

empanel  
ONLINE



**ESOMAR**  
WORLD RESEARCH

37 QUESTIONS  
for online sample buyers



# Introduction

*The primary aim of these 37 Questions is to increase transparency and raise awareness of the key issues for researchers to consider when deciding whether an online sampling approach is fit for their purpose. Put another way, the aim is to help you to ensure that what you receive meets your expectations.*

*The questions identify the key issues to consider, introduce consistent terminology, explain why each question should be asked, and note the issues buyers should expect to be covered in an answer. The intended use of these questions is that they form a basis for a conversation between buyer and sample provider, rather than simply being used as a checklist to compare offerings across providers.*

*These 37 questions do not specifically cover B2B samples, nor do they attempt to cover specific requirements for different types of research such as pricing, new product development, ad testing etc.*

## EMpanel Online

# 1

*EMpanel Online has been providing high-quality, online sample since 2005. Our panel is 100% focused on research and is not used for direct marketing or any other purpose. From specialty B2B targets to Healthcare and ailment communities, we have helped to complete over 20,000 online research projects.*

*Our company was started by an experienced executive team with decades of experience in MR and online communities. Our diverse team of researchers, developers, and project managers help us to provide our clients with reliable sample quality and innovative technology that gets the job done.*

*Our systems, policies, and processes reflect the best-in-class online sample products and services. We utilize a proprietary suite of sophisticated, yet user-friendly, research products, including: SurValidate, SurveyHub, Industry Yardstick, and more under our wholly owned subsidiary, Bizpinion.*

# Purpose & Scope

DO YOU HAVE STAFF WITH RESPONSIBILITY FOR DEVELOPING AND MONITORING THE PERFORMANCE OF THE SAMPLING ALGORITHMS AND RELATED AUTOMATED FUNCTIONS WHO ALSO HAVE KNOWLEDGE AND EXPERIENCE IN THIS AREA? WHAT SORTS OF TRAINING IN SAMPLING TECHNIQUES DO YOU PROVIDE TO YOUR FRONTLINE STAFF?

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Our sales, operations, project management and sampling teams are trained to read specifications, understand project scope, and sample efficiently and effectively using our internal tools and the systems/portals provided by our clients.

We are primarily focused on B2B and Healthcare audiences that are best reached through deliberate, manual sampling, so automation has not been a priority, but we will continue to follow the best practices within the market research industry.

WHAT OTHER SERVICES DO YOU OFFER? DO YOU COVER SAMPLE-ONLY OR DO YOU OFFER A BROAD RANGE OF DATA COLLECTION AND ANALYSIS?

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EMpanel Online is primarily focused on sample-only, B2B and Healthcare audiences for quantitative, online projects. In addition to our core capabilities, we have the experience and capacity to successfully work with third-party, strategic partners to execute full-service projects, including programming, hosting, coding, qualitative recruitment, and analysis.

# Company Profile

FROM WHAT SOURCES OF ONLINE SAMPLE DO YOU DERIVE PARTICIPANTS?

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EMpanel Online exclusively uses panel sample. As a leader in B2B sample quality, our experience has shown that intercept sample is not sufficiently vetted or of reliable quality for our clients.

# Sample Sources & Recruitment

WHICH OF THESE SOURCES ARE PROPRIETARY OR EXCLUSIVE AND WHAT IS THE PERCENT SHARE OF EACH IN THE TOTAL SAMPLE PROVIDED TO A BUYER?

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EMpanel Online uses proprietary panel in quotation. We also have the ability to quickly connect with strategic partner panels to augment our feasibility when required.

WHAT RECRUITMENT CHANNELS ARE YOU USING FOR EACH OF THE SOURCES YOU HAVE DESCRIBED? IS THE RECRUITMENT PROCESS 'OPEN TO ALL' OR BY INVITATION ONLY? ARE YOU USING PROBABILISTIC METHODS? ARE YOU USING AFFILIATE NETWORKS AND REFERRAL PROGRAMS AND IN WHAT PROPORTIONS? HOW DOES YOUR USE OF THESE CHANNELS VARY BY GEOGRAPHY?

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We employ many recruitment channels including online, phone, and direct registration. This multichannel approach ensures a wide and balanced reach across the entire sample universe. These various sources have been developed with the provision that we would be able to tailor our assets to our clients' request. If there is a concern with any particular method of recruitment, we can limit based on our clients' stated needs.

WHAT FORM OF VALIDATION DO YOU USE IN RECRUITMENT TO ENSURE THAT PARTICIPANTS ARE REAL, UNIQUE, AND ARE WHO THEY SAY THEY ARE?

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EMpanel Online employs a proprietary, digital-fingerprinting and fraud protection service, SurValidate, to eliminate duplicate respondents and flag potentially fraudulent activity across all recruitment channels. SurValidate is fully integrated into Survey Hub, our sample and affiliate management platform to manage ongoing validity and duplication checks in real-time, across all projects. In addition to SurValidate, we use two-step verification and a 3rd party verification service to vet and validate respondents online using LinkedIn and other publicly available information. Accredited B2B respondents are verified against known industry standard registries (MD, CPA, etc.).

WHAT BRAND (DOMAIN) AND/OR APP ARE YOU USING WITH PROPRIETARY SOURCES?

The primary sample engine for EMpanel Online is Pangaea, but we also have worked with clients to set up and manage custom/specialty panels.

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WHICH MODEL(S) DO YOU OFFER TO DELIVER SAMPLE? MANAGED SERVICE, SELF-SERVE, OR API INTEGRATION?

EMpanel Online is a managed service, sample provider. We do not currently offer Self-serve or API.

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IF OFFERING INTERCEPTS OR PROVIDING ACCESS TO MORE THAN ONE SOURCE, WHAT LEVEL OF TRANSPARENCY DO YOU OFFER OVER THE COMPOSITION OF YOUR SAMPLE (SAMPLE SOURCES, SAMPLE PROVIDERS INCLUDED IN THE BLEND)?

EMpanel Online does not utilize or endorse intercept sampling for B2B audiences.

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OF THE SAMPLE SOURCES YOU HAVE AVAILABLE, HOW WOULD YOU DESCRIBE THE SUITABILITY OF EACH FOR DIFFERENT RESEARCH APPLICATIONS? IS YOUR SAMPLE SUITABLE FOR PRODUCT TESTING OR OTHER RECRUIT/RECALL SITUATIONS? IS THE SAMPLE SUITABLE FOR SHORTER OR LONGER QUESTIONNAIRES? IS IT SUITABLE TO RECRUIT FOR COMMUNITIES? FOR ONLINE FOCUS GROUPS?

EMpanel Online is primarily focused on sampling for Quantitative studies. We do not ask our members to join other communities and are very selective about what types of qualitative projects we offer them. We do not conduct product tests.

With B2B respondents, we find that quality dips significantly after 30 minutes, so we rarely participate in projects with longer questionnaires.

With recruit/recall setups, we encourage transparency about how/when a member will be recontacted to participate in ongoing research for the same project. This, along with the right incentives, will help to improve the response rates for additional phases of the project.

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# Sampling & Project Management

BRIEFLY DESCRIBE YOUR OVERALL PROCESS FROM INVITATION TO SURVEY COMPLETION. WHAT STEPS DO YOU TAKE TO ACHIEVE A SAMPLE THAT “LOOKS LIKE” THE TARGET POPULATION? WHAT DEMOGRAPHIC QUOTA CONTROLS, IF ANY, DO YOU RECOMMEND?

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Respondents are sent a generic invitation to avoid creating response bias in the data. The information provided within the invitation includes the expected length of interview (LOI), incentive offered for successful participation, and the respondent’s unique entry link to the project. Invites are customizable; however, we never recommend disclosing any qualifying criteria prior to screening.

Once a member is invited to participate in a project, we can remind them several times to respond after the initial invitation. When they agree to participate, their account credentials are verified, they are checked against previous respondents for duplication and indicators of fraud. We have the capability to prescreen respondents prior to entering the survey.

As the respondent enters the client hosted survey, their ID is passed into the program and all control of the process is out of our hands until the ID is passed back to our end pages with a determinant status (complete, terminated, QF, etc.). We can track/monitor completion times, IR (incidence rate), and DOR (dropout rate), however, these are passive actions and not something that we rely on to control quality.

WHAT PROFILING INFORMATION DO YOU HOLD ON AT LEAST 80% OF YOUR PANEL MEMBERS PLUS ANY INTERCEPTS KNOWN TO YOU THROUGH PRIOR CONTACT? HOW DOES THIS DIFFER BY THE SOURCES YOU OFFER? HOW OFTEN IS EACH OF THOSE DATA POINTS UPDATE? CAN YOU SUPPLY THE DATA POINTS AS APPENDS TO THE DATA SET? DO YOU COLLECT THIS PROFILING INFORMATION DIRECTLY OR IS SUPPLIED BY A THIRD PARTY?

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*Email / Phone / Age / Gender / Postal Code / Ethnicity / Company Size / Job Title*

Our profiling is flexible and ties directly into our sample management and project management platforms. Our community members are encouraged to update their profiles regularly and encouraged to do so at least twice a year. We also have the ability to update respondent profiles with data generated from prescreening and specific project qualifiers. We can utilize this profile data for respondent verification, data appends, or for future targeting. The type of information we collect includes demographic, psychographic, and behavioral, as well as “firmographic” information on business respondents – company size, industry, professional title, and decision-making authority in over 40 categories.

We can provide appended data for a fee; however, we recommend that these questions be asked within the survey to guarantee the most up-to-date information and the most efficient process.

WHAT INFORMATION DO YOU NEED ABOUT A PROJECT IN ORDER TO PROVIDE AN ESTIMATE OF FEASIBILITY? WHAT, IF ANYTHING, DO YOU DO TO GIVE UPPER AND LOWER BOUNDARIES AROUND THESE ESTIMATES?

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Ideally, we would request the full screener and questionnaire, but EMpanel Online can provide a basic estimate with the following information:

- Type of Study/Methodology
- Devices allowed (Device Agnostic preferred)
- N (number of complete requested)
- LOI (minutes)
- IR (incidence rate %) with targeting assumptions
- # Open Ends within the survey (we recommend 3 or fewer for quantitative projects)
- Past participation/lockout requirements (for tracking projects)
- PII Requirements and Terms (if applicable)
- Field timing
- Quota Requirements

Our basic quote will assume that the project is quantitative in nature, with no personal information being collected and 3 or fewer open-ended responses being required.

WHAT DO YOU DO IF THE PROJECT PROVES IMPOSSIBLE FOR YOU TO COMPLETE IN FIELD? DO YOU INFORM THE SAMPLE BUYER AS TO WHO YOU WOULD USE TO COMPLETE THE PROJECT? IN SUCH CIRCUMSTANCES, HOW DO YOU MAINTAIN AND CERTIFY THIRD PARTY SOURCES/SUB-CONTRACTORS?

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If a project proves impossible, we will first try to understand where the specification and expectations have fallen short and why our sample is not performing. If we feel that adding partners will be successful, then we have a list of trusted and vetted resources who meet our high standards.

DO YOU EMPLOY ANY SURVEY ROUTER OR ANY YIELD MANAGEMENT TECHNIQUES?

EMpanel Online does not utilize or endorse router sampling for B2B audiences. We can manage top-line quotas with internal quota stops, however, it is always best if quotas are managed within the survey program itself.

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DO YOU SET LIMITS ON THE AMOUNT OF TIME A PARTICIPANT CAN BE IN THE ROUTER BEFORE THEY QUALIFY FOR A SURVEY?

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EMpanel Online does not utilize or endorse router sampling for B2B audiences.

WHAT INFORMATION ABOUT A PROJECT IS GIVEN TO POTENTIAL PARTICIPANTS BEFORE THEY CHOOSE WHETHER TO TAKE THE SURVEY OR NOT? HOW DOES THIS DIFFER BY THE SOURCES YOU OFFER?

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Respondents are sent a generic invitation to avoid creating bias in the data. The information provided within the invitation includes the expected length of interview (LOI), incentive offered for successful participation, and the respondent's unique entry link to the project. Invites are customizable; however, we never recommend disclosing any qualifying criteria prior to screening.

DO YOU ALLOW PARTICIPANTS TO CHOOSE A SURVEY FROM A SELECTION OF AVAILABLE SURVEYS? IF SO, WHAT ARE THEY TOLD ABOUT EACH SURVEY THAT HELPS THEM TO MAKE THAT CHOICE?

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EMpanel Online does not utilize or endorse a forum/list for sampling B2B audiences. We are targeting our invites based on the survey specifications. Within our member portal, members can see open opportunities to which they have been invited, displayed by Topic, LOI and Incentive.

WHAT ABILITY DO YOU HAVE TO INCREASE (OR DECREASE) INCENTIVES BEING OFFERED TO POTENTIAL PARTICIPANTS (OR SUB-GROUPS OF PARTICIPANTS) DURING THE COURSE OF A SURVEY? IF SO, CAN THIS BE FLAGGED AT THE PARTICIPANT LEVEL IN THE DATASET?

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Incentives are specific to each project and target respondent, so we automatically build in an incentive range with our pricing which allows for some flexibility to increase response rates while in field. If requested, we can increase all incentives by a specific amount with a matching increase to the CPC and apply the new rate to additional completes from that point forward. However, we feel that this technique should be used sparingly as it can cause a conditional response of respondents to wait for more incentives.



DO YOU MEASURE PARTICIPANT SATISFACTION AT THE INDIVIDUAL PROJECT LEVEL? IF SO, CAN YOU PROVIDE NORMATIVE DATA FOR SIMILAR PROJECTS (BY LENGTH, BY TYPE, BY SUBJECT, BY TARGET GROUP?)

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The success of our panel business depends on the satisfaction of our members. We do not inundate our members with additional surveys regarding their experiences, but we do monitor flags, complaints, and opt-outs at the project level.

Our sample team regularly engages with our members to work through any issues. We also track satisfaction trends by LOI, Number of OEs, and common sample targets and survey topics.

DO YOU PROVIDE A DEBRIEF REPORT ABOUT A PROJECT AFTER IT HAS BEEN COMPLETED? IF YES, CAN YOU PROVIDE AN EXAMPLE?

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The screening questions within a specific survey are rarely a perfect match to our internal respondent profiles, but EMpanel Online will gladly share our internal monitoring metrics at any point during a project for visibility.

## *Data Quality & Validation*

HOW OFTEN CAN THE SAME INDIVIDUAL PARTICIPATE IN A SURVEY? HOW DOES THIS VARY ACROSS YOUR SAMPLE SOURCES? WHAT IS THE MEAN AND MAXIMUM AMOUNT OF TIME THAT A PERSON MAY HAVE ALREADY BEEN TAKING SURVEYS BEFORE THEY ENTERED THIS SURVEY? HOW DO YOU MANAGE THIS?

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A single individual is never allowed to participate in the same survey more than once unless specified by our client. Members are allowed to manage how frequently they would like to receive new survey invitations. We limit each member to one survey completion each day, with a maximum of 3 completions each week and 8 completions per month.

WHAT DATA DO YOU MAINTAIN ON INDIVIDUAL PARTICIPANTS SUCH AS RECENT PARTICIPATION HISTORY, DATE(S) OF ENTRY, SOURCE/CHANNEL, ETC.? ARE YOU ABLE TO SUPPLY BUYERS WITH A PROJECT ANALYSIS OF SUCH INDIVIDUAL LEVEL DATA? ARE YOU ABOUT TO APPEND SUCH DATA POINTS TO YOUR PARTICIPANT RESEARCH?

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We log a member's recruitment source and complete participation history. This information is not shared with clients; however, we are able to exclude members based on past participation in a specific project or series of projects and/or recent category participation upon request.

PLEASE DESCRIBE YOUR PROCEDURES FOR CONFIRMATION OF PARTICIPANT IDENTITY AT THE PROJECT LEVEL. PLEASE DESCRIBE THESE PROCEDURES AS THEY ARE IMPLEMENTED AT THE POINT OF ENTRY TO A SURVEY OR ROUTER.

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SurValidate works with SurveyHub, our sample and affiliate management platform to manage ongoing validity and duplication checks in real-time, across all projects. Within each project, SurValidate will monitor any inconsistencies or anomalies with the member's account. If any are found, such as an unrecognized device, a 2-step verification process is initiated before a member is allowed to enter the survey. Encrypted end pages are an additional security measure to prevent respondents from skipping the survey to cheat the system. EMpanel Online encourages our clients to include QC questions to further determine whether a given respondent is adequately knowledgeable on the relevant topic and is giving their full attention.

HOW DO YOU MANAGE SOURCE CONSISTENCY AND BLEND AT THE PROJECT LEVEL? WITH REGARDS TO TRACKERS, HOW DO YOU ENSURE THAT THE NATURE AND COMPOSITION OF SAMPLE SOURCES REMAIN THE SAME OVER TIME? DO YOU HAVE REPORTS ON BLENDS AND SOURCES THAT CAN BE PROVIDED TO BUYERS? CAN SOURCE BE APPENDED TO THE PARTICIPANT DATA RECORDS?

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Ahead of each project, EMpanel Online encourages our clients to develop an outline for sample representativeness and consistency that is realistic and achievable. For tracking projects, we understand the importance of maintaining a consistent and predictable blend. This source data cannot be appended.

PLEASE DESCRIBE YOUR PARTICIPANT/MEMBER QUALITY TRACKING, ALONG WITH ANY HEALTH METRICS YOU MAINTAIN ON MEMEBERS/PARTICIPANTS AND HOW THOSE METRICS ARE USED TO INVITE, TRACK, QUARANTINE, AND BLOCK PEOPLE FROM ENTERING THE PLATFORM, ROUTER, OR SURVEY.

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The process of integrating survey-level quality assurance is vital to our broader efforts to maintain and cultivate a healthy panel. We monitor participant behavior through internal metrics supplement what we can track with information collected by our client in each project. With this information, we can monitor behavioral patterns and flag respondent profiles appropriately. If a member becomes inactive or demonstrates other actionable behavior, we will quarantine the member for a period of time or completely exclude them from future opportunities.

FOR WORK WHERE YOU PROGRAM, HOST, AND DELIVER THE SURVEY DATA, WHAT PROCESSES DO YOU HAVE IN PLACE TO REDUCE OR ELIMINATE UNDESIRE IN-SURVEY BEHAVIORS?

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EMpanel Online recommends the industry best practices for in-survey quality assurance. We do not provide Programming, Hosting, or Analysis. We can work with all providers of these services and will recommend 3rd party partners if needed.

## *Policies & Compliance*

PLEASE PROVIDE THE LINK TO YOU PARTICIPANT PRIVACY POLICY

<https://empanelonline.com/privacy-policy/>

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HOW DO YOU COMPLY WITH KEY DATA PROTECTION LAWS AND REGULATIONS THAT APPLY IN THE VARIOUS JURISDICTIONS IN WHICH YOU OPERATE? HOW DO YOU ADDRESS THE REQUIREMENTS REGARDING CONSENT OR OTHER LEGAL BASES FOR PROCESSING PERSONAL DATA? HOW DO YOU ADDRESS THE REQUIREMENTS FOR DATA BREACH RESPONSE, CROSS-BORDER TRANSFER, AND DATA RETENTION? HAVE YOU APPOINTED A DATA PROTECTION OFFICER?

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EMpanel Online’s guiding principle is to develop a trust not only with our clients, but also with our members. To fulfill this obligation to our members, we prioritize their privacy and do not share their personal information without their expressed and specific consent.

For additional information regarding data processing, breach response, retention, and transfer, please download our Data Security & Compliance whitepaper <https://empanelonline.com/downloads/>

Data Protection Officer – [dpo@empanelonline.com](mailto:dpo@empanelonline.com)

HOW CAN PARTICIPANTS PROVIDE, MANAGE, AND REVISE CONSENT FOR THE PROCESSING OF THEIR PERSONAL DATA? WHAT SUPPORT CHANNELS DO YOU PROVIDE FOR PARTICIPANTS?

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For information regarding members’ data rights, individual management options and consent, please download our Data Security & Compliance whitepaper <https://empanelonline.com/downloads/>

HOW DO YOU TRACK AND COMPLY WITH OTHER APPLICABLE LAWS AND REGULATION, SUCH AS THOSE THAT MIGHT IMPACT THE INCENTIVES PAID TO PARTICIPANTS?

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EMpanel Online complies with all applicable laws and regulations. Our incentives are structured according to the governing rules in each area where we have members.

WHAT IS YOUR APPROACH TO COLLECTING AND PROCESSING THE PERSONAL DATA OF CHILDREN AND YOUNG PEOPLE? DO YOU ADHERE TO STANDARDS AND GUIDELINES PROVIDED BY ESOMAR OR GRBN MEMBER ASSOCIATIONS? HOW DO YOU COMPLY WITH APPLICABLE DATA PROTECTION LAWS AND REGULATIONS?

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EMpanel Online adheres to all standards and guidelines provided by ESOMAR, COPPA, GRBM and other jurisdictional bodies. Our panelists are primarily working professionals. We do not recruit or knowingly empanel any person under the age of 18.

DO YOU IMPLEMENT “DATA PROTECTION BY DESIGN” IN YOUR SYSTEMS AND PROCESSES? IF SO, PLEASE DESCRIBE HOW.

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For information regarding EMpanel Online’s strategy of Data Protection by Design, please download our Data Security & Compliance whitepaper <https://empanelonline.com/downloads/>

WHAT ARE THE KEY ELEMENTS OF YOUR INFORMATION SECURITY COMPLIANCE PROGRAM? PLEASE SPECIFY THE FRAMEWORK(S) OR AUDITING PROCEDURES(S) YOU COMPLY WITH OR CERTIFY TO. DOES YOUR PROGRAM INCLUDE AN ASSET-BASED RISK ASSESSMENT AND INTERNAL AUDIT PROCESS?

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To ensure secure data protection, EMpanel Online has made the conscious decision to use dedicated servers. These servers are redundant and local to the data being stored. Our systems are built to meet rigorous security requirements, including servers, systems, networks, and database access controls with industry-leading protection, backup, and redundancy. We are working to implement ISO 27001 frameworks for security compliance.

DO YOU CERTIFY TO OR COMPLY WITH A QUALITY FRAMEWORK SUCH AS ISO 20252?

EMpanel Online is fully compliant with the ISO 20252 quality standard.

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## Metrics

EMpanel Online can share certain metrics upon request. We do not make these reports publicly available and reserve this service for partnership-level clients.

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## *EMpanel Online*

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