

Data Collection Tools

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Assessment Tool 1: Employee Comfort Level with Cold Calling

[Google Forms Survey](#)

Rationale: One of the ways our client drums up business is by utilizing cold call lists. We wanted to determine the comfort level the employees have with cold calling and sending emails to potential clients from those lists. A survey provides us with a direct way to gather information on the employees feelings, needs, and suggestions. The survey questions allow for employees to openly answer questions on their comfort level conducting the task, but also their feelings toward any training and any suggestions they may have to better improve their current training.

We would like to gain an understanding of your comfort level and perceptions of cold calling potential clients. Your responses will help us better support you in this aspect of your role. Please answer the following questions as honestly as possible. All responses will be kept confidential.

Section 1: Background Information

1. Your role in the company?

(Open-ended question)

2. How long have you been in your current role?

- Less than 6 months
- 6 months - 1 year
- 1-3 years
- 3+ years

3. How often do you conduct phone calls to potential clients from the cold call list?

- Daily
- Weekly
- Monthly
- Rarely
- Never

4. How often do you send emails to potential clients from the cold call list?

- | | |
|----------------------------------|---------------------------------|
| <input type="checkbox"/> Daily | <input type="checkbox"/> Rarely |
| <input type="checkbox"/> Weekly | <input type="checkbox"/> Never |
| <input type="checkbox"/> Monthly | |
-

Section 2: Comfort Level with Cold Calling

5. How comfortable do you feel when making cold calls to potential clients?

- | | |
|---|---|
| <input type="checkbox"/> Very Comfortable | <input type="checkbox"/> Somewhat Uncomfortable |
| <input type="checkbox"/> Somewhat Comfortable | <input type="checkbox"/> Very Uncomfortable |
| <input type="checkbox"/> Neutral | |

6. How confident are you in your ability to effectively communicate with potential clients on cold calls?

- | | |
|---|---|
| <input type="checkbox"/> Very Confident | <input type="checkbox"/> Not Confident |
| <input type="checkbox"/> Confident | <input type="checkbox"/> Not Confident at All |
| <input type="checkbox"/> Neutral | |

7. Do you feel you have enough training and support to make cold calls effectively?

- | | |
|---|---|
| <input type="checkbox"/> Yes, definitely | <input type="checkbox"/> No, more support is needed |
| <input type="checkbox"/> Yes, but more support would be helpful | <input type="checkbox"/> No, I feel unprepared |
| <input type="checkbox"/> Not sure | |
-

Section 3: Comfort Level with Email Cold Call Clients

8. How comfortable do you feel emailing potential clients from a cold call list?

- | | |
|---|---|
| <input type="checkbox"/> Very Comfortable | <input type="checkbox"/> Somewhat Uncomfortable |
| <input type="checkbox"/> Somewhat Comfortable | <input type="checkbox"/> Very Uncomfortable |
| <input type="checkbox"/> Neutral | |

9. What are your biggest concerns when emailing potential clients for the first time? (Select all that apply)

- Fear of coming across too pushy or aggressive
 - Uncertainty about the content or tone of the email
 - Concern about legal or compliance issues (e.g., GDPR, opt-out regulations)
 - Not knowing enough about the client or their needs
 - Lack of response from potential clients
 - Other (please specify):
-

Section 4: Factors Influencing Comfort Level

10. Which of the following factors make you feel uncomfortable when making cold calls? (Select all that apply)

- Fear of rejection
- Lack of information about the client
- Uncertainty about what to say
- Fear of sounding too pushy
- Nervousness about speaking on the phone
- Lack of support from the team or manager
- Other (please specify):

11. How do you typically feel before making a cold call?

- Anxious or nervous
 - Neutral
 - Confident and prepared
 - Excited to connect with new clients
-

Section 5: Email Content and Strategy

12. Which of the following best describes your approach to writing cold emails?

- I follow a specific template and rarely make changes.
- I adapt a template but personalize the content for each client.
- I write each email from scratch based on the client's profile.

- I struggle to decide how to write the email and often feel uncertain.

13. Do you feel that the company's cold calling email templates are effective in initiating conversations with potential clients?

- Yes
- No
- Not sure

14. What improvements, if any, do you believe could be made to the cold-emailing process or templates?

(Open-ended response)

Section 6: Support and Improvement

15. What kind of support or resources would help you feel more comfortable with cold calling? (Select all that apply)

- More training on communication techniques
- Scripts or templates for calls
- Role-playing sessions
- More detailed client background information
- Regular feedback from managers
- Access to a mentor or coach
- Other (please specify):

16. Would you prefer more team collaboration or individual work when making cold calls?

- More team collaboration (e.g., team calls, group meetings)
- A mix of both team and individual work
- More individual work (e.g., solo calls with minimal collaboration)

17. Do you feel that you have received sufficient training or resources on how to email potential clients?

- Yes
- No
- Somewhat

18. How confident are you in your ability to craft an email that will engage a potential client?

- Very Comfortable
- Somewhat Comfortable
- Neutral
- Somewhat Uncomfortable
- Very Uncomfortable

Section 7: General Feedback

19. What do you enjoy most about cold calling?

(Open-ended question)

20. What challenges do you face when making cold calls, and how do you overcome them?

(Open-ended question)

21. Is there anything else you would like to share about your experience with cold calling?

(Open-ended question)

22. Do you have any additional feedback on how to improve the comfort and effectiveness of emailing potential clients?

(Open-ended response)

End of Survey

Thank you for completing this survey! Your feedback is invaluable in helping us improve the client recruiting process and provide better support to all employees.

Assessment Tool 2: Post Cold-Call/Post Cold-Email Survey (or Post-Introductory Conversation Survey)

[Google Forms Survey](#)

Rationale: We decided to use a survey in particular because we decided it is the most simple and efficient way to receive information from potential clients after the first cold call/email, especially if they're not receptive to a full interview. We wanted to survey this population in particular so we can assess the reasons for why some companies choose to hire Personality Pool and why others choose not to. If there is an element within the cold email/cold call that either attracts or puts people off, this will be good to know so Personality Pool can meet their goals of gathering more clients.

We would like to gain an understanding of your first experience communicating with Personality Pool representatives. Your responses will help us better support you and other potential clients in the future. Please answer the following questions as honestly as possible. All responses will be kept confidential.

Section 1: Background Information

1. What services does your organization provide?

(Open-ended question)

2. How did you first hear about Personality Pool?

- They cold called me
- They cold emailed me
- I found them on the Internet
- I heard from them from word of mouth
- Other (please specify)

3. For applicants applying to entry level positions, do you have more of a preference for their technical hard skills or personal soft skills?

- Strong preference for hard skills
- Slight preference for hard skills
- Equal preference for hard skills and soft skills
- Slight preference for soft skills
- Strong preference for soft skills
- No preference

4. Does your organization have entry level positions, such as those that rely more on soft personal skills than hard technical skills, that need to be filled?

- Yes
- No

5. If you answered yes to the last question, are you currently hiring or have recently (within the last six months) hired for these positions?

- Yes
- No

6. If you answered yes to the last question, how would you rate the quality of your entry-level applicant pool?

- Very satisfactory
- Satisfactory
- Neutral
- Unsatisfactory
- Very unsatisfactory

7. Could you explain your reasoning for how you rated the quality of your entry-level applicant pool?

(Open-ended question)

8. If you have recently (within the last six months) hired entry-level employees, how satisfied are you with their fit with your organization?

- Very satisfied
- Satisfied

- Neutral
- Unsatisfied
- Very unsatisfied

9. If you are satisfied or very satisfied with their performance, how much of your satisfaction is correlated with their level of soft skills (personality, communication, etc.)?

- Strongly correlated
- Slightly correlated
- Neutral
- Not correlated at all
- N/A

Can you expand on that?

(Open-ended question)

10. If you are unsatisfied or very unsatisfied with their performance, how much of your satisfaction is correlated with their level of soft skills (personality, communication, etc.)?

- Strongly correlated
- Slightly correlated
- Neutral
- Not correlated at all
- N/A

Can you expand on that?

(Open-ended question)

Section 2: Call/Email Experience

1. Was your first communication from Personality Pool done through a phone call, email, or other medium?

- Phone call
- Email

Other (please clarify)

2. If you were cold called or cold emailed, how open were you to engaging with this representative?

- Very open
- Slightly open
- Not open

3. If you were not open to engaging with this representative, what prevented you from feeling receptive to such communication?

(Open-ended question)

4. If you were not open to engaging with this representative, was there something the representative could have said or done that would have made you feel more open to engagement?

(Open-ended question)

5. If you did engage with the Personality Pool representative, how professional was your conversation with them?

- Very professional
- Slightly professional
- Not professional or unprofessional
- Slightly unprofessional
- Very unprofessional

6. How thoroughly did this representative explain Personality Pool's services to you?

- Very thoroughly
- Slightly thoroughly
- Not thoroughly

7. Was there any part of this Personality Pool representative's explanation that caused any confusion, doubt, or reluctance to engage further?

(Open-ended question)

8. How satisfied were you after your initial conversation with this Personality Pool representative?

- Very satisfied
- Slightly satisfied
- Neutral
- Slightly unsatisfied
- Very unsatisfied

Could you expand on your last answer?

9. Was there anything that you think should be changed or added to future cold calls/emails to potential clients?

(Open-ended question)

Section 3: Next Steps

1. After your communication with Personality Pool, what are your next steps?

- Ask for more information from a Personality Pool representative
- Request to sign up for Personality Pool's services
- Decline to pursue any further communication with Personality Pool
- Other (please specify)

2. If you would like to ask for more information from Personality Pool or sign up for their services, what about your communication with them has interested you in maintaining contact?

(Open-ended question)

3. If you chose to decline further communication with Personality Pool, what about your communication with them has prevented interest in maintaining contact?

(Open-ended question)

Could the representative have said or done something differently that might have changed your mind?

- 4. If you want to use Personality Pool's services, in what ways do you think it will serve your organization?**

(Open-ended question)

- 5. If you don't want to use Personality Pool's services, in what ways do you think it will not serve your organization?**

(Open-ended question)

End of Survey

Thank you for completing this survey! Your feedback is invaluable in helping us improve our outreach to potential clients.

Interview: Current Clients

The purpose of this interview is to gain a better understanding of why employers have chosen Personality Pool and the experience they have had so far. We would like to gather information on how they have seen improvements in staffing. These questions not only focus on personal “feelings”, but the data behind their staffing.

- 1.) What made you choose Personality Pool for your staffing needs?
- 2.) How did you initially hear about Personality Pool?
- 3.) How do you feel about the customer service that has been provided?
- 4.) What training has been provided on the use of the Personality Pool product? What have you liked/disliked about the training?
- 5.) Have you seen an improvement in candidates that applied for open positions? How so?
- 6.) Have you seen an improvement in quality of those hired since using Personality Pool? How so?
- 7.) Have you seen an improvement in length of employment since using Personality Pool? Can you give us examples?
- 8.) Would you recommend Personality Pool to fellow businesses?