

DATA SHEET

Forsta CATI

Innovative and efficient
telephone interviewing



What is Forsta CATI?

Forsta CATI is the telephone interviewing module of Forsta Survey, our flexible, multi-mode solution for Market Research, Voice of the Customer and Employee programs. Forsta CATI is used by some of the world's largest Market Research organizations and is built on over 30 years of experience in providing business critical CATI solutions to the market.

You can carry out Market Research, Voice of the Customer or Employee programs on the telephone, and manage all of the processes involved in telephone research. It also allows you to develop mixed mode research programs by integrating telephone-based research with web, email, SMS, IVR, mobile applications, paper and face-to-face feedback.

Why Forsta CATI?

To compete successfully, whatever the size or scale of your telephone interviewing operation, a modern CATI center must be an efficient, productive environment which is flexible enough to respond to the demands of customers immediately.

With Forsta CAPI your business can:

- **Maximize productivity:** by making the best possible use of your people, your sample and your processes.
- **Improve quality:** by running a highly reliable and integrated end-to-end CATI solution which integrates seamlessly with a range of other data collection channels.
- **React fast:** by providing unlimited scalability so you're able to take on any project, large or small, and know that your solution can keep up.

Key Benefits

- Fully-integrated mixed-mode data collection, harnessing the power of the Forsta Survey platform
- Easy to scale up or down, depending on your needs
- Complies with all MRS/CASRO code of conduct requirements
- Forsta REST API to easily integrate with third party dialers using simple HTTP methods
- Support for multiple dialing scenarios combined with search and reporting capabilities to demonstrate compliance with the Telephone Consumer Protection Act (TCPA)



Maximize productivity

For telephone interviewing, time equals cost, so it's critical that you're able to get the most from your key asset – your interviewers. Forsta CATI offers several ways to maximize the productivity of your interviewing team.

Quality control and reviewing

The supervisor can drop in on any interview as it takes place and monitor both audio and screen visuals for quality control and training. During live monitoring the supervisor can also send instant messages to interviewers. Video playback is available for any previously conducted interviews and the supervisor (or a dedicated reviewer) can put a selection of interviews and questions into the reviewer application to quickly check and clean responses. Whilst reviewing, the system maintains a session so that the reviewer can break-off and return to the review process at any time and a full audit trail of changes is automatically kept in a review log.

Forsta REST API

The Forsta CATI REST API is provided with an SDK which enables you to integrate Forsta CATI with your internal systems using simple HTTP methods. A typical use case is to use the Forsta CATI REST API to derive payroll information from the CATI system to calculate interviewer pay. The following areas of Forsta CATI can be integrated with your systems programmatically:

- Export call history and interviewer break data
- Manage Interviewer accounts
- Manage Interviewer assignments
- Open and close surveys
- Export Interviewer session data (login and logout timing information)
- Apply CATI survey settings (e.g. call scheduling rules or custom call disposition labels)

Productivity reports and real-time dashboards

Forsta CATI's performance monitoring capabilities enable your supervisors to gain exceptional visibility into how your interviewers are working.

Using the real-time dashboards it's possible to instantly compare interviewer strike rates and be automatically alerted to slow (or abnormally fast) progression through live interviews. Supervisors can easily keep track of many surveys and interviewers at the same time while keeping a tight grasp on call priorities and quota progress.

A wide variety of built in reports designed to monitor the productivity of the survey, interviewers, sample and quotas can be viewed on screen, emailed or exported to various formats. Outstanding performance visibility means interviewers and supervisors can become far more productive which contributes significantly to reducing costs.

Manage distributed workers

Distributed workers – and increasingly homeworkers – are core to the nature of many CATI operations, particularly those operating in multiple languages. Forsta CATI's virtual call center and centralized management capabilities are ideally suited to handle this, and help you to ensure you've got the right people on the right jobs, no matter where in the world they're located.

Automated dialing

Forsta CATI supports a wide range of options to increase the rate of connected calls. Solutions range from simple click-to-dial VoIP integrations to industry leading CATI dialers, which provide many added benefits such as:

- Progressive, Predictive and Preview dialing modes
- Fully automated outcome capture
- Supervisory interface based control of live call monitoring
- Supervisory interface based control of recorded interviews

Manage sample

To operate effectively across all your interviewing projects, it's vital that you manage your sample effectively and efficiently. With Forsta CATI, you can manage all aspects of your projects, including quotas to make the most from your sample, and ensure that interviewer time is utilized effectively.

With tailoring tools, you can set customized requirements for areas like call-back, depending on your target audiences (such as consumers vs. businesses) so you're always operating at peak efficiency and maximizing your strike rate per sample.

Maximize quality

Ensuring your interviewers are not only productive, but deliver accurate results, is key to retaining your customers for future projects. Forsta CATI, as part of the Forsta Survey solution, ensures high-quality experiences not only to participants, but to your interviewers as well, increasing engagement and maximizing response rates.

An end-to-end solution

To maximize the quality and effectiveness of your CATI projects, you can use the survey authoring engine of Forsta Survey to develop your surveys. Your collected data can be fed into Forsta SmartHub™, so that all the power of the analytics and reporting within Survey are available to you. Furthermore, robust questionnaire capabilities are supported across modes to ensure consistency in multi-mode projects. This means all of your survey processes and data stay within the Forsta Survey platform, providing you with an end-to-end solution that delivers accurate, actionable insight.

Wider choice for participants

Telephone interviewing is just one of the multiple data collection channels that Forsta Survey offers. Our multi-channel approach yields benefits that extend beyond those of any other single-mode solution. It allows you to integrate feedback gathered from your telephone projects with data gathered from all other channels – web, email, mobile Apps, IVR, SMS, paper and CAPI – so you can gain a holistic view of all feedback. You can even empower participants to switch between survey channels – e.g. from telephone to web – and back again via appointment if necessary, without needing a separate questionnaire.

Sophisticated interviewer experience

Interviewers perform better when they have a slick and sophisticated interface to work with. Forsta CATI supports all the critical capabilities of a modern CATI system such as redialing dropped calls, spell checking open-ends, managing call back appointments and taking breaks. The interviewer's experience is fully customizable allowing for complete layout control, inserting dynamic header information, bespoke client side scripts and branding of the project they are working on. Keyboard inputs and shortcuts mirror all mouse controls to enable interviewers to navigate quickly through the survey, and so interviewers are able to work in the way that suits them best. The supervisor has complete control over how interviews are served up to interviewers but they can also release some of this responsibility to interviewers so that they themselves might choose which surveys or interviews they work on. Forsta's seamless survey switching feature allows supervisors to quickly transfer interviewers from one job to another without any downtime or interruptions.



Seamlessly integrate your internal systems

- Flexible dialing options with support for the industry leading CATI dialers:
 - Forsta 'TCI' Dialer
 - Third Party Dialers like Sytel, InVADE, Authensis, Pro-TS etc.
- Click-to-Dial Integration
- Open Dialer API (enabling connections to third party dialers)

React fast with Forsta CATI

Customers have higher expectations than ever before, and need you to get started on their projects – and deliver results – as quickly as possible. Forsta CATI's flexibility and scalability ensure that you can take on multiple projects, regardless of size and deliver high quality insights back to customers faster than ever before.



Scalability

Forsta CATI is a highly-scalable system, able to handle the most complex surveys and the needs of large call center operations. Businesses running Forsta CATI are able to make hundreds of thousands of calls every day, to deliver results to their customers when needed, without worrying about downtime.



Burstability

To ensure that you can react quickly to the demands of your customers, Forsta CATI can be scaled up in a matter of hours so you can add extra seats and get started on new projects straight away. Whether your additional seats are located within your CATI center, or if you're adding remote or homeworkers to your team, you have the flexibility you need to meet your customers' demands.

How can I get started

With Forsta, there's a lot to love and it's hard to sum up in a single document. If you'd like to learn more about Forsta's solutions, check out our website or give us a call! We'd be delighted to answer all your questions and provide a demonstration.

About Forsta

Forsta provides Customer Experience and Research Technology for some of the world's most ambitious organizations.

From CX to Surveys, Online Qual, Reporting, Online Diaries & Dashboards, our tools help them discover, understand, and share smart insights packed with real action potential.



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