentry

Metrics for “bad behavior” fails! **Tons of useful info provided for “flagged” vs. “passed”**.

OEs – no “follow-up” function but **good scoring capability** to see short or weird answers.

Not as deep an analysis on the OEs as inca, but clear look at **questionable OEs AND other bad behaviors** to weed out fails.

“Yea-saying” needed better tuning in our survey perhaps – watch closer after launch and tune.

When would I choose Sentry?

Conclusion: if I have a **high-volume survey** and are **concerned about bad behaviors like bots or click farms**, I'd choose Sentry for the **behavioral monitoring and multi-dimensional scoring**.

My output was very clear for line item "who did what" so I could see what data could be relied on.

Results highlights…inca

Didn't have "bad" behavior detection, **focused on engagement and OE analysis.**

Screening and attention checks "narrowed the funnel" faster

Once in, their participation was great – **really high quality OEs**, no one removed for that during the survey.

Strong participant feedback scores – added a question asking "how did you like this survey experience?"

- 84% said better than other surveys
- 43% saying "a lot better"

High dropout rate – less familiar format? Smartprobe OE follow-up? Fraudsters thinking they'd be caught more easily?

When would I choose inca?

Conclusion – if I want a **high-engagement survey** for a **higher-value audience**, I'd use inca for the depth and OE probing/scoring it provides. And the **favorable respondent ratings** for engagement.

These were **B2B contacts**, and they ***liked* the survey**.

And when's the last time you heard "**let's add more OEs to the survey**"?

Quest's Recommendations – Three Key Takeaways

LOTS of solutions for improving data collection out there.

- Use a provider with **experience in the solution they offer**, who will give you a look at how the tech works. Quest has 20-years in B2B fielding. Both our partners started in 2015 – ten years building what you see here.

Quest's Recommendations – Three Key Takeaways

One size never fits all. Where do you see issues, problems, fraud in your data collection? **Combine elements** of what I've shown today **for your use case**.

Try something new! Test it, make it jump through hoops, watch it fail, then adjust until it succeeds. But evolve! Talk to a bunch of companies here you might not approach, see what they have to offer, and **keep your mind open**.

Where's Quest going next with this topic?

More trial to see how the tech performs further.

- This is intriguing stuff (at least to my geeky MR way of thinking)

Possible integration with our platform– for use when clients need more, different, "better"

Continued focus on publishing what we find– the industry needs to hear more about actual testing, real-world results.

Shout-outs

Phil Sutcliffe and Ellie Ma, NEXXT Intelligence

For collaborating and showing me inca (and improving what I did!)

Blake Wardrop, Cloudresearch

For running the Sentry system and communicating at every step.

Kristina Norman and Kyle Sofianek, Quest

My intrepid team doing all the work behind the scenes. I owe them. A lot.

Thank You Thank You

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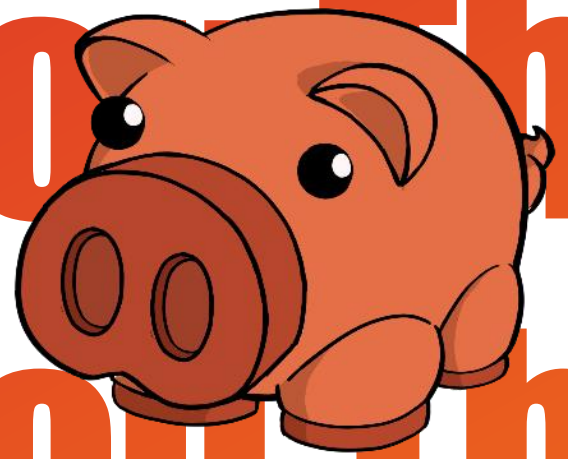

Thank You Thank You

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